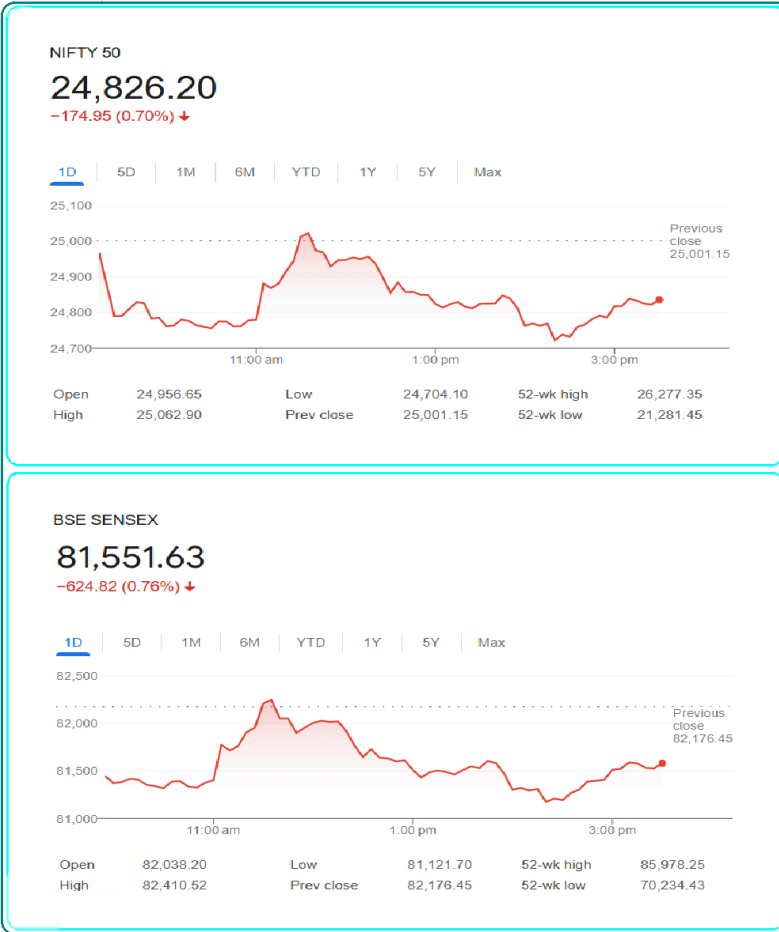


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24826.20	25001.15	-0.70%
S&P BSE SENSEX	81551.63	82176.45	-0.76%
NIFTY MID100	57154.50	57067.25	0.15%
NIFTY SML100	17725.15	17707.80	0.10%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55352.80	55572.00	-0.39%

Market Wrap Up

- The domestic equity benchmarks ended with significant losses today, snapping a two-day winning streak, as mixed global cues and profit booking weighed on investor sentiment. The Nifty closed below the 24,850 mark.
- The S&P BSE Sensex tanked 624.82 points or 0.76% to 81,551.63. The Nifty 50 index slipped 174.95 points or 0.70% to 24,826.20.
- The S&P BSE Mid-Cap index rose 0.18% and the S&P BSE Small-Cap index added 0.19%.
- Among the sectoral indices, the Nifty PSU Bank index (up 0.26%), the Nifty Realty index (up 0.24%) and the Nifty Pharma index (up 0.11%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 0.88%), the Nifty IT index (down 0.75%) and the Nifty Auto index (up 0.70%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **14744** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **SBIN, JIOFIN, MARICO, COFORGE**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, BHARTIARTL, ICICIBANK, HDFCBANK, INFY**.

(Source: Capitaline F&O)

NIFTY AUTO	23596.90	23763.15	-0.70%
NIFTY FMCG	56547.60	57049.70	-0.88%
NIFTY IT	37501.45	37785.90	-0.75%
NIFTY METAL	9294.95	9336.45	-0.44%
NIFTY PHARMA	21524.95	21501.80	0.11%
NIFTY REALTY	946.30	944.00	0.24%
BSE CG	70168.15	69874.85	0.42%
BSE CD	58751.00	58705.54	0.08%
BSE Oil & GAS	27261.33	27402.32	-0.51%
BSE POWER	6824.45	6848.42	-0.35%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37724.11	37531.53	0.51%
HANG SENG	23381.99	23282.33	0.43%
STRAITS TIMES	3896.09	3875.60	0.53%
SHANGHAI	3340.69	3346.84	-0.18%
KOSPI	2637.22	2644.40	-0.27%
JAKARTA	7198.97	7188.35	0.15%
TAIWAN	21336.54	21536.57	-0.93%
KLSE COMPOSITE	1526.16	1534.30	-0.53%
ALL ORDINARIES	8631.50	8588.80	0.50%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	119285.46	93170.47
NSE F&O	431025.33	371733.86

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	348.45
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Bharti Airtel** has introduced all-in-one OTT entertainment packs for prepaid users in India, integrating access to over 25 streaming platforms like Netflix, JioCinema, and Zee5 into a single recharge. Starting at Rs 279, these packs aim to simplify streaming access and enhance user experience.
- **KEC International** posted consolidated net profit jumped 76.7% to Rs 268.20 crore on 11.5% increase in revenue from operations to Rs 6,872.12 crore in Q4 FY25 over Q4 FY24.
- **Tata Motors** paid Rs 38,892 crore in global taxes for fiscal year 2024-25. This is a slight decrease from the previous year. Direct tax contributions decreased. However, indirect contributions saw a significant rise. The company's consolidated net profit was Rs 28,149 crore. Total revenue reached Rs 4,39,695 crore. Tata Motors shares closed higher on Monday.
- **Lupin** partners with SteinCares. The agreement focuses on ranibizumab's commercialisation. Latin America, excluding Mexico and Argentina, is the target. SteinCares will handle regulatory aspects. Lupin will manufacture the biosimilar drug. This collaboration aims to improve retinal care access.
- **PTC India** reported a 308.15% year-on-year surge in consolidated net profit to Rs 371.87 crore in Q4 FY25, compared to Rs 91.11 crore in Q4 FY24, primarily driven by an exceptional gain of Rs 305.96 crore. Revenue declined 14.38% YoY to Rs 2,886.93 crore in Q4 FY25, from Rs 3,371.74 crore in Q4 FY24.
- **Blue Dart Express** reported 29.09% decline in consolidated net profit to Rs 55.15 crore in Q4 FY25 as against Rs 77.78 crore posted in Q4 FY24. Revenue rose 7.13% YoY to Rs 1,417.32 crore in the quarter ended 31 March 2025.
- **Olectra Greentech** posted consolidated net profit slipped 55.2% to Rs 20.69 crore in Q4 FY25, compared with Rs 46.62 crore in Q3 FY25. Revenue declined 12.89% QoQ to Rs 448.92 crore during the quarter.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	291.40	281.75	3.43%
INDUSINDBK	820.70	800.10	2.57%
TRENT	5573.00	5526.00	0.85%
SUNPHARMA	1683.40	1676.10	0.44%
ADANIPTS	1404.20	1400.20	0.29%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ULTRACEMCO	11421.00	11689.00	-2.29%
ITC	433.90	442.90	-2.03%
JSWSTEEL	1013.70	1032.30	-1.80%
TATAMOTORS	716.45	729.00	-1.72%
AXISBANK	1195.60	1215.20	-1.61%

(Source: [Moneycontrol](#))

- **Novartis** introduces a financing scheme with Pine Labs for its cholesterol-lowering drug, Sybrava (inclisiran), in India, aiming to broaden access by offering zero-interest EMI options. This strategy addresses the drug's high cost, previously Rs 1.2 lakh per injection, and involves partnerships with **Mankind Pharma**, **JB Pharma**, and **Lupin** to expand market reach.
- **RailTel Corporation of India** announced that it has received a work order worth Rs 25.12 crore from the office of the Inspector General of Police (Technical Services), Andhra Pradesh.

- **Venus Remedies** soared 11.86% to Rs 405.20 after the company reported a 99.80% surge in consolidated net profit to Rs 21 crore in Q4 FY25 as against Rs 10.51 crore recorded in Q4 FY24. Revenue decreased marginally to Rs 194.97 crore in Q4 FY25, as against Rs 195.16 crore posted in the corresponding quarter of the previous year.
- **Bajaj Healthcare** reported standalone net profit of Rs 11.18 crore in Q4 FY25 as compared with net loss of Rs 29.92 crore posted in Q4 FY24. Revenue jumped 15.36% year-on-year (YoY) to Rs 154.47 crore in the quarter ended 31 March 2025.
- **Nazara Technologies** reported 19.17% decline in consolidated net profit from continuing operations to Rs 13.78 crore in Q4 FY25 as against Rs 17.05 crore posted in Q4 FY24. Revenue soared 95.40% YoY to Rs 520.20 crore in the quarter ended 31 March 2025.
- **Bondada Engineering** announced that it has secured a Letter of Award (LOA) worth Rs 204.20 crore from Telangana Power Generation Corporation (TGGENCO) for setting up of Battery Energy Storage Systems (BESS).
- Sanlam, a major asset manager, has entered the Indian market by investing Rs 105 crore for a 23% stake in **Shriram Asset Management Company** (AMC). This investment makes Sanlam a co-promoter alongside Shriram Credit Company. The capital infusion will be used to expand Shriram AMC's offerings and attract talent.

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

Global News

- China's industrial profits rose 1.4% yoy to CNY 2,117.02 billion in the first four months of 2025, picking up from 0.8% growth in the January-March period. In April alone, industrial profits increased 3.0% yoy, up from a 2.6% growth in March.
- Eurozone economic sentiment indicator increased to 94.8 in May 2025 from an upwardly revised 93.8 in April. The consumer confidence indicator rose by 1.4 to -15.2 in May 2025 from -16.6 in April.
- Germany's GfK Consumer Climate Indicator rose to -19.9 heading into June 2025, up from a revised -20.8 in the previous month.

- France's annual inflation rate unexpectedly eased to 0.7% in May 2025, the lowest level since February 2021, down from 0.8% in both March and April. On a monthly basis, the CPI slipped by 0.1%.

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

Economic News

- Crude Oil traded at US\$ 61.48/bbl (IST 17:00).
- INR weakened to Rs. 85.33 from Rs. 85.09 against each US\$ resulting in daily change of 0.28%.
- The Centre has proposed a 30% stipend increase under NAPS and NATS, potentially raising it to Rs 6,800-Rs 12,300 and linking it to the consumer price index for bi-annual revisions. This decision, made at the Central Apprenticeship Council meeting, aims to reduce dropout rates and attract more candidates.
- The government has implemented import restrictions on cabinet hinges priced below Rs 280 per kilogram, aiming to curb inexpensive imports, particularly from countries like China. This measure, announced by the directorate general of foreign trade (DGFT), requires importers to obtain permission for hinges falling below the specified price threshold. Previously, no such restrictions were in place.

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

Forthcoming Events

Board Meetings as on 28/05/2025

Natco Pharma Limited	Financial Results
Bata India Limited	Financial Results/Dividend
Cummins India Limited	Financial Results/Dividend
Hinduja Global Solutions Limited	Financial Results
Madras Fertilizers Limited	Financial Results
3M India Limited	Financial Results/Dividend
Aban Offshore Limited	Financial Results
Affordable Robotic & Automation Limited	Financial Results
Apollo Micro Systems Limited	Dividend
ARSS Infrastructure Projects Limited	Financial Results
Asian Hotels (North) Limited	Financial Results
Avanti Feeds Limited	Financial Results/Dividend
Bannari Amman Sugars Limited	Financial Results/Dividend
BGR Energy Systems Limited	Financial Results
Bharat Rasayan Limited	Financial Results/Dividend

BIRLASOFT LIMITED	Financial Results/Dividend
Chaman Lal Setia Exports Limited	Financial Results/Dividend
Cohance Lifesciences Limited	Financial Results
Deepak Nitrite Limited	Financial Results/Dividend
Dish TV India Limited	Financial Results
Dr. Agarwal's Health Care Limited	Financial Results
Elgi Equipments Limited	Financial Results/Dividend
EMS Limited	Financial Results/Dividend
FDC Limited	Financial Results
Federal-Mogul Goetze (India) Limited.	Financial Results
Finolex Cables Limited	Financial Results/Dividend
Gandhi Special Tubes Limited	Financial Results/Dividend
Granules India Limited	Financial Results/Dividend
GRM Overseas Limited	Financial Results
HeidelbergCement India Limited	Financial Results/Dividend
Hemisphere Properties India Limited	Financial Results
Himatsingka Seide Limited	Financial Results/Dividend
Hindustan Oil Exploration Company Limited	Financial Results
IFB Industries Limited	Financial Results
Indian Railway Catering And Tourism Corporation Limited	Financial Results/Dividend
Indo Farm Equipment Limited	Financial Results
Insecticides (India) Limited	Financial Results
ION Exchange (India) Limited	Financial Results/Dividend
JSW Holdings Limited	Financial Results
Juniper Hotels Limited	Financial Results
Khaitan (India) Limited	Financial Results
Liberty Shoes Limited	Financial Results
Lokesh Machines Limited	Financial Results
Mamata Machinery Limited	Financial Results/Dividend
Man Industries (India) Limited	Fund Raising
Mishra Dhatu Nigam Limited	Financial Results
MMTC Limited	Financial Results
Mstc Limited	Financial Results/Dividend
NACL Industries Limited	Financial Results
National Fertilizers Limited	Financial Results
Nuvama Wealth Management Limited	Financial Results/Dividend
Oriental Carbon & Chemicals Limited	Financial Results/Voluntary Delisting
Polyplex Corporation Limited	Financial Results/Dividend
Rossell India Limited	Financial Results/Dividend
Som Distilleries & Breweries Limited	Financial Results
Steel Authority of India Limited	Financial Results/Dividend
Suprajit Engineering Limited	Financial Results/Dividend
Suraksha Diagnostic Limited	Financial Results/Dividend

Tarsons Products Limited	Financial Results
Tolins Tyres Limited	Financial Results
TVS Supply Chain Solutions Limited	Financial Results
Welspun Corp Limited	Financial Results/Dividend/Fund Raising

(Source: NSE)

Corporate Actions as on 28/05/2025

Colgate Palmolive (India) Limited	Interim Dividend - Rs 27 Per Share
ITC Limited	Dividend - Rs 7.85 Per Share
Sundaram Finance Holdings Limited	Interim Dividend - Re 0.60 Per Share

(Source: NSE)

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