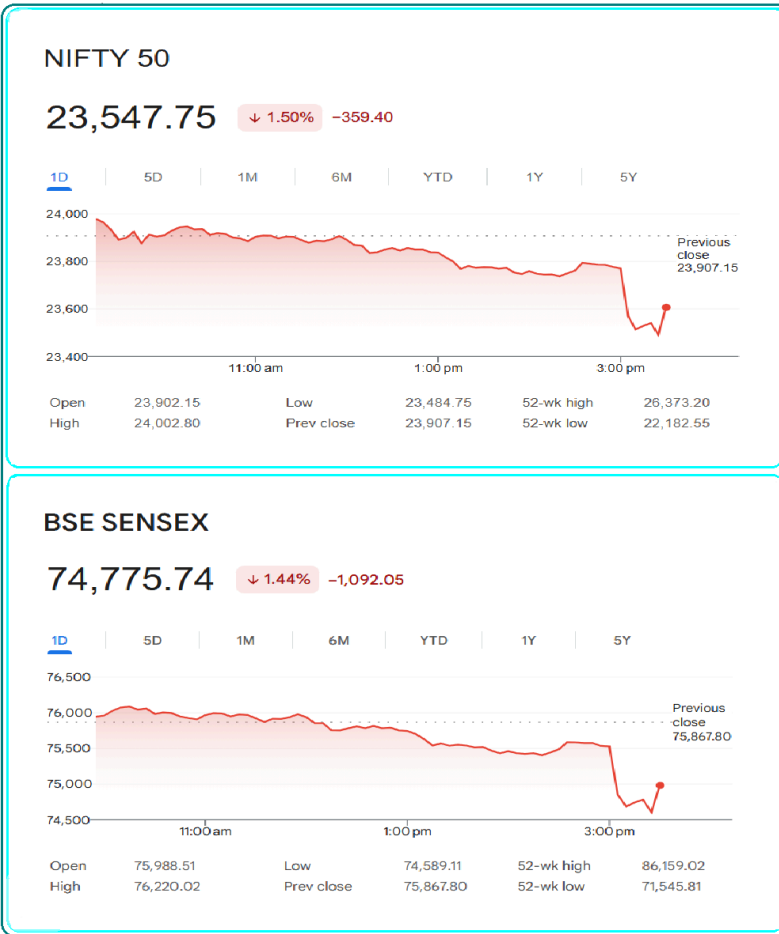


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23547.75	23907.15	<b>-1.50%</b>
<b>S&amp;P BSE SENSEX</b>	74775.74	75867.80	<b>-1.44%</b>
<b>NIFTY MID100</b>	61723.80	62558.85	<b>-1.33%</b>
<b>NIFTY SML100</b>	18138.80	18294.30	<b>-0.85%</b>

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

## Market Wrap Up

- The key equity benchmarks ended with sharp losses, extending declines for the third consecutive session, as cautious investor sentiment and profit booking weighed on the market. Escalating geopolitical tensions in the Middle East, particularly uncertainty surrounding developments involving Iran, kept investors risk-averse. Weakness in select heavyweight stocks and increased market volatility further dragged the benchmark indices lower. The Nifty settled below the 23,550 mark.
- The S&P BSE Sensex tanked 1,092.06 points or 1.44% to 74,775.74. The Nifty 50 index slipped 359.40 points or 1.50% to 23,547.75. In the three trading sessions, the Sensex and Nifty declined 2.23% and 2.01%, respectively. The BSE 150 MidCap Index fell 1.25% and the BSE 250 SmallCap Index declined 0.61%.
- Among the sectoral indices, the Nifty IT index (up 0.60%), the Nifty Private Bank index (down 1.17%), and the Nifty Media index (down 0.62%) outperformed the Nifty 50 index. Meanwhile, the Nifty Oil & Gas index (down 2.47%), the Nifty Metal index (down 2.02%) and the Nifty Auto index (down 1.96%) 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 **60249** contracts at the end of the day.
- **Long** position build up for the **June** series has been witnessed in **INFY, HCLTECH, TCS**.
- **Short** position build up for the **June** series has been witnessed in **RELIANCE, BHARTIARTL, SBIN, ICICIBANK, HDFCBANK**.
- **Unwinding** position for the **June** series has been witnessed in **COALINDIA, NHPC**.

(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	66329.50	64693.12	2.53%
HANG SENG	25182.39	25006.16	0.70%
STRAITS TIMES	5037.86	4989.19	0.98%
SHANGHAI	4068.57	4098.64	-0.73%
KOSPI	8476.15	8185.29	3.55%
JAKARTA	6127.38	6130.19	-0.05%
TAIWAN	44732.94	43636.44	2.51%
KLSE COMPOSITE	1683.07	1684.93	-0.11%
ALL ORDINARIES	8965.00	8819.60	1.65%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	287452.34	135899.66
NSE F&O	229486.40	124105.74

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	21105.86

(Source: [NSE](#))

## Corporate News

- Asian Paints Ltd** reported consolidated net profit rising 69.3% year-on-year to Rs 1,172.1 crore, aided by higher sales and improved margins. Net sales increased 10.8% to Rs 9,228.5 crore during the quarter ended March 31, 2026, compared with Rs 8,329.6 crore in the corresponding period last year. The company's board also recommended a final dividend of Rs 23 per equity share for FY26.
- Natco Pharma** reported a 34.11% year-on-year decline in consolidated net profit to Rs 267.9 crore in Q4 FY26, compared with Rs 406.6 crore posted in the corresponding quarter last year. Revenue from operations fell 39.46% YoY to Rs 739.1 crore in the quarter ended 31 March 2026.
- Alkem Laboratories** reported 25.11% drop in consolidated net profit to Rs 251.11 crore despite 14.62% jump in revenue from operations to Rs 3603.32 crore in Q4 March 2026 over Q4 March 2025. The company's board recommended a final dividend of Rs 10 per equity share.
- BEML** posted consolidated net profit declined 37.46% to Rs 179.82 crore in Q4 FY26, compared with Rs 287.55 crore in Q4 FY25. Revenue from operations increased 8.57% YoY to Rs 1,794.17 crore in Q4 FY26. The company's board declared the 2nd interim dividend of Rs 2.30 per equity share.
- Dish TV India** posted consolidated net sales at Rs 243.07 crore in March 2026 down 29.27% from Rs. 343.66 crore in March 2025. Net loss at Rs. 303.95 crore in March 2026 up 24.43% from Rs. 402.19 crore in March 2025.
- BLACK BOX** posted consolidated net sales at Rs 1,690.94 crore in March 2026 up 9.48% from Rs. 1,544.58 crore in March 2025. Net profit at Rs. 64.76 crore in March 2026 up 7.09% from Rs. 60.47 crore in March 2025.
- Diamond Power Infrastructure** posted consolidated net sales at Rs 695.87 crore in March 2026 up 108.46% from Rs. 333.81 crore in March 2025. Net profit at Rs. 60.61 crore in March 2026 up 690.89% from Rs. 7.66 crore in March 2025.
- Lemon Tree Hotels** reported an 8.09% rise in consolidated net profit to Rs 91.49 crore in Q4 FY26, compared with Rs 84.64 crore posted in the

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
TECHM	1483.90	1455.60	1.94%
HCLTECH	1183.80	1165.20	1.60%
WIPRO	204.25	201.58	1.32%
LT	4076.50	4047.50	0.72%
INFY	1160.90	1159.90	0.09%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
INDIGO	4405.00	4570.00	-3.61%
EICHERMOT	7177.00	7419.00	-3.26%
BAJAJ-AUTO	10460.00	10808.50	-3.22%
POWERGRID	290.55	300.15	-3.20%
ONGC	265.40	274.05	-3.16%

(Source: [Moneycontrol](#))

- **Zydus Therapeutics'** drug saroglitazar has received priority review from the US FDA. This drug treats primary biliary cholangitis, a liver disease. The company plans to launch saroglitazar in the US in the fourth quarter of fiscal year 2027.
- **Indoco Remedies** said its oral solid dosage formulations facility at Baddi, Himachal Pradesh, received European Union Good Manufacturing Practice (EU GMP) certification from the German Health Authority (Berlin)
- **Wockhardt** received regulatory approval for its breakthrough antibiotic Zaynich in India.
- **H.G. Infra Engineering** has been declared the successful bidder by REC Power Development and Consultancy (RECPDCL), a wholly owned subsidiary of REC.

corresponding quarter last year. Revenue from operations increased 10% year-on-year to Rs 416.40 crore during the quarter ended 31 March 2026.

- **Bata India** posted consolidated net profit tanked 95.20% to Rs 2.20 crore in Q4 FY26 as against Rs 45.91 crore in Q4 FY25. Revenue from operations rose 4.99% to Rs 827.62 crore in Q4 FY26 as against Rs 788.21 crore Q4 FY25. The board of Bata India has recommended a dividend of Rs 9 per share for FY 2025-26.
- **Indian Oil Corporation** has secured a significant crude oil purchase. The state refiner bought five million barrels from West Africa and the Middle East. This acquisition includes Angolan Kissanje and Nemba crude for its Paradip refinery. Nigerian Usan crude and Abu Dhabi's Murban crude were also purchased for delivery to Vadinar and Chennai refineries.
- The U.S. FDA has identified significant data integrity and manufacturing lapses at a **Dabur India** plant following a January inspection. Findings revealed risks of microbiological contamination, falsified records, and the presence of live birds and droppings in a raw material warehouse. Management also failed to review production records before batch release.
- **HBL Engineering** announced that it has secured a major order worth Rs 1,714 crore from Chittaranjan Locomotive Works (CLW) for the supply, installation, testing, and commissioning of On-board KAVACH Loco equipment (Version 4.0).
- **Wipro** announced an expanded partnership with ServiceNow to deploy agentic AI workflows across key enterprise functions, including IT, HR, procurement and cybersecurity.

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

## Global News

- U.S. initial jobless claims climbed to 215,000 in the week ended May 23rd, an increase of 5,000 from the previous week's revised level of 210,000. Continuing jobless claims rose by 15,000 to 1,786,000 on the second week of May.
- U.S. economy expanded an annualized 1.6% in Q1 2026, up from 0.5% in Q4 but below 2% in the advance estimate.

- U.S. durable goods jumped by 7.9% from the previous month to \$346 billion in April 2026, after an upwardly revised 1.3% rise in the prior month. Core durables goods rose by 1.1%, the same pace as in March.
- U.S. new home sales fell by 6.2% from the previous month to an annualized rate of 622,000 units in April of 2026.
- U.S. building permits increased 4.4% month-over-month to a seasonally adjusted annual rate of 1.423 million in April 2026.
- Eurozone Economic Sentiment Indicator (ESI) rose slightly to 93.5 in May 2026, remaining close to the over five-year low of 93.2 recorded in April. The consumer confidence was at -19 in May 2026, up from an over three-year low of -20.6 in April.
- Germany's import prices increased 5.3% year-on-year in April 2026, accelerating sharply from a 2.3% rise in the previous month. Monthly, import prices rose 1.2%, easing from March's 3.6% increase.
- France's economy contracted by 0.1% quarter-on-quarter in Q1 2026, reversing a 0.2% expansion in Q4. On a yearly basis, GDP expanded 0.9%, lower than initial estimates of 1.1% and slowing from 1.3% in Q4.
- France's annual inflation rate accelerated to 2.4% in May 2026, from 2.2% in April. Compared to the previous month, the CPI edged up 0.1%, following a 1% jump in April.
- French domestic producer prices fell 2.1% month-on-month in April 2026, reversing a revised 1.9% increase in March. On an annual basis, domestic producer prices jumped 2.1%, the most since June 2023, after being flat in March.
- French private payroll employment fell by 0.1% quarter-on-quarter, or 13,900 jobs, to 21.0 million in the first quarter of 2026, remaining unchanged from the previous quarter.
- Japan's unemployment rate fell to 2.5% in April 2026, below both market expectations and March's 2.7% reading.
- Japan retail sales grew 2.1% year-on-year in April 2026, following a downwardly revised 1.4% rise in the previous month. On a monthly basis, retail trade grew 1.3%, following a downwardly revised 1.0% gain in March.
- Japan's industrial production rose 0.8% mom in April 2026, reversing a 0.4% drop in the prior month. On an annual basis, output increased 2.3%, following a 2.4% rise in March.

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

## Economic News

- Crude Oil traded at US\$ 87.77/bbl (IST 17:00).
- INR strengthened to Rs. 95.04 from Rs. 95.70 against each US\$ resulting in daily change of 0.69%.
- The Reserve Bank of India's spending on printing money dropped significantly. This happened even as the total value of currency in circulation grew. Higher denomination notes, especially the Rs 500 note, met this demand. Cash usage remains strong despite digital growth. The RBI plans to enhance banknote security and durability.
- The Reserve Bank of India is expected to hold its key interest rate steady in June. However, economists now foresee at

least one rate hike by the end of the year. This shift is driven by concerns over elevated oil prices and a weakening rupee. Inflation remains below the RBI's target, providing little immediate pressure for action.

- Fake currency detection in India increased in 2025-26. The Rs 500 note became the primary target for counterfeiters, showing a significant rise in fake detections. This trend contrasts with the decline in fake Rs 2,000 notes. Detection at commercial banks improved, indicating stronger frontline capabilities. The RBI is enhancing security features on banknotes.
- India and Oman's Comprehensive Economic Partnership Agreement begins June 1, 2026. This pact will significantly boost trade and energy security. Indian exporters will find new opportunities across various sectors. The agreement also supports India's energy diversification plans. Oman is becoming a key gateway for India's future energy and supply chains in the Gulf region.
- India's data centre capacity is set to surpass 3 gigawatts by 2028. This growth is driven by strong demand from hyperscalers and the increasing use of artificial intelligence. The country offers a development-friendly market. Major cities like Mumbai, Chennai, Hyderabad, and Delhi NCR are key hubs. This expansion will support India's digital economy and enterprise needs.

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

## Forthcoming Events

### Board Meetings as on 30/05/2026

Bharat Gears Limited	Financial Results/Dividend
La Opala RG Limited	Financial Results/Dividend
Apex Frozen Foods Limited	Financial Results/Dividend
Archies Limited	Financial Results
ARSS Infrastructure Projects Limited	Financial Results
Asian Granito India Limited	Financial Results
Asian Hotels (East) Limited	Financial Results/Dividend
Affordable Robotic & Automation Limited	Financial Results
Ahluwalia Contracts (India) Limited	Financial Results/Dividend
Alps Industries Limited	Financial Results
Bharat Road Network Limited	Financial Results
Deepak Builders & Engineers India Limited	Financial Results
Easy Trip Planners Limited	Financial Results
Essar Shipping Limited	Financial Results
Fiem Industries Limited	Financial Results/Dividend
Gammon India Limited	Financial Results
Gujarat Gas Limited	Financial Results/Dividend
IFGL Refractories Limited	Financial Results/Dividend
Jai Corp Limited	Financial Results/Dividend
Jindal Photo Limited	Financial Results

Jupiter Wagons Limited	Financial Results
K S Oils Limited	Financial Results
Linde India Limited	Financial Results/Dividend
Nectar Lifesciences Limited	Financial Results
Nitin Fire Protection Industries Limited	Financial Results
Patanjali Foods Limited	Financial Results
PTC Industries Limited	Financial Results
Rajesh Exports Limited	Financial Results
Sigachi Industries Limited	Financial Results/Dividend
Som Distilleries & Breweries Limited	Financial Results
Suraj Estate Developers Limited	Financial Results
Tenneco Clean Air India Limited	Financial Results
Thirumalai Chemicals Limited	Financial Results
TITAGARH RAIL SYSTEMS LIMITED	Financial Results/Dividend
TTK Healthcare Limited	Financial Results/Dividend
UFLEX Limited	Financial Results/Dividend

(Source: NSE)

### Corporate Actions as on 01/06/2026

Colgate Palmolive (India) Limited	Interim Dividend - Rs 24 Per Share
Epigral Limited	Dividend - Rs 5 Per Share

(Source: NSE)

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