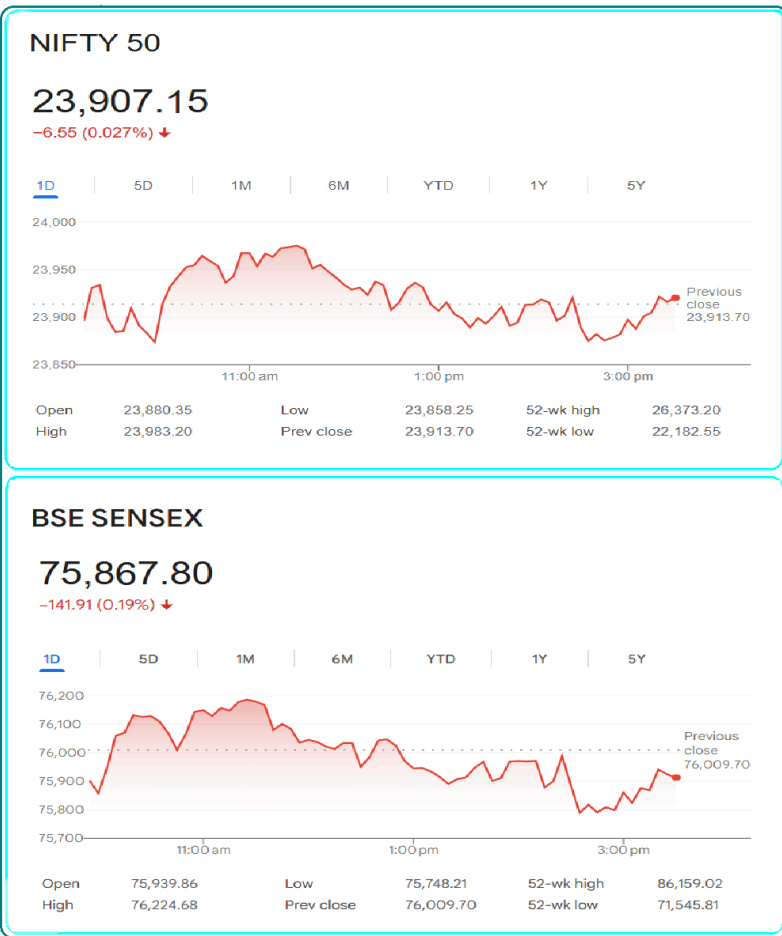


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23907.15	23913.70	-0.03%
S&P BSE SENSEX	75867.80	76009.70	-0.19%
NIFTY MID100	62558.85	62298.90	0.42%
NIFTY SML100	18294.30	18267.20	0.15%

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

Market Wrap Up

- The key equity benchmarks ended with minor cuts, declining for the second consecutive session amid cautious sentiment triggered by lingering Iran-US geopolitical tensions and fresh foreign fund outflows. However, broader markets remained resilient and outperformed the benchmark indices, supported by stock-specific buying interest. The Nifty settled below the 23,950 mark.
- The S&P BSE Sensex declined 141.90 points or 0.19% to 75,867.80. The Nifty 50 index shed 6.55 points or 0.03% to 23,907.15. In the two consecutive trading sessions, the Sensex and Nifty fell 0.81% and 0.51%, respectively.
- The BSE 150 MidCap Index added 0.83% and the BSE 250 SmallCap Index jumped 0.49%.
- Among the sectoral indices, the Nifty Media index (up 3.05%), the Nifty Metal index (up 1.67%), and the Nifty Auto index (up 1.45%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Financial Services index (down 0.77%), the Nifty Private Bank index (down 0.46%) and the Nifty IT index (down 0.25%) 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 **7023** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN**.
- **Short** position build up for the **June** series has been witnessed in **ONGC, ICICIBANK, HDFCBANK, INFY**.
- **Unwinding** position for the **June** series has been witnessed in **BHEL, POWERINDIA**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	54853.85	55092.90	-0.43%
NIFTY AUTO	26864.20	26480.50	1.45%
NIFTY FMCG	50141.90	50227.35	-0.17%
NIFTY IT	28906.70	28978.50	-0.25%
NIFTY METAL	13718.30	13492.55	1.67%
NIFTY PHARMA	24716.00	24659.20	0.23%
NIFTY REALTY	784.55	782.00	0.33%
BSE CG	81647.91	79107.54	3.21%
BSE CD	58462.61	57992.22	0.81%
BSE Oil & GAS	27497.21	27555.18	-0.21%
BSE POWER	8497.08	8228.17	3.27%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	64999.41	64996.09	0.01%
HANG SENG	25328.23	25599.45	-1.06%
STRAITS TIMES	CLOSED	5028.80	-
SHANGHAI	4093.73	4145.37	-1.25%
KOSPI	8228.70	8047.51	2.25%
JAKARTA	CLOSED	6130.19	-
TAIWAN	44256.80	43525.37	1.68%
KLSE COMPOSITE	CLOSED	1699.02	-
ALL ORDINARIES	8945.20	8882.60	0.70%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	135899.66	127513.37
NSE F&O	124105.74	317206.08

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1042.70

(Source: [NSE](#))

Corporate News

- JK Tyre & Industries** posted a consolidated net profit of Rs 177.99 crore in Q4 FY26, marking an 80.18% jump from Rs 98.78 crore recorded in the corresponding quarter last year. Revenue rose 12.36% YoY to Rs 4,223.44 crore in the quarter ended 31 March 2026.
- Transport Corporation of India** reported an 8.2% rise in consolidated net profit to Rs 124.5 crore on a 12.3% increase in net sales to Rs 1,323.8 crore in Q4 FY26 over Q4 FY25.
- Indian Railway Catering & Tourism Corporation** posted consolidated net profit declined 8.88% year-on-year to Rs 326.36 crore in Q4 FY26 from Rs 358.22 crore in Q4 FY25. Revenue rose 15.07% YoY to Rs 1,459.71 crore in Q4 FY26 from Q4 FY25. Profit before tax (PBT) stood at Rs 446.66 crore, down 5.42% YoY.
- Marksans Pharma** posted consolidated net profit of Rs 148.12 crore in Q4 FY26, up 63.60% YoY and 30.85% QoQ. Revenue from operations rose 20.84% YoY to Rs 856.11 crore in Q4 FY26, while increasing 13.48% QoQ.
- Pennar Industries** posted consolidated net profit rose 15.38% to Rs 41.04 crore in the quarter ended March 2026 as against Rs 35.57 crore during the previous quarter ended March 2025. Sales rose 2.10% to Rs 924.80 crore in the quarter ended March 2026 as against Rs 905.80 crore during the previous quarter ended March 2025.
- Jio** has introduced a new Rs 200 OTT Pass. This pass offers subscriptions to 15 OTT platforms and over 1000 live TV channels. It also includes 30GB of high-speed data and unlimited 5G connectivity for 28 days. This all-in-one entertainment and connectivity pack aims to simplify user subscriptions.
- Ola Electric** has received government approval for a new electric scooter designed for commercial use. This move signals Ola Electric's potential entry into the fast-growing commercial EV two-wheeler market this quarter. The scooter is expected to focus on operating economics and range for delivery and fleet operations.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HINDALCO	1149.70	1103.80	4.16%
TMPV	400.95	385.60	3.98%
POWERGRID	300.15	292.55	2.60%
ETERNAL	256.51	250.17	2.53%
NTPC	398.15	389.70	2.17%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ONGC	274.05	287.50	-4.68%
ITC	291.95	301.65	-3.22%
HDFCBANK	758.65	778.90	-2.60%
HDFCLIFE	609.60	618.85	-1.49%
WIPRO	201.58	203.73	-1.06%

(Source: [Moneycontrol](#))

- **Bharat Coking Coal** announced the commencement of commercial operations at its 2.0 MTPA Bhojudih Coal Washery from 26 May 2026.
- **Kernex Microsystems (India)** announced that it had secured an order worth Rs 475.21 crore from Chittaranjan Locomotive Works (CLW).

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

- **KEC International** has secured new orders totaling Rs 1,303 crore. These orders span across its transmission and distribution, civil, renewable, and cables and conductors businesses. The company received projects in India and international markets. These wins are expected to drive KEC International's future growth. The RPG Group company is a major player in global infrastructure EPC.
- **Coal India** arm South Eastern Coalfields Ltd's (SECL) CMD Harish Duhan said during the ongoing financial year 2026-27, SECL has made the highest contribution of 26.86 million tonnes towards Coal India's production milestone of 100 million tonnes achieved so far.
- **HFCL Ltd** has received a purchase order worth Rs 135.09 crore from RailTel Corporation of India Limited, a Government of India Undertaking, under the Ministry of Railways for the Annual Maintenance Contract (AMC) of the project "Implementation of Secure Operations (OPS) Network" for data centers of Indian defence forces.

Global News

- China's industrial profits jumped 18.2% year-on-year in the January-April 2026 period, following a 15.5% rise in the first quarter. In April, industrial profits surged 24.7%, the biggest gain since November 2023, after a 15.8% growth in March.
- U.S. Conference Board said its consumer confidence index dipped to 93.1 in May from an upwardly revised 93.8 in April.
- U.S. house price index increased 0.1% in March 2026, as expected, following a downwardly revised 0.1% fall in February. Year-over-year, home values were up 1.7% between Q1 2025 and Q1 2026.
- France's consumer confidence indicator in France fell to 82 in May 2026 from 84 in April.
- Japan producer prices were up 3.0% on year in April, unchanged from the March reading. On a monthly basis, producer prices were up 0.5% - slowing from 1.3% in the previous month.

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

Economic News

- Crude Oil traded at US\$ 90.11/bbl (IST 17:00).
- INR weakened to Rs. 95.70 from Rs. 95.69 against each US\$ resulting in daily change of 0.01%.
- Indian agrochemical companies face challenges ahead. Higher prices for farm chemicals and uncertain monsoon rains are expected to impact performance in the second quarter of fiscal year 2027. Global El Nino concerns add to the worry. Meanwhile, China's pesticide production continues to surge, impacting global supply dynamics. Other chemical sectors also show signs of slowdown.
- Canada's Minister of International Trade Maninder Sidhu announced a Team Canada Trade Mission to India for November. This follows meetings between Indian Commerce Minister Piyush Goyal and Canadian business leaders. The mission aims to explore collaborations in key sectors like AI, critical minerals, and clean technology. Discussions also focused on strengthening bilateral investment and technology partnerships between the two nations.

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

Forthcoming Events

Board Meetings as on 28/05/2026

Alkem Laboratories Limited	Financial Results/Dividend
Ashok Leyland Limited	Financial Results/Dividend/Fund Raising
Apar Industries Limited	Financial Results/Dividend
ARSS Infrastructure Projects Limited	Financial Results
Asian Hotels (East) Limited	Financial Results/Dividend
Asian Hotels (North) Limited	Financial Results
Avanti Feeds Limited	Financial Results/Dividend
Banco Products (I) Limited	Financial Results/Dividend
BF Utilities Limited	Financial Results
Bharat Dynamics Limited	Financial Results/Dividend
Deepak Fertilizers and Petrochemicals Corporation Limited	Financial Results/Dividend
Ecos (India) Mobility & Hospitality Limited	Financial Results
Elgi Rubber Company Limited	Financial Results
Enviro Infra Engineers Limited	Financial Results
Finolex Cables Limited	Financial Results/Dividend
Gaudium IVF and Women Health Limited	Financial Results

Gokul Refoils and Solvent Limited	Financial Results
Graphite India Limited	Financial Results/Dividend
Gujarat Kidney And Super Speciality Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results/Dividend
H.G. Infra Engineering Limited	Financial Results/Dividend
Happiest Minds Technologies Limited	Financial Results/Dividend
Heranba Industries Limited	Financial Results/Dividend
Hindustan Media Ventures Limited	Financial Results/Dividend
Hi-Tech Pipes Limited	Financial Results/Fund Raising
IFB Agro Industries Limited	Financial Results
India Nippon Electricals Limited	Financial Results
Insecticides (India) Limited	Financial Results
Jagran Prakashan Limited	Financial Results/Dividend
JHS Svendgaard Retail Ventures Limited	Financial Results
JSW Holdings Limited	Financial Results
Kabra Extrusion Technik Limited	Financial Results/Dividend
Kohinoor Foods Limited	Financial Results
Lemon Tree Hotels Limited	Financial Results
Lumax Industries Limited	Financial Results/Dividend
Mallcom (India) Limited	Financial Results/Dividend
Max India Limited	Financial Results
Mcnally Bharat Engineering Company Limited	Financial Results
MMTC Limited	Financial Results
NRB Industrial Bearings Limited	Financial Results
Orient Press Limited	Financial Results
Pilani Investment and Industries Corporation Limited	Financial Results/Dividend
Praj Industries Limited	Financial Results/Dividend
Prime Focus Limited	Financial Results/Dividend
Procter & Gamble Hygiene and Health Care Limited	Financial Results/Dividend
Relaxo Footwears Limited	Financial Results/Dividend
Schneider Electric Infrastructure Limited	Financial Results
SEL Manufacturing Company Limited	Financial Results
Shalimar Paints Limited	Financial Results
SPML Infra Limited	Financial Results
Taj GVK Hotels & Resorts Limited	Financial Results/Dividend
TBO Tek Limited	Financial Results
Tenneco Clean Air India Limited	Financial Results
Texmo Pipes and Products Limited	Financial Results
The Anup Engineering Limited	Financial Results/Dividend
The Ruby Mills Limited	Financial Results/Dividend
TIL Limited	Financial Results
Tolins Tyres Limited	Financial Results
Updater Services Limited	Financial Results

V2 Retail Limited	Financial Results
Veto Switchgears And Cables Limited	Financial Results/Dividend
Vivimed Labs Limited	Financial Results
Weizmann Limited	Financial Results/Dividend

Board Meetings as on 29/05/2026

Asian Paints Limited	Financial Results/Dividend
BEML Limited	Financial Results/Dividend
A2Z Infra Engineering Limited	Financial Results
Aarey Drugs & Pharmaceuticals Limited	Financial Results
Aegis Logistics Limited	Financial Results/Dividend
Anlon Healthcare Limited	Financial Results
Antony Waste Handling Cell Limited	Financial Results/Dividend
Archies Limited	Financial Results
Ausom Enterprise Limited	Financial Results/Dividend
AvenuesAI Limited	Financial Results
Bafna Pharmaceuticals Limited	Financial Results
Bajaj Hindusthan Sugar Limited	Financial Results
Bang Overseas Limited	Financial Results
Bannari Amman Spinning Mills Limited	Financial Results/Dividend
Bartronics India Limited	Financial Results
Deccan Cements Limited	Financial Results/Dividend
Dreamfolks Services Limited	Financial Results
EMS Limited	Financial Results
Everest Kanto Cylinder Limited	Financial Results/Dividend
Foods & Inns Limited	Financial Results/Dividend
Glenmark Pharmaceuticals Limited	Financial Results/Dividend
GRM Overseas Limited	Financial Results
Gufic Biosciences Limited	Financial Results/Dividend
Gujarat Alkalies and Chemicals Limited	Financial Results/Dividend
Gujarat Gas Limited	Financial Results/Dividend
Gujarat Industries Power Company Limited	Financial Results/Dividend
GVK Power & Infrastructure Limited	Financial Results
Hardwyn India Limited	Financial Results
Hilton Metal Forging Limited	Financial Results
Hinduja Global Solutions Limited	Financial Results
HT Media Limited	Financial Results
ICDS Limited	Financial Results
Ice Make Refrigeration Limited	Financial Results/Dividend
IL&FS Investment Managers Limited	Financial Results/Dividend

Indian Card Clothing Company Limited	Financial Results
Indian Renewable Energy Development Agency Limited	Financial Results/Dividend
Ingersoll Rand (India) Limited	Financial Results/Dividend
Inox Green Energy Services Limited	Financial Results
Inox Wind Limited	Financial Results
InterGlobe Aviation Limited	Financial Results
IPCA Laboratories Limited	Financial Results/Dividend
Jamna Auto Industries Limited	Financial Results/Dividend
Jindal Poly Investment and Finance Company Limited	Financial Results
Jinkushal Industries Limited	Financial Results
JM Financial Limited	Financial Results/Dividend
Jyoti CNC Automation Limited	Financial Results
Kernex Microsystems (India) Limited	Financial Results
Kitex Garments Limited	Financial Results/Dividend
KNR Constructions Limited	Financial Results/Dividend
LCC Infotech Limited	Financial Results
Lovable Lingerie Limited	Financial Results
Lumax Auto Technologies Limited	Financial Results/Dividend
Maan Aluminium Limited	Financial Results
Manaksia Limited	Financial Results
Mcleod Russel India Limited	Financial Results
Mirza International Limited	Financial Results
Mishra Dhatu Nigam Limited	Financial Results/Dividend
MMTC Limited	Financial Results
Mstc Limited	Financial Results/Dividend
Munjaj Showa Limited	Financial Results/Dividend
Murudeshwar Ceramics Limited	Financial Results
Natco Pharma Limited	Financial Results
NCL Industries Limited	Financial Results/Dividend
NIBE Limited	Financial Results/Dividend
NMDC Limited	Financial Results/Dividend
NMDC Steel Limited	Financial Results
Nureca Limited	Financial Results
Olectra Greentech Limited	Financial Results/Dividend
Panacea Biotec Limited	Financial Results/Dividend
Premier Explosives Limited	Financial Results/Dividend
Radiant Cash Management Services Limited	Financial Results/Dividend
Rico Auto Industries Limited	Financial Results/Dividend
Sreeleathers Limited	Financial Results/Dividend
Steel Strips Wheels Limited	Financial Results/Dividend
Tasty Bite Eatables Limited	Financial Results/Dividend
Tega Industries Limited	Financial Results/Dividend
The Hi-Tech Gears Limited	Financial Results/Dividend

Tilaknagar Industries Limited	Financial Results/Dividend
Triveni Engineering & Industries Limited	Financial Results/Dividend
Valecha Engineering Limited	Financial Results

(Source: NSE)

Corporate Actions as on 29/05/2026

Bajaj Auto Limited	Dividend - Rs 150 Per Share
Bank of India	Dividend - Rs 4.65 Per Share
GlaxoSmithKline Pharmaceuticals Limited	Dividend - Rs 57 Per Share
Home First Finance Company India Limited	Dividend - Rs 5.20 Per Share
ICICI Lombard General Insurance Company Limited	Dividend - Rs 7 Per Share
JB Chemicals & Pharmaceuticals Limited	Dividend - Rs 9.30 Per Share
Life Insurance Corporation Of India	Bonus 1:1
Caplin Point Laboratories Limited	Interim Dividend - Rs 4 Per Share
Dhanuka Agritech Limited	Buy Back
Eris Lifesciences Limited	Interim Dividend - Rs 7.21 Per Share
S Chand And Company Limited	Interim Dividend - Rs 4 Per Share
Torrent Pharmaceuticals Limited	Dividend - Rs 9 Per Share
UNO Minda Limited	Dividend - Rs 1.75 Per Share
Zydus Lifesciences Limited	Buy Back

(Source: NSE)

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