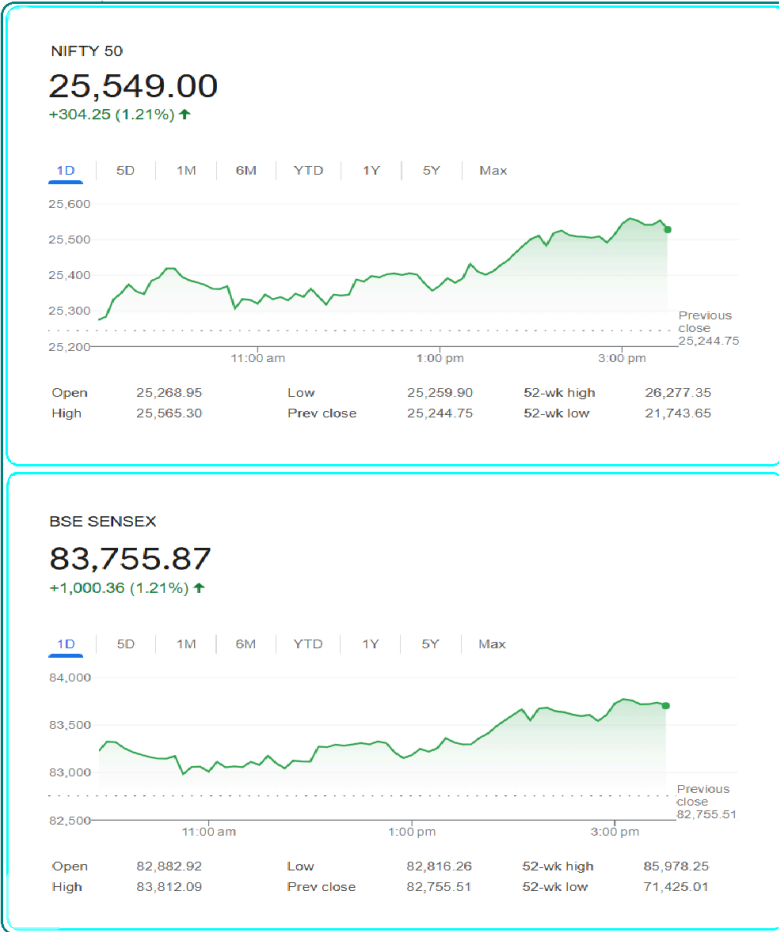


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25549.00	25244.75	1.21%
S&P BSE SENSEX	83755.87	82755.51	1.21%
NIFTY MID100	59227.40	58881.70	0.59%
NIFTY SML100	18805.60	18727.85	0.42%

(Source: [NSE](#), [BSE](#))

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57206.70	56621.15	1.03%

Market Wrap Up

- The domestic equity benchmarks ended with major gains today, extending their gains for third consecutive trading sessions, supported by gains in Asian markets and continued optimism around a possible Israel-Iran ceasefire. The Nifty settled around 25,550 mark.
- The S&P BSE Sensex zoomed 1,000.36 points or 0.121% to 83,755.87. The Nifty 50 index surged 304.25 points or 1.21% to 25,549. In the past three consecutive trading sessions, the Sensex advanced 2.27% while the Nifty rose 2.31%.
- The S&P BSE Mid-Cap index rose 0.56% and the S&P BSE Small-Cap index added 0.12%.
- Among the sectoral indices, the Nifty Metal index (up 2.31%), the Nifty Oil & Gas index (up 1.86%) and the Nifty Financial Services index (up 1.53%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Media index (down 1.09%), the Nifty Realty index (down 1%) and the Nifty IT index (down 0.13%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **28059** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **HDFCBANK**, **BAJFINANCE**.
- Short** position build up for the **July** series has been witnessed in **TCS**, **LUPIN**, **M&M**.

(Source: Capitaline F&O)

NIFTY AUTO	23961.70	23827.80	0.56%
NIFTY FMCG	55118.80	54747.25	0.68%
NIFTY IT	38996.25	39046.30	-0.13%
NIFTY METAL	9544.55	9329.20	2.31%
NIFTY PHARMA	21808.20	21804.80	0.02%
NIFTY REALTY	1009.55	1019.70	-1.00%
BSE CG	70957.20	70703.12	0.36%
BSE CD	59299.41	58832.52	0.79%
BSE Oil & GAS	27585.87	27077.59	1.88%
BSE POWER	6851.29	6774.45	1.13%

(Source: [NSE](#), [BSE](#))

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39584.58	38942.07	1.65%
HANG SENG	24325.40	24474.67	-0.61%
STRAITS TIMES	3938.46	3925.98	0.32%
SHANGHAI	3448.45	3455.97	-0.22%
KOSPI	3079.56	3108.25	-0.92%
JAKARTA	6897.40	6832.14	0.96%
TAIWAN	22492.34	22430.61	0.28%
KLSE COMPOSITE	1528.16	1519.79	0.55%
ALL ORDINARIES	8773.60	8779.90	-0.07%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	118579.67	101657.64
NSE F&O	413675.04	383798.24

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	12594.38
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Adani Group** and Reliance Industries have partnered to distribute fuel, with Adani Total Gas outlets offering Jio-bp's petrol and diesel, and Jio-bp stations installing Adani Total's CNG units. This collaboration follows Reliance's acquisition of a stake in Adani Power's Mahan Energen last year.
- **JSW MG Motor India** has announced a price hike. The company will increase prices of its vehicles. The hike will be up to 1.5 percent. The new prices will be effective from July 1. The company cited rising input costs as the reason. This price revision impacts most of their models.
- India has purchased 80% of Russia's seaborne Urals crude exports so far in 2025, with **Reliance Industries** and Nayara Energy accounting for 45% of total shipments, according to Kpler data. Reliance alone has bought 77 million barrels this year, making it the world's largest Urals buyer.
- **ONGC** achieved a crucial step at the RDS site by removing tubing stands from the rig derrick, paving the way for rig base removal and capping stack installation. A temporary increase in non-toxic gas discharge is expected during the BOP dismantling, posing no risk beyond 500 meters.
- **Tata Steel Limited** has acquired 179.10 crore equity shares in its Singapore-based wholly owned subsidiary, T Steel Holdings Pte. Ltd (TSHP), for approximately Rs 1,562.54 crore. This acquisition, with shares valued at USD 0.1005 each, is part of Tata Steel's plan to infuse up to \$2.5 billion into TSHP by financial year 2025-26.
- **JSW Energy**, via Energizent Power, secured a 25-year PPA with NHPC for 300 MW of ISTS-connected solar-wind hybrid capacity at Rs 3.49/KWh. The project, located in Rajasthan and Andhra Pradesh, is slated for commissioning within 24 months. JSW Energy aims for 30 GW generation and 40 GWh storage by FY30, targeting carbon neutrality by 2050.
- **KNR Construction** has received a Rs. 4,801 Crore contract. The contract underlines development and operation of the Banhardih Coal Mining Block in Jharkhand. The company has received this award from Patratu Vidyut Utpadan Nigam Ltd, a JV between NTPC and JBVNL. The deal was granted to the joint venture

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
SHRIRAMFIN	703.20	675.10	4.16%
JIOFIN	312.50	303.30	3.03%
HINDALCO	690.60	672.65	2.67%
TATASTEEL	160.54	156.39	2.65%
ADANI PORTS	1429.30	1393.10	2.60%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
DRREDDY	1321.50	1341.60	-1.50%
TECHM	1690.20	1705.00	-0.87%
HEROMOTOCO	4278.00	4300.80	-0.53%
MARUTI	12715.00	12767.00	-0.41%
SBIN	797.05	800.05	-0.37%

(Source: [Moneycontrol](#))

- **BITES Ltd.** has received a fresh mandate from the Gujarat Urban Development Company Limited (GUDC). The project, valued at Rs. 28.5 crore (excluding GST).
- **Aurionpro Solutions** announced a significant win to implement its Automated Fare Collection (AFC) system for the public transport system in Egypt.
- **Cummins India** announced the launch of its Battery Energy Storage Systems (BESS), expanding its sustainable solutions portfolio in line with Destination Zero strategy.
- **SBC Exports** securing a repeat export order from Gawjee Brothers Wholesalers Co. LLC, Dubai, for supplying T-shirts, trousers, shorts, and other garment articles.
- **Tejas Networks** announced a multi -faceted strategic partnership with Rakuten Symphony to develop integrated open RAN solutions and engage in joint go-to-market efforts, both in India and internationally.

between KNRCL-HCPL. With this contract, the company marks its strategic foray into the coal mining operations.

- **CDSL** has entered into a MoU with IIM Mumbai to tap into advanced data analytics and research.
- **Vodafone Idea** is negotiating to raise Rs. 250 Billion (\$2.9 Billion) in loans to strengthen its network and counter subscriber losses to rivals.
- OM Infra secured a turnkey contract from **NHPC** for hydro-mechanical works at India's largest power generation project, the 2880 MW Dibang Project in Arunachal Pradesh.
- **H.G. Infra Engineering** announced that it has incorporated of a wholly owned subsidiary (WOS), H.G. Choraniya Bess, on 25 June 2025.
- **Western Carriers (India)** announced that it has secured a work order valued at approximately Rs 558 crore from Jindal Stainless (JSL).
- **Texmaco Rail & Engineering** received an order worth Rs 535 crore from Camalco S.A, Cameroon to supply open top wagons.
- **SMS Pharmaceuticals** announced that its Central Laboratory Analytical Services, located at, Gagillapur, Telangana, has successfully cleared the recent inspection by the US Food and Drug inspection (USFDA) with zero observations.
- **GAIL (India)** has successfully gone live with SAP S/4 HANA in a formal launch on 25 June 2025.
- **Intellect Design Arena** announced the launch of PF Cloud, the world's first Open Business Impact AI Platform, Purple Fabric on PF Cloud at GIFT City, India's flagship International Financial Services Centre (IFSC).
- **Cummins India** announced the launch of its Battery Energy Storage Systems (BESS).
- **Nestle India Limited** has approved the bonus issue in the ratio of 1:1.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

Global News

- U.S. new home sales plunged by 13.7% to an annual rate of 623,000 in May after spiking by 9.6% to a revised rate of 722,000 in April.
- U.S. building permits in the United States fell by 2% to a seasonally adjusted annualized rate of 1.394 million in May 2025, the lowest since June 2020.
- Germany's GfK Consumer Climate Indicator edged down to -20.3 heading into July 2025 from a marginally revised -20.0 in the previous month.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

Economic News

- Crude Oil traded at US\$ 65.17/bbl (IST 17:00).
- INR strengthened to Rs. 85.70 from Rs. 86.08 against each US\$ resulting in daily change of 0.44%.
- Icria has retained India's GDP growth forecast for FY26 at 6.2%, contingent on favorable monsoons and stable crude oil prices. While urban consumption prospects are positive, geopolitical tensions and volatile financial markets pose downside risks. CPI inflation is projected to cool to 3.5%, potentially leading to a rate cut in October 2025, despite a likely pause in August.
- India's foreign direct investment surged to \$8.8 billion in April, a 22% increase year-over-year, bolstering the RBI's foreign exchange reserves. While non-resident deposit inflows slowed, overall external commercial borrowing rose significantly. Despite a drop in foreign portfolio investment, India's external sector remains resilient, with forex reserves reaching \$698.95 billion in June.
- The Services Export Promotion Council (SEPC) and IAMAI have partnered to boost India's digital services exports. This collaboration aims to strengthen the global presence of Indian digital businesses by promoting international market access and addressing trade-related policy challenges. Joint working groups will be formed with government bodies to resolve issues faced by digital exporters.
- India's PLI schemes show strong results. Investments reach Rs 1.76 lakh crore. Production exceeds Rs 16.5 lakh crore. Over 12 lakh jobs are created by March 2025. Incentives of Rs 21,534 crore are disbursed across sectors. Focus is now on sectors with competitive advantages. The schemes boost exports and domestic value addition. MSMEs also benefit significantly from the initiative.
- The CBIC has extended the validity of No Objection Certificates for imported alcoholic beverages bottled at origin or in bulk with over 10% alcohol content. This follows FSSAI's clarification allowing 365-day validity for consignments without expiry dates. Consignments exceeding this period can be revalidated after inspection and fee payment.

(Source: [Economic Times](#), [Business Standard](#))

Forthcoming Events

Board Meetings as on 27/06/2025

Alps Industries Limited	Financial Results
Hindustan Aeronautics Limited	Dividend
J.G.Chemicals Limited	Dividend

(Source: NSE)

Corporate Actions as on 27/06/2025

Bajaj Finserv Limited	Dividend - Re 1 Per Share
Bajaj Holdings & Investment Limited	Dividend - Rs 28 Per Share
CARE Ratings Limited	Dividend - Rs 11 Per Share
Cipla Limited	Dividend - Rs 13 Per Sh/Spcl Dividend - Rs 3 Per Sh
HDFC Bank Limited	Dividend - Rs 22 Per Share
Allied Blenders and Distillers Limited	Dividend - Rs 3.60 Per Share
Jayant Agro Organics Limited	Dividend - Rs 2.50 Per Share
Maharashtra Scooters Limited	Dividend - Rs 30 Per Sh/ Spcl Dividend - Rs 30 Per Sh
Rainbow Childrens Medicare Limited	Dividend - Rs 3 Per Share
RPG Life Sciences Limited	Dividend - Rs 20 Per Sh/ Spcl Dividend - Rs 4 Per Sh
Swaraj Engines Limited	Dividend - Rs 104.50 Per Share
Syngene International Limited	Dividend - Rs 1.25 Per Share
Welspun Living Limited	Dividend - Rs 1.7 Per Share

(Source: NSE)

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