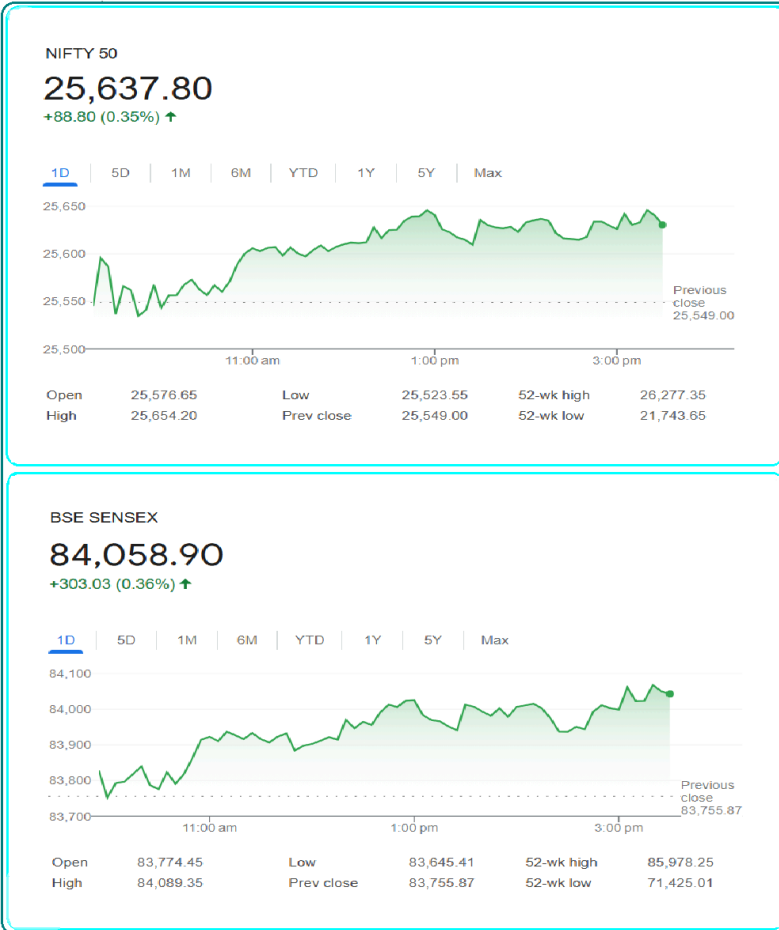


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	25637.80	25549.00	0.35%
S&P BSE SENSEX	84058.90	83755.87	0.36%
NIFTY MID100	59385.15	59227.40	0.27%
NIFTY SML100	18976.80	18805.60	0.91%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57443.90	57206.70	0.41%

Market Wrap Up

- The domestic equity benchmarks ended with minor gains today, marking the fourth consecutive day of gains, driven by strong foreign institutional investor (FII) inflows, global optimism, and the U.S. Federal Reserve signaling a softer policy outlook. The positive momentum persisted despite lingering global risks and concerns over upcoming tariff deadlines. The Nifty settled above 25,600 level. The S&P BSE Sensex added 303.03 points or 0.36% to 84,058.90. The Nifty 50 index surged 88.80 points or 0.35% to 25,637.80. In the past four consecutive trading sessions, the Sensex jumped 2.64% while the Nifty rose 2.67%. The S&P BSE Mid-Cap index rose 0.38% and the S&P BSE Small-Cap index added 0.54%.
- Among the sectoral indices, the Nifty OIL & Gas index (up 1.19%), the Nifty Healthcare index (up 0.71%) and the Nifty Pharma index (up 0.55%) outperformed the Nifty 50 index. Meanwhile, the Nifty Realty index (down 1.55%), the Nifty IT index (down 0.44%) and the Nifty Consumer Durables index (down 0.36%) 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 **3384** 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**.
- Short** position build up for the **July** series has been witnessed in **INFY**, **BAJFINANCE**, **ETERNAL**.
- Unwinding** position for the **July** series has been witnessed in **BHEL**, **TATAPOWER**.

(Source: Capitaline F&O)

NIFTY AUTO	24007.95	23961.70	0.19%
NIFTY FMCG	55109.00	55118.80	-0.02%
NIFTY IT	38822.95	38996.25	-0.44%
NIFTY METAL	9578.20	9544.55	0.35%
NIFTY PHARMA	21928.60	21808.20	0.55%
NIFTY REALTY	993.95	1009.55	-1.55%
BSE CG	71548.78	70957.20	0.83%
BSE CD	59533.77	59299.41	0.40%
BSE Oil & GAS	27919.83	27585.87	1.21%
BSE POWER	6929.40	6851.29	1.14%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	40150.79	39584.58	1.43%
HANG SENG	24284.15	24325.40	-0.17%
STRAITS TIMES	3966.20	3938.46	0.70%
SHANGHAI	3424.23	3448.45	-0.70%
KOSPI	3055.94	3079.56	-0.77%
JAKARTA	CLOSED	6897.40	-
TAIWAN	22580.08	22492.34	0.39%
KLSE COMPOSITE	CLOSED	1528.16	-
ALL ORDINARIES	8743.60	8773.60	-0.34%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	153035.00	118579.67
NSE F&O	175660.36	413675.04

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	1397.02
NET SELL	-

(Source: [NSE](#))

Corporate News

- **JSW Paints** will acquire Akzo Nobel's India business for Rs 12,000 crore. This deal will make JSW Paints the fourth-largest paint maker in India. JSW will acquire a 75% stake in Akzo Nobel India. The acquisition will trigger an open offer for a 26% stake from minority shareholders. Akzo Nobel India has a 7% market share in India.
- Securities and Exchange Board of India (SEBI) approved **Jio BlackRock Broking** to function as a stockbroker.
- **Biocon** has scrapped its plans to introduce generic versions of Novo Nordisk's Ozempic and Wegovy in China, citing intense local competition. The decision comes as numerous Chinese drugmakers are developing generics and biosimilars ahead of the semaglutide patent expiration in 2026. This shift occurs despite projections of significant increases in overweight and obese adults in China.
- AdaniConneX Pvt Ltd, a joint venture of **Adani Enterprises Ltd**, has acquired a 100% stake in Granthik Realtors Pvt Ltd for Rs 85.99 crore. This acquisition, completed on June 26, 2025, will bolster AdaniConneX's infrastructure development plans by providing access to significant land assets and key licenses, facilitating faster project execution.
- **Aditya Birla Capital** Digital app faced a security breach. Hackers targeted their mobile application, ABCD. They stole digital gold worth approximately Rs. 1.95 crore. The theft impacted 435 customers. Users reported unauthorized sales of their gold holdings. An internal investigation was launched. The company filed a police report. Affected customer accounts were restored. Balances have been replenished following the incident.
- **NTPC's** 3,300-MW Barh Super Thermal Power Project in Bihar is set to achieve full commercial operation. This milestone will be reached on July 1, 2025, with the commercial launch of Unit-3 (660 MW) under Stage-I. Following this, NTPC's total installed and commercial capacity will rise to 60,978 MW on a standalone basis and 82,080 MW on a group basis.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
JIOFIN	323.45	312.50	3.50%
ASIANPAINT	2358.70	2289.80	3.01%
APOLLOHOSP	7308.50	7101.50	2.91%
INDUSINDBK	857.70	836.10	2.58%
ADANIENT	2646.30	2586.20	2.32%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
TATACONSUM	1124.30	1145.40	-1.84%
DRREDDY	1301.00	1321.50	-1.55%
TRENT	6019.50	6107.00	-1.43%
WIPRO	265.05	268.52	-1.29%
ETERNAL	261.86	265.18	-1.25%

(Source: [Moneycontrol](#))

- **Hitachi Energy India** has secured an order from Power Grid Corporation of India to supply 30 units of 765-kV transformers, which will be manufactured in Gujarat. These transformers will enhance Powergrid's grid security and efficiency, meeting increasing energy demands and transmitting power equivalent to 30 million households.
- **Mahindra Lifespace Developers** has secured a redevelopment project in Mumbai's Mulund, valued at over Rs 1,250 crore. The 3.08-acre project will feature residential units for existing members and new buyers. Its strategic location near key infrastructure projects like the Mumbai Metro and Eastern Express Highway enhances connectivity, aligning with the company's focus on urban redevelopment.
- The Department of Telecom has penalized **Bharti Airtel**. The penalty is Rs 6.48 lakh. It is for violating subscriber verification rules in Assam. The violation relates to a consumer application form audit. The audit was for the quarter ending March 2025. Bharti Airtel disagrees with the notice.
- **Biocon** said that its subsidiary Biocon Biologics has received a notice of compliance (NOC) for Yesafili (afibercept), a biosimilar to Eylea (afibercept) injection, in vial and prefilled syringe presentations, from Health Canada.
- **Deepak Builders** announced a fresh infrastructure contract win from the Haryana government - Rs. 142 crore project in Karnal.
- **Kaynes Technology India** incorporated a wholly-owned subsidiary, Kaynes Space Technology (KSTPL) to develop satellites of all classes.
- Ahluwalia Contracts (India) announced that it has secured two major construction orders with a combined value of Rs 1,103.56 crore.
- **Diamond Power Infrastructure** announced the re-commissioning of its extra high voltage (EHV) testing laboratory to meet the dynamic needs of India's power sector.
- **Reliance Industries'** RISE Worldwide partners with Denmark's BLAST ApS. They are creating Jio BLAST eSports. This joint venture will tap into India's growing eSports market. The partnership aims to operate gaming events. It will bring BLAST's global events to India. Events will be hosted on the JioGames platform. The JV will offer tournament management and marketing services.
- **HCLTechnologies** announced that it has expanded its partnership with cloud computing major Salesforce. The companies collaborated for enterprise adoption of agentic artificial intelligence (AI) services.
- **Power Mech Projects Ltd** announced that it has received solar power contracts worth about Rs. 159 Crore from Bihar State Power Generation Company Limited (BSPGCL). The order is for setting-up grid-connected distributed solar power plants. The order is received under the PM-KUSUM Scheme.
- **Paisalo Digital** announced that it has entered into a co-lending loan arrangement for SME products with the State Bank of India (SBI).

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

Global News

- China's industrial profits dropped by 1.1% year-on-year to CNY 2,720.43 billion in the first five months of 2025, reversing a 1.4% gain in the January-April period. In May alone, industrial profits shrank by 9.1% yoy, swinging from a 3.0% increase in April and marking the first fall in three months.
- Eurozone economic sentiment indicator edged down to 94 in June 2025 from 94.8 in May. The consumer confidence indicator edged down by 0.2 points to -15.3 in June 2025 from -15.1 in May.
- France's annual inflation rate rose to 0.9% in June 2025, hold at May's over four-year low of 0.7%, preliminary estimates showed. On a monthly basis, the CPI rose 0.3%, rebounding from a 0.1% drop in May.
- France's producer prices decreased by 0.8% month-over-month in May 2025, easing from a revised 4.2% decline in the previous month. On a yearly basis, producer prices rose by 0.2% in May, rebounding from a revised 0.7% fall in April.
- Japan's retail sales increased by 2.2% year-on-year in May 2025, down from an upwardly revised 3.5% rise in the previous month. On a monthly basis, retail sales fell by 0.2% in May, reversing an upwardly revised 0.7% gain in April.
- Japan's unemployment rate held steady at 2.5% in May 2025 for the third consecutive month. The number of unemployed fell by 40 thousand to a three-month low of 1.72 million, while employment rose by 33 thousand to a record high of 68.37 million.

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

Economic News

- Crude Oil traded at US\$ 65.49/bbl (IST 17:00).
- INR strengthened to Rs. 85.48 from Rs. 85.70 against each US\$ resulting in daily change of 0.26%.
- India has imposed anti-dumping duties on plastic processing machines imported from China and Taiwan for five years, starting July 3. The decision follows a recommendation from the Directorate General of Trade Remedies, aimed at protecting the domestic industry from unfair trade practices. In a related move, India recently imposed anti-dumping duties on four chemicals imported from China, as part of broader efforts to promote domestic manufacturing and reduce reliance on Chinese imports. India's trade deficit with China widened to USD 92.2 billion in FY 2024-25. During the same period, India's exports to China fell 14% to USD 14.25 billion, down from USD 16.66 billion in FY 2023-24. Meanwhile, imports from China rose 11.52% to USD 113.45 billion, up from USD 101.73 billion the previous fiscal year.
- Indian trade negotiators are in Washington for talks on an interim trade deal with the US before the July 9 deadline. India aims to protect its interests in agriculture and dairy while seeking concessions for labor-intensive sectors. Discussions will also address the impact of US tariffs on steel, aluminum, and auto imports, as India seeks similar concessions to other nations.
- The government is actively addressing hurdles in major infrastructure projects across Jharkhand, Sikkim, Nagaland,

Assam, and Arunachal Pradesh. A recent review, led by DPIIT Secretary Amardeep Singh Bhatia, tackled 18 issues in Jharkhand projects worth Rs 34,213 crores and other projects in northeastern states.

- Domestic natural gas price will increase to \$6.75 per mmbtu next month. This rise links to crude prices, which surged due to the Iran conflict. The Centre revises this rate monthly based on the average crude price. Prices have mostly remained at the ceiling since April 2023, benefiting gas producers.
- The Union Cabinet likely approved waiving penalties and most interest on overdue spectrum payments. This benefits central and state government departments. These departments include police, defence, and Prasar Bharti. The waiver covers roughly 95% of interest dues and penalties. Departments will pay the principal amount plus 5% interest.

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

Forthcoming Events

Board Meetings as on 28/06/2025

AU Small Finance Bank Limited	Fund Raising
PAKKA LIMITED	Financial Results

Board Meetings as on 30/06/2025

Astec LifeSciences Limited	Fund Raising
Bannari Amman Spinning Mills Limited	Fund Raising
Capri Global Capital Limited	Fund Raising
Jaiprakash Associates Limited	Financial Results
Rashtriya Chemicals and Fertilizers Limited	Fund Raising
The Federal Bank Limited	Fund Raising
Transwarranty Finance Limited	Fund Raising

(Source: NSE)

Corporate Actions as on 30/06/2025

Dalmia Bharat Sugar and Industries Limited	Dividend - Rs 1.50 Per Share
GVP Infotech Limited	Rights 13:100 @ Premium Rs 8/-
The Indian Hotels Company Limited	Dividend - Rs 2.25 Per Sh

(Source: NSE)

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