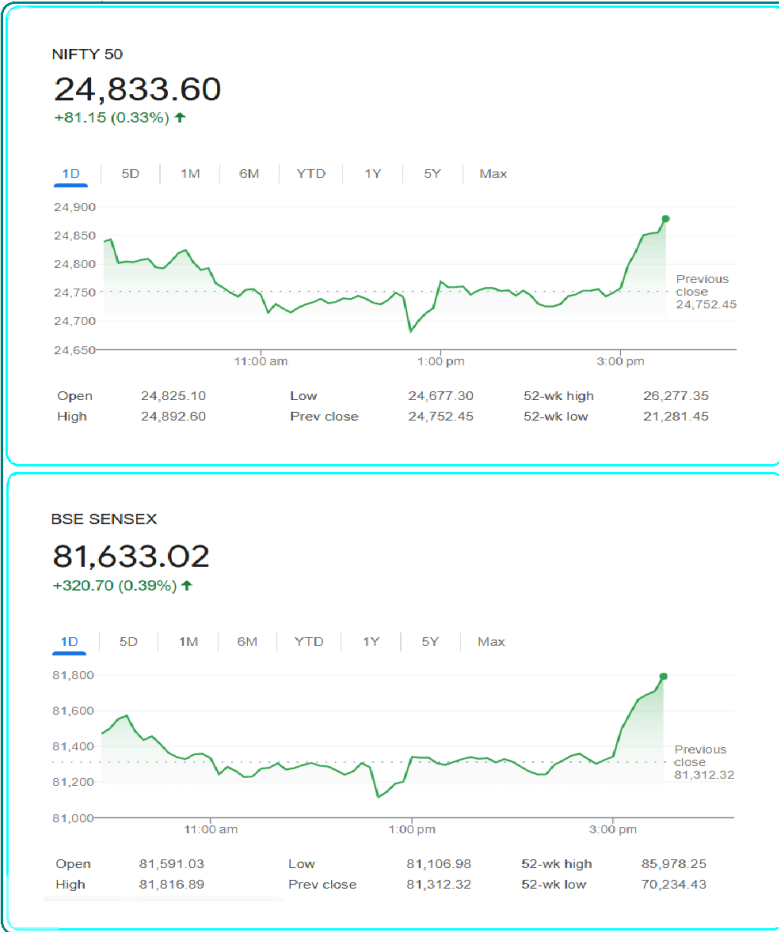


Index Chart



(Source: [Bloomberg](#))

Indian Markets

| Indices | Close | Previous | Change(%) |
|---------------------------|----------|----------|--------------|
| NIFTY 50 | 24833.60 | 24752.45 | 0.33% |
| S&P BSE SENSEX | 81633.02 | 81312.32 | 0.39% |
| NIFTY MID100 | 57457.25 | 57141.40 | 0.55% |
| NIFTY SML100 | 17889.40 | 17784.00 | 0.59% |

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

Sectoral Indices

| Indices | Close | Previous | Change(%) |
|-------------------|----------|----------|--------------|
| NIFTY BANK | 55546.05 | 55417.00 | 0.23% |

Market Wrap Up

- The domestic equity benchmarks ended with moderate gains today, snapping a two-day losing streak, supported by positive cues from broader Asian markets and firm Wall Street futures. Investor sentiment was lifted after a U.S. federal court blocked former President Donald Trump's proposed Liberation Day tariffs. The market was volatile due to the monthly expiry of the Nifty F&O series today. The Nifty closed above the 24,800 level.
- The S&P BSE Sensex added 320.70 points or 0.39% to 81,633.02. The Nifty 50 index rose 81.15 points or 0.33% to 24,833.60.
- The S&P BSE Mid-Cap index rose 0.48% and the S&P BSE Small-Cap index added 0.39%.
- Among the sectoral indices, the Nifty Metal index (up 1.21%), the Nifty Realty index (up 1.14%) and the Nifty Pharma index (up 0.92%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty PSU Bank index (down 0.24%), the Nifty FMCG index (down 0.13%) and the Nifty consumer Durables index (up 0.15%) 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 **19053** contracts at the end of the day.
- Long** position build up for the **June** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **HDFCBANK**, **INFY**.
- Short** position build up for the **June** series has been witnessed in **BAJFINANCE**, **GAIL**, **INOXWIND**, **POLYCAB**.

(Source: Capitaline F&O)

| | | | |
|---------------|----------|----------|--------|
| NIFTY AUTO | 23555.75 | 23437.05 | 0.51% |
| NIFTY FMCG | 55630.45 | 55703.85 | -0.13% |
| NIFTY IT | 37754.15 | 37465.75 | 0.77% |
| NIFTY METAL | 9351.65 | 9239.50 | 1.21% |
| NIFTY PHARMA | 21589.35 | 21393.30 | 0.92% |
| NIFTY REALTY | 955.70 | 944.90 | 1.14% |
| BSE CG | 70650.15 | 70430.91 | 0.31% |
| BSE CD | 58548.19 | 58412.02 | 0.23% |
| BSE Oil & GAS | 27320.42 | 27301.14 | 0.07% |
| BSE POWER | 6826.20 | 6810.72 | 0.23% |

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

Asia Pacific Markets

| Indices | Close | Previous | Change (%) |
|----------------|----------|----------|------------|
| NIKKEI225 | 38432.98 | 37722.40 | 1.88% |
| HANG SENG | 23573.38 | 23258.31 | 1.35% |
| STRAITS TIMES | 3916.84 | 3911.92 | 0.13% |
| SHANGHAI | 3363.45 | 3339.93 | 0.70% |
| KOSPI | 2720.64 | 2670.15 | 1.89% |
| JAKARTA | CLOSED | 7175.82 | - |
| TAIWAN | 21347.30 | 21357.72 | -0.05% |
| KLSE COMPOSITE | 1518.98 | 1523.48 | -0.30% |
| ALL ORDINARIES | 8637.80 | 8624.90 | 0.15% |

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

| Market | Current | Previous |
|----------|-----------|-----------|
| NSE Cash | 107376.52 | 112538.56 |
| NSE F&O | 349304.48 | 364322.90 |

(Source: [NSE](#))

FII Activities (Crores)

| ACTIVITIES | Cash |
|------------|--------|
| NET BUY | 884.03 |
| NET SELL | - |

(Source: [NSE](#))

Corporate News

- Indian Railway Catering and Tourism Corporation Limited** posted a net profit of Rs. 358 Crore. The company said that its net profit registered a growth of 26% on a year-on-year basis against Rs. 284 Crore in the previous corresponding period. IRCTC logged a revenue of Rs. 1,269 Crore during the quarter ended March 2025. In the same quarter of previous year, the business posted a revenue of Rs. 1,152 Crore.
- Bata India Limited** announced that its net profit slipped about 27.70% on a year-on-year basis to Rs. 46 Crore. In the previous corresponding period, the business posted a net profit of Rs. 63.60 Crore. Revenue was 1.2% lower than the previous year. Its revenue stood at Rs. 788.20 Crore versus Rs. 797.80 Crore in the previous corresponding period.
- Cummins India** has reported 7% fall in standalone net profit to Rs 521 crore on a 6% rise in total sales to Rs 2,414 crore in Q4 FY25 as compared with Q4 FY24. Domestic sales added up to Rs 1,935 crore (up 1% YoY) and export sales aggregated to Rs 479 crore (up 39% YoY) for the period under review.
- NMDC Limited** logged an 8% increase in revenue for the quarter ended March 2025. It stated that revenue from operations jumped to Rs. 7,004.60 Crore in the fourth quarter. In the previous corresponding quarter, the business logged a revenue of Rs. 6,489 Crore. Net profit of Rs. 1,483.40 Crore in the quarter ended March 2025. In the year-ago period, the business logged a net profit of Rs. 1,416 Crore.
- Natco Pharma** posted consolidated net profit increased 5.3% to Rs 406.60 crore on 14.3% jump in revenue from operations to Rs 1,221 crore in Q4 FY25 over Q4 FY24.
- Steel Authority of India** posted standalone net profit advanced 16.49% to Rs 1,177.96 crore, while revenue from operations rose 4.86% to Rs 29,316.08 crore in Q4 March 2025 over Q4 March 2024.
- Info Edge (India) Ltd** posted multi-fold jump in its consolidated net profit at Rs. 463.3 crore for the fourth quarter of 2024-25, as against Rs. 60.3 crore in the corresponding period of last year. Revenue reported an

Top Gainers

| SCRIP NAME | Close | Previous | Change (%) |
|-------------|---------|----------|------------|
| INDUSINDBK | 824.15 | 805.15 | 2.36% |
| SUNPHARMA | 1699.80 | 1666.40 | 2.00% |
| ADANI PORTS | 1438.60 | 1411.00 | 1.96% |
| ETERNAL | 228.37 | 224.18 | 1.87% |
| TRENT | 5657.00 | 5559.00 | 1.76% |

(Source: [Moneycontrol](#))

Top Losers

| SCRIP NAME | Close | Previous | Change (%) |
|------------|---------|----------|------------|
| HDFCLIFE | 780.90 | 789.45 | -1.08% |
| TATACONSUM | 1109.80 | 1121.40 | -1.03% |
| BEL | 386.80 | 390.45 | -0.93% |
| JIOFIN | 287.85 | 290.35 | -0.86% |
| BAJFINANCE | 9204.00 | 9267.50 | -0.69% |

(Source: [Moneycontrol](#))

- **Reliance Power's** arm, Reliance NU Energies, has secured a 350 MW solar power project with a 175 MW/700 MWh Battery Energy Storage System from SJVN. This addition will significantly boost Reliance Power's clean energy portfolio, positioning it as a leader in integrated solar and BESS solutions with a total clean energy pipeline of 2.
- **Vedanta Ltd's** demerger plans received a boost as the NCLAT granted an interim stay on the NCLT's rejection of the scheme, leading to a slight increase in Vedanta shares. The company is restructuring its business by spinning off its aluminium, oil & gas, power, and steel divisions into separate listed entities.
- **PNC Infratech** has completed over 90 infrastructure projects across 13 states. The company has demonstrated substantial growth between FY15 and FY24, with revenue, EBITDA, and profit after tax increasing significantly. Recently, PNC Infratech finalized the stake sale in 10 road assets to Highways Infrastructure Trust, aligning with its capital recycling strategy.

increase of 14% YoY to Rs. 749.6 crore.

- **Varroc Engineering** reported consolidated net profit of Rs 20.57 crore in Q4 FY25 as against net loss of Rs 47.43 crore posted in Q3 FY25. Revenue registering a 5.84% YoY increase, while income from other segments came in at Rs 63.58 crore, up 23.09% YoY during the same period.
- **Deepak Nitrite** posted consolidated net profit surged 106.35% to Rs 202.41 crore on 14.52% increase in revenue from operations to Rs 2,179.69 crore in Q4 FY25 over Q3 FY25. On year on year (YoY) basis, the company's consolidated revenue jumped 2.5%, while net profit declined 20.3% in Q4 FY25.
- **Welspun Corp** posted consolidated net profit surged 160.09% to Rs 698.31 crore, despite a 12.01% fall in revenue from operations to Rs 3,924.97 crore in Q4 FY25 over Q4 FY24.
- **HeidelbergCement India Ltd** announced its results for the quarter ended March 2025 and posted a 3% decline in its net profit. The business reported a net profit of Rs. 50 Crore. In the previous corresponding period, the business logged a net profit of Rs. 52 Crore. Revenue increased 2.70% to Rs. 612.40 Crore in Q4FY25. In the previous corresponding period, the business posted a revenue of Rs. 597 Crore.
- **Texmaco Rail & Engineering** has been awarded a wagon-supply contract worth Rs 140.55 crore by the Railway Board, Ministry of Railways.
- **TVS Motor Company** announced the launch of the TVS Jupiter 125 Dual Tone SmartXonnect™ (SXC), the latest variant in the successful TVS Jupiter line-up. Built to deliver Zyada - more style, more features, and more value, the new scooter stays true to the brand's promise of "Har 125cc Scooter Se Zyada."
- **Sterling and Wilson Renewable Energy** announced it emerged as the lowest (L1) bidder for a 225 MW (AC) solar EPC project in Gujarat, floated by a reputed PSU developer.

- **ACME Solar Holdings** has started the first part of its wind power project in Shapar, Gujarat. This adds 26.4 MW to their capacity. The project uses Envision turbines and connects to a substation with a dedicated line. ACME will sell the power to Gujarat Urja Vikas Nigam Ltd under a 25-year agreement. ACME's total operational capacity is now 2,731.4 MW.
- **Oil India Ltd** has been declared the preferred bidder for the Jorkian-Satipura-Khunja Amalgamated Potash and Halite block in Hanumangarh District of Rajasthan. The block was offered as a part of fifth successful round of auctions of 'critical mineral' blocks by the Ministry of Mines.
- **Aurobindo Pharma** said that its wholly owned subsidiary, Curateq Biologics has incorporated a new wholly owned subsidiary (WOS) in the Netherlands by the name of CuraTeQ Biologics B.V.
- **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.
- **Waaree Energies** announced that its wholly owned subsidiary, Waaree Solar Americas, has secured an order worth \$176 million from a prominent U.S.-based client.

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

Global News

- The Bank of Korea unanimously decided to cut the Base Rate by 25 basis points to 2.50%.
- Singapore's Domestic Supply Price Index dropped 1.1% year-on-year in April 2025, reversing a downwardly revised 3.6% rise in the previous month. On a monthly basis, the Domestic Supply Price Index shrank 0.8%, following an upwardly revised 2.2% drop in March.

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

Economic News

- Crude Oil traded at US\$ 62.17/bbl (IST 17:00).
- INR weakened to Rs. 85.51 from Rs. 85.36 against each US\$ resulting in daily change of 0.18%.
- The Reserve Bank of India's net income surged by 27.3% to Rs 2.69 lakh crore in the financial year ending March 2025 from Rs 2.11 lakh crore in the previous year. India's central bank saw a gain of Rs 11.1 lakh crore from foreign exchange transactions during the year versus Rs 8.36 lakh crore last year.
- ICICI Bank projects India's economy to grow by 7% in Q4FY25. This growth is due to increased government spending and

rising rural demand. Overall GDP growth for FY25 is expected to be 6.3%. Rural areas are likely to perform well, supported by a good monsoon. Government spending will further boost growth.

- India has capped wheat stock limits to boost availability and control prices. Traders can hold up to 3,000 metric tons, while retailers are limited to 10 tons.
- The Prime Minister Narendra Modi-led Cabinet announced Minimum Selling Price for kharif crops for the 2025-26 marketing season, amid worries of above normal monsoon impacting the sowing season. The Cabinet approved hike in paddy MSP by Rs 69 per quintal to Rs 2,369 for 2025-26 Kharif season.

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

Forthcoming Events

Board Meetings as on 30/05/2025

| | |
|-------------------------------------|----------------------------|
| Apollo Hospitals Enterprise Limited | Financial Results/Dividend |
| AstraZeneca Pharma India Limited | Financial Results/Dividend |
| Ashiana Housing Limited | Financial Results/Dividend |
| Asian Hotels (East) Limited | Financial Results/Dividend |
| Ahluwalia Contracts (India) Limited | Financial Results/Dividend |
| Archies Limited | Financial Results |
| B. L. Kashyap and Sons Limited | Financial Results |
| Bajaj Holdings & Investment Limited | Financial Results/Dividend |
| Dalmia Bharat Limited | Fund Raising |
| Dharmaj Crop Guard Limited | Financial Results |
| DS Kulkarni Developers Limited | Financial Results |
| Easy Trip Planners Limited | Financial Results |
| Equitas Small Finance Bank Limited | Fund Raising |
| Fiem Industries Limited | Financial Results/Dividend |
| Greenlam Industries Limited | Financial Results/Dividend |
| GVK Power & Infrastructure Limited | Financial Results |
| Heubach Colorants India Limited | Financial Results |
| Ingersoll Rand (India) Limited | Financial Results/Dividend |
| Inox Green Energy Services Limited | Financial Results |
| Inox Wind Energy Limited | Financial Results |
| Inox Wind Limited | Financial Results |
| Jai Corp Limited | Financial Results/Dividend |
| Jamna Auto Industries Limited | Financial Results/Dividend |
| Kiri Industries Limited | Financial Results |
| La Opala RG Limited | Financial Results/Dividend |
| Lovable Lingerie Limited | Financial Results |

| | |
|---|--------------------------------|
| Max India Limited | Financial Results |
| Nagarjuna Fertilizers and Chemicals Limited | Financial Results |
| National Fertilizers Limited | Financial Results |
| Nectar Lifesciences Limited | Financial Results |
| Panacea Biotech Limited | Financial Results/Dividend |
| Pearl Polymers Limited | Financial Results |
| Pennar Industries Limited | Financial Results |
| PNC Infratech Limited | Financial Results/Dividend |
| PTC Industries Limited | Financial Results |
| Puravankara Limited | Financial Results |
| Rolex Rings Limited | Financial Results |
| Salasar Techno Engineering Limited | Financial Results |
| SML Isuzu Limited | Financial Results/Dividend |
| Spandana Sphoorty Financial Limited | Financial Results/Fund Raising |
| Sun TV Network Limited | Financial Results |
| TITAGARH RAIL SYSTEMS LIMITED | Financial Results/Dividend |
| Vedanta Limited | Fund Raising |
| Vodafone Idea Limited | Financial Results/Fund Raising |

(Source: NSE)

Corporate Actions as on 30/05/2025

| | |
|--|-----------------------------------|
| Bajaj Finance Limited | Dividend - Rs 44 Per Share |
| GlaxoSmithKline Pharmaceuticals Limited | Dividend - Rs 42 Per Share |
| Home First Finance Company India Limited | Dividend - Rs 3.70 Per Share |
| Infosys Limited | Dividend - Rs 22 Per Share |
| Jagran Prakashan Limited | Interim Dividend - Rs 6 Per Share |
| Caplin Point Laboratories Limited | Interim Dividend - Rs 3 Per Share |
| Ponni Sugars (Erode) Limited | Dividend - Rs 3 Per Share |
| S Chand And Company Limited | Interim Dividend - Rs 4 Per Share |
| Ujaas Energy Limited | Bonus 17:25 |
| UNO Minda Limited | Dividend - Rs 1.50 Per Share |

(Source: NSE)

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : helpdesk@shriraminsight.com | www.shriraminsight.com |