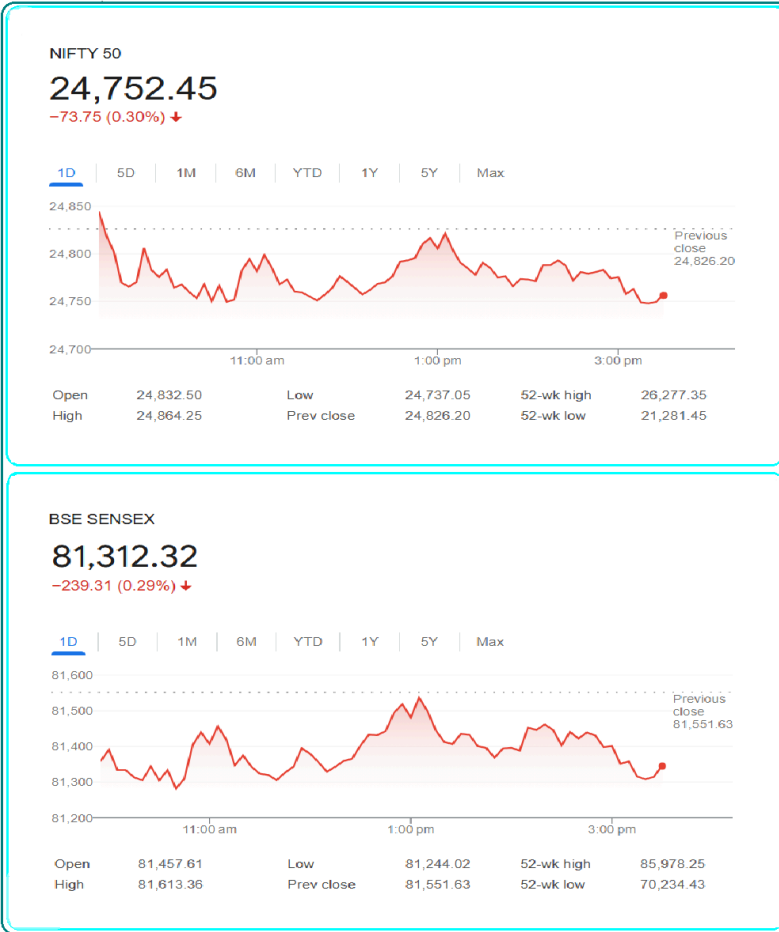


Index Chart



(Source: [Bloomberg](#))

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	24752.45	24826.20	-0.30%
S&P BSE SENSEX	81312.32	81551.63	-0.29%
NIFTY MID100	57141.40	57154.50	-0.02%
NIFTY SML100	17784.00	17725.15	0.33%

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

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	55417.00	55352.80	0.12%

Market Wrap Up

- The domestic equity benchmarks ended with minor losses today as investor sentiment remained cautious despite firm cues from Asian peers. Concerns over rising US Treasury yields and escalating trade tensions between the US and the EU weighed on the domestic market. The Nifty closed below the 24,800 level.
- The S&P BSE Sensex slipped 239.31 points or 0.29% to 81,312.32. The Nifty 50 index fell 73.75 points or 0.30% to 24,752.45.
- The S&P BSE Mid-Cap index shed 0.22% and the S&P BSE Small-Cap index added 0.50%.
- Among the sectoral indices, the Nifty Media index (up 1.04%), the Nifty PSU Bank index (up 0.97%) and the Nifty Oil & Gas index (up 0.03%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty FMCG index (down 1.49%), the Nifty Auto index (down 0.68%) and the Nifty Pharma index (down 0.61%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Derivative Watch

- Nifty **June** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **31364** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **BHARTIARTL, ICICIBANK, ADANI PORTS**.
- Short** position build up for the **June** series has been witnessed in **RELIANCE, LT, ONGC, SBIN, HDFCBANK, INFY, CESC**.

(Source: Capitaline F&O)

NIFTY AUTO	23437.05	23596.90	-0.68%
NIFTY FMCG	55703.85	56547.60	-1.49%
NIFTY IT	37465.75	37501.45	-0.10%
NIFTY METAL	9239.50	9294.95	-0.60%
NIFTY PHARMA	21393.30	21524.95	-0.61%
NIFTY REALTY	944.90	946.30	-0.15%
BSE CG	70430.91	70168.15	0.37%
BSE CD	58412.02	58751.00	-0.58%
BSE Oil & GAS	27301.14	27261.33	0.15%
BSE POWER	6810.72	6824.45	-0.20%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	37722.40	37724.11	0.00%
HANG SENG	23258.31	23381.99	-0.53%
STRAITS TIMES	3911.92	3896.09	0.41%
SHANGHAI	3339.93	3340.69	-0.02%
KOSPI	2670.15	2637.22	1.25%
JAKARTA	7175.82	7198.97	-0.32%
TAIWAN	21357.72	21336.54	0.10%
KLSE COMPOSITE	1523.48	1526.16	-0.18%
ALL ORDINARIES	8624.90	8631.50	-0.08%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	112538.56	119285.46
NSE F&O	364322.90	431025.33

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	4662.92
NET SELL	-

(Source: [NSE](#))

Corporate News

- **Bosch Limited** posted a 16% year-on-year growth in its revenue at Rs. 5,233 Crore. Revenue registered an upside of 14.90% on a sequential basis. On the other hand, the Beyond Mobility segment posted a growth of 1.70%.
- **Life Insurance Corporation of India** reported a 38% rise in its net profit for the fourth quarter ending March 2025, reaching Rs 19,013 crore. This marks a rise of 38% from the Rs 13,763 crore net profit recorded during the same quarter in the previous fiscal year. Total income for the quarter fell to Rs 241,625 crore, compared to Rs 250,923 crore during the corresponding period last year. The company's board has recommended a final dividend of Rs 12 per share.
- **Bharat Dynamics** reported a 5.54% decline in net profit to Rs 272.77 crore, despite a 108.05% surge in total revenue from operations to Rs 1,776.98 crore in Q4 FY25 compared with Q4 FY24.
- **Granules India** posted net profit declined 3.26% to Rs 94.05 crore in the quarter ended March 2025 as against Rs 97.22 crore during the previous quarter ended March 2024. Sales declined 21.75% to Rs 730.46 crore in the quarter ended March 2025 as against Rs 933.47 crore during the previous quarter ended March 2024.
- **JK Lakshmi Cement** reported a 3.08% decline in standalone net profit to Rs 137.96 crore in Q4 FY25 as against Rs 142.35 crore posted in the same quarter last year. Revenue increased by 5.52% year-on-year (YoY) to Rs 1,738.82 crore in the fourth quarter.
- **EID Parry (India)** reported a 30.05% jump in consolidated net profit to Rs 286.52 crore on a 22.57% rise in net sales to Rs 6,811.12 crore in Q4 March 2025, compared to the same period last year.
- **Triveni Engineering & Industries** posted consolidated net profit rose 13.63% year-on-year (YoY) to Rs 183 crore in Q4 FY25, compared to Rs 161.04 crore in Q4 FY24. Revenue from operations (excluding excise duty) grew 25.12% YoY to Rs 1,629.29 crore during the quarter ended 31 March 2025.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
HDFCLIFE	789.45	775.80	1.76%
BEL	390.45	385.40	1.31%
BAJFINANCE	9267.50	9171.00	1.05%
BHARTIARTL	1856.10	1843.80	0.67%
HEROMOTOCO	4362.20	4338.20	0.55%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
ITC	420.20	433.90	-3.16%
INDUSINDBK	805.15	820.70	-1.89%
NESTLEIND	2419.00	2460.90	-1.70%
APOLLOHOSP	6956.50	7073.50	-1.65%
ULTRACEMCO	11238.00	11421.00	-1.60%

(Source: [Moneycontrol](#))

- **Shilpa Medicare** posted consolidated net profit fell 40.77% to Rs 14.51 crore while revenue from operations rose 13.40% to Rs 330.80 crore in Q4 FY25 over Q4 FY24.
- **Procter & Gamble Hygiene & Health Care** posted net profit declined 41.88% to Rs 156.10 crore, while revenue from operations dropped 20.52% to Rs 991.63 crore in Q4 FY25 over Q3 FY25.
- **NMDC** posted net sales at Rs 6,953.13 crore in March 2025 up 7.38% from Rs. 6,475.27 crore in March 2024. Net profit at Rs. 1,496.16 crore in March 2025 up 2.33% from Rs. 1,462.03 crore in March 2024.
- **PTC India** posted net sales at Rs 2,856.03 crore in March 2025 down 14.28% from Rs. 3,331.98 crore in March 2024. Net profit at Rs. 521.38 crore in March 2025 up 528.93% from Rs. 82.90 crore in March 2024.
- **KEC International** posted net sales at Rs 6,048.02 crore in March 2025 up 14.07% from Rs. 5,301.81 crore in March 2024. Net profit at Rs. 160.68 crore in March 2025 up 72.9% from Rs. 92.93 crore in March 2024.
- **ITI** posted consolidated net loss narrowed to Rs 4.38 crore in Q4 FY25, compared with net loss of Rs 238.82 crore in Q4 FY24. Revenue from operations jumped 73.9% YoY to Rs 1,045.70 crore in Q4 FY25.
- **ACME Solar Holdings** has commissioned the first phase of 26.4 MW of its maiden 50 MW wind power project in Shapar, Gujarat. With this, the company's total operational capacity has increased to 2,731.4 MW from 2,705 MW earlier.
- **HBL Engineering** said that it has received letter of acceptances (LoA) from IRCON International for provision of the Kavach in Bangalore and Mysore divisions of South Western Railway, across 85 stations covering 778 kilometers and two locomotives.
- **Zyudus Lifesciences** announced that the U.S. Food and Drug Administration (USFDA) has granted Fast Track Designation to Usnoflast (ZYIL1), a novel oral NLRP3 inhibitor, for the treatment of Amyotrophic Lateral Sclerosis (ALS).
- **AU Small Finance Bank** has made a significant move by acquiring an entire commercial tower in Mumbai for over Rs 371 crore. This purchase from Earth Worth Constructions marks the largest outright office deal by a financial institution this year. The bank intends to establish its corporate office in the 11-story property, previously leased by UPL Ltd.
- **BC Jindal group** secured a 150 MW Round-the-Clock project from Solar Energy Corporation of India Limited. The project was won at a tariff of Rs 5.07/kWh. Jindal India Renewable Energy recently won two 300 MW solar plus storage projects. The group plans to invest \$2.5 billion in renewable energy by 2030.

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

Global News

- U.S. durable goods orders tumbled by 6.3 percent in April after surging by a downwardly revised 7.6 percent in March. Core durable goods orders rose by 0.2 percent in May after dipping by 0.2 percent in April.
- U.S. house price index fell by 0.1% in March 2025. On a yearly basis, home prices rose 3.7%, easing from a 3.9% gain in February.
- U.S. consumer confidence index spiked to 98.0 in May after plunging to a downwardly revised 85.7 in April.
- U.S. aggregate M2 money supply estimated by the Federal Reserve rose to 21.86 trillion in April of 2025.
- Germany's seasonally adjusted unemployment rate held steady at 6.3% in May, the highest since September 2020. However, the number of unemployed rose by 34,000 to 2.963 million.
- Germany's import prices unexpectedly fell by 0.4% year-on-year in April 2025, reversing a 2.1% gain in March. On a monthly basis, import prices fell 1.7% in April, following a 1.0% decrease in March.
- French economy expanded 0.1% qoq in Q1 of 2025, reversing a 0.1% contraction in Q4. On an annual basis, GDP grew 0.6%.
- French payroll employment in the private sector edged down by 0.1% in the first quarter of 2025, with a decline of 28,700 jobs to 20.98 million.
- French producer prices fell by 4.3% month-over-month in April 2025, following a downwardly revised 0.5% drop in the previous month. On a yearly basis, producer prices dropped by 0.8% in April 2025, compared to a downwardly revised 0.2% fall in the previous month.

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

Economic News

- Crude Oil traded at US\$ 61.84/bbl (IST 17:00).
- INR weakened to Rs. 85.36 from Rs. 85.33 against each US\$ resulting in daily change of 0.04%.
- India's industrial output grew 2.7% year-on-year in April, down from 3.9% in March. Manufacturing rose 3.4% in April as against 3% in the previous month, while electricity growth slowed to 1.1% from 6.3% in March. Mining contracted by 0.2% in April from an expansion of 0.4% a month ago.
- U.S. and Indian officials are engaged in trade talks, aiming for an interim agreement by June 25, potentially suspending the 26% reciprocal tariff imposed by the US. Both nations are working towards a broader bilateral trade agreement by the fall, with the goal of significantly increasing bilateral trade to \$500 billion by 2030.
- MoSPI advocates for monitoring credit access program impact in upcoming surveys to bolster enterprise formalization

and financial inclusion. The ministry suggests incorporating questions on renewable energy investments in the CAPEX survey. CEA emphasizes granular data's importance for sustaining policy reform, highlighting ASUSE and CAPEX surveys' role in depicting private sector activity.

- India's FDI equity inflow experienced a 24.5% on-year decline in January-March FY25, reaching \$9.34 billion. However, overall FDI equity inflows for FY25 rose by 13% to \$50 billion. Total FDI surged 14% to \$81.04 billion, marking a three-year high, with the services sector leading as the top recipient and Maharashtra attracting the highest share of inflows.
- India anticipates its goods and services exports to hit \$1 trillion by fiscal year 2026. This growth is supported by new trade agreements and the resumption of shipments via the Red Sea route. Federation of Indian Export Organisations projects increases in merchandise and service exports. Key sectors driving this growth include electronics, agriculture, and petroleum products.
- The government has earmarked Rs 18,233 crore for the RoDTEP export scheme in FY26. This will cover over 10,750 product categories. Benefits are restored for goods manufactured in special economic zones and export-oriented units from June 1. The scheme refunds duties and taxes to exporters. This move aims to boost India's trade growth and create a competitive export environment.

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

Forthcoming Events

Board Meetings as on 29/05/2025

Bajaj Auto Limited	Financial Results/Dividend
Alkem Laboratories Limited	Financial Results/Dividend
Engineers India Limited	Financial Results/Dividend
Bajaj Hindusthan Sugar Limited	Financial Results
Amara Raja Energy & Mobility Limited	Financial Results/Dividend
Global Vectra Helicorp Limited	Financial Results
GE Power India Limited	Financial Results/Dividend
Motherson Sumi Wiring India Limited	Bonus
DCM Shriram Industries Limited	Financial Results/Dividend
Concord Biotech Limited	Financial Results/Dividend
Airo Lam limited	Financial Results
Antony Waste Handling Cell Limited	Financial Results
Apex Frozen Foods Limited	Financial Results/Dividend
Arman Financial Services Limited	Financial Results
Asian Granito India Limited	Financial Results
BF Utilities Limited	Financial Results
Campus Activewear Limited	Financial Results/Dividend
Century Plyboards (India) Limited	Financial Results/Dividend
Coffee Day Enterprises Limited	Financial Results
Confidence Petroleum India Limited	Financial Results/Dividend

Essar Shipping Limited	Financial Results
Gujarat Pipavav Port Limited	Financial Results/Dividend
ICRA Limited	Financial Results/Dividend
IFB Agro Industries Limited	Financial Results
India Tourism Development Corporation Limited	Financial Results/Dividend
IPCA Laboratories Limited	Financial Results/Dividend
Isgec Heavy Engineering Limited	Financial Results/Dividend
Jubilant Agri and Consumer Products Limited	Financial Results
Kitex Garments Limited	Financial Results/Dividend
KNR Constructions Limited	Financial Results/Dividend
Kohinoor Foods Limited	Financial Results/Dividend
Landmark Cars Limited	Financial Results/Dividend
Lemon Tree Hotels Limited	Financial Results
Lotus Eye Hospital and Institute Limited	Financial Results
Lumax Auto Technologies Limited	Financial Results/Dividend
Mazagon Dock Shipbuilders Limited	Financial Results/Dividend
Mazda Limited	Financial Results/Dividend
McLeod Russel India Limited	Financial Results
Mrs. Bectors Food Specialities Limited	Financial Results/Dividend
Mstc Limited	Financial Results/Dividend
NBCC (India) Limited	Financial Results/Dividend
Ola Electric Mobility Limited	Financial Results
Peninsula Land Limited	Financial Results
Popular Vehicles and Services Limited	Financial Results
Prestige Estates Projects Limited	Financial Results/Dividend/Fund Raising
Procter & Gamble Health Limited	Financial Results/Dividend
Samhi Hotels Limited	Financial Results
Samvardhana Motherson International Limited	Financial Results/Bonus/Dividend/Fund Raising
Sanwaria Consumer Limited	Financial Results
Senco Gold Limited	Financial Results/Dividend
Shalby Limited	Financial Results/Dividend
SJVN Limited	Financial Results/Dividend/Fund Raising
Sobha Limited	Financial Results/Dividend
Sreeleathers Limited	Financial Results/Voluntary Delisting
Suzlon Energy Limited	Financial Results
Thirumalai Chemicals Limited	Fund Raising
Udayshivakumar Infra Limited	Financial Results
Varroc Engineering Limited	Financial Results/Dividend/Fund Raising
Welspun Living Limited	Financial Results/Dividend
Wockhardt Limited	Financial Results/Fund Raising

(Source: NSE)

Corporate Actions as on 29/05/2025

POWERGRID Infrastructure Investment Trust	Distribution - Rs 3 Per Unit Consists Of Interest- Rs 1.67 Per Unit/Total Dividend - Re 0.57 Per Unit/Repayment Of Spv Debt- Re 0.75 Per Unit/Treasury Income Re 0.01 Per Unit
TATA CONSUMER PRODUCTS LIMITED	Dividend - Rs 8.25 Per Share

(Source: NSE)

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