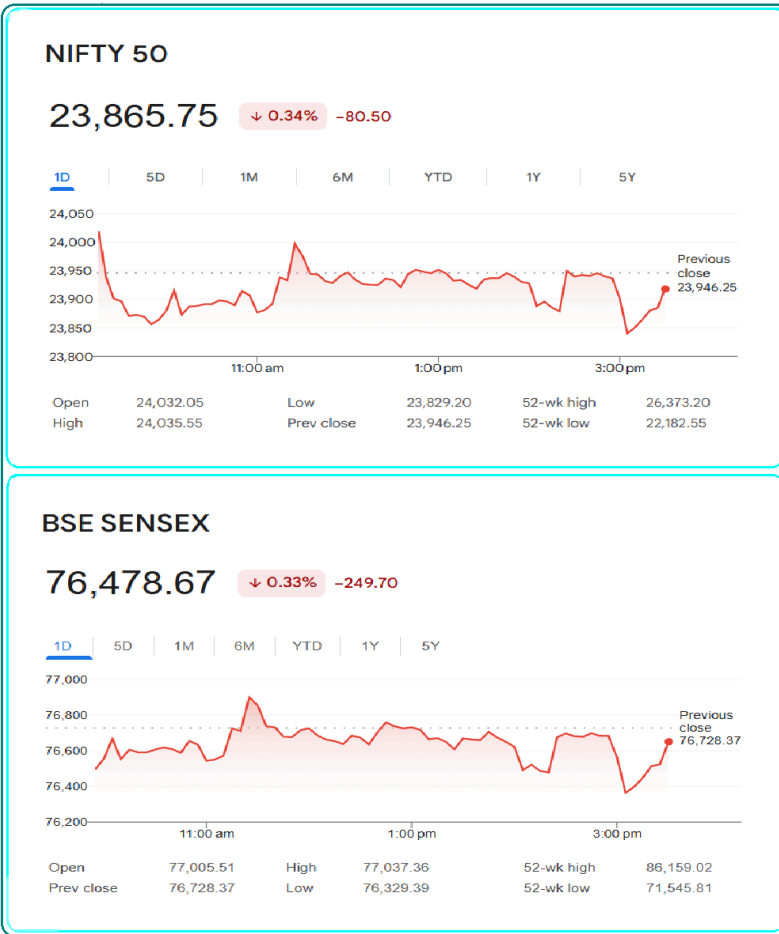


Index Chart



(Source: [Bloomberg](#))

Market Wrap Up

- The key equity barometers ended with modest cuts, extending their losing streak to a second consecutive session, as uncertainty surrounding the US-Iran negotiations in Doha, fresh foreign fund outflows and weakness in blue-chip IT stocks weighed on investor sentiment. Selling pressure in the IT sector further dampened market mood as investors shifted their focus to the upcoming June-quarter earnings season. Meanwhile, volatility remained elevated due to the NSE's monthly derivatives expiry. The Nifty settled below the 23,900 level. The S&P BSE Sensex declined 249.70 points or 0.33% to 76,478.67. The Nifty 50 index fell 80.50 points or 0.34% to 23,865.75. In two consecutive trading sessions, the Sensex dropped 0.80% while the Nifty fell 0.79%. The BSE 150 MidCap Index jumped 0.45% and the BSE 250 SmallCap Index rallied 0.51%.
- On the BSE, 2,349 shares rose and 1,884 shares fell. A total of 195 shares were unchanged.
- Among the sectoral indices, the Nifty Realty index (up 1.31%), the Nifty Consumer Durables index (up 1.16%) and the Nifty Pharma index (up 0.39%) outperformed the Nifty 50 index. Meanwhile, the Nifty IT index (down 2.73%), the Nifty Media index (down 0.77%) and the Nifty PSU Bank index (down 0.72%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

Indian Markets

Indices	Close	Previous	Change(%)
NIFTY 50	23865.75	23946.25	-0.34%
S&P BSE SENSEX	76478.67	76728.37	-0.33%
NIFTY MID100	61797.70	61567.30	0.37%
NIFTY SML100	18863.10	18673.10	1.02%

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

Derivative Watch

- Nifty **July** series futures witnessed a fresh **short** position build up. Open Interest has been increased by **80207** contracts at the end of the day.
- Long** position build up for the **July** series has been witnessed in **COFORGE, MARUTI, NBCC**.
- Short** position build up for the **July** series has been witnessed in **RELIANCE, SBIN, ICICIBANK, INFY**.

(Source: Capitaline F&O)

Sectoral Indices

Indices	Close	Previous	Change(%)
NIFTY BANK	57542.90	57727.35	-0.32%
NIFTY AUTO	26479.80	26417.60	0.24%
NIFTY FMCG	48794.20	49127.65	-0.68%
NIFTY IT	26299.05	27038.50	-2.73%
NIFTY METAL	12519.15	12545.00	-0.21%
NIFTY PHARMA	25326.40	25227.90	0.39%
NIFTY REALTY	829.55	818.85	1.31%
BSE CG	81413.36	80969.23	0.55%
BSE CD	59628.80	59052.79	0.98%
BSE Oil & GAS	26029.33	25940.30	0.34%
BSE POWER	8094.74	8089.85	0.06%

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

Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	70062.32	69468.11	0.86%
HANG SENG	22881.02	23026.68	-0.63%
STRAITS TIMES	5170.65	5208.75	-0.73%
SHANGHAI	4094.40	4073.90	0.50%
KOSPI	8476.48	8394.65	0.97%
JAKARTA	5643.19	5820.79	-3.05%
TAIWAN	46125.91	44999.90	2.50%
KLSE COMPOSITE	1664.06	1665.91	-0.11%
ALL ORDINARIES	8986.20	9026.90	-0.45%

(Source: [Yahoo Finance](#))

Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	140407.22	183491.87
NSE F&O	351389.33	476131.02

(Source: [NSE](#))

FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	1350.10

(Source: [NSE](#))

Corporate News

- Transformers and Rectifiers (India) Limited** has secured a significant order exceeding Rs 1,000 crore from Power Grid Corporation of India Ltd (PGCIL). This "ultra mega order" involves the manufacturing of various rated transformers and all associated work. The substantial deal highlights a major development for the company in the power infrastructure sector.
- Waaree Solar Americas** has landed a significant 236 MW module supply deal for a major solar project in Flemingsburg, Kentucky. These modules will be produced at their Texas facility, underscoring Waaree's commitment to bolstering America's clean energy infrastructure through domestic manufacturing. This contract further solidifies the US as a crucial market for the company's growth and clean energy initiatives.
- Oberoi Realty** is making a significant Rs 6,000 crore investment in its inaugural NCR project, a sprawling ultra-luxury residential development in Gurugram. The company sees the region as a key growth market, potentially rivaling Mumbai. This ambitious venture, featuring seven towers and retail space, aims for a substantial revenue of Rs 16,000 crore, signaling Oberoi Realty's pan-India expansion strategy.
- Coal India** is set to invest a substantial 19 billion rupees in research and development by 2030, focusing on clean coal, net-zero technologies, and mineral recovery. The state-run miner has already committed significant funds to Indian Institutes of Technology and is overseeing numerous R&D projects. This strategic investment marks a fourfold increase in R&D expenditure for fiscal year 2025, signaling a strong commitment to innovation.
- Hindustan Copper's** Jhagadia project in Gujarat, a 50,000-tonne secondary copper smelter, is poised to significantly boost the company's revenue and strategic performance.
- Tata Communications** is significantly boosting its subsea cable network between India and Singapore, investing in new fiber capacity to enhance connectivity for emerging AI hubs. These strategic moves, including integrating a new cable system and joining a consortium for another, aim to support India's booming data center market.

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
MARUTI	14115.00	13412.00	5.24%
TITAN	4404.00	4277.20	2.96%
ADANIENT	3036.00	2962.50	2.48%
BAJFINANCE	1004.75	982.05	2.31%
TMPV	352.20	345.05	2.07%

(Source: [Moneycontrol](#))

Top Losers

SCRIP NAME	Close	Previous	Change (%)
EICHERMOT	7073.50	7426.00	-4.75%
INFY	1000.40	1036.70	-3.50%
TATACONSUM	1075.60	1112.80	-3.34%
TCS	2031.50	2097.90	-3.17%
WIPRO	170.39	175.48	-2.90%

(Source: [Moneycontrol](#))

- **Suzlon** has landed a significant 105 MW wind energy order from Sunsure Energy, marking a major milestone with its new S175 turbines, India's tallest and most powerful. This deal, for 21 advanced turbines in Karnataka, underscores a growing partnership, now totaling over 400 MW. The S175's innovative design promises enhanced energy generation and opens up new wind energy possibilities.
- **Kalpataru Projects International** has secured new orders totaling Rs 2,957 crore across its Transmission & Distribution, buildings, and water segments.
- **Force Motors** has inked a deal with the Ministry of Road Transport & Highways to join the government's commercial vehicle replacement scheme in Delhi-NCR. This initiative, backed by a Rs 9,585-crore fund, encourages replacing older, polluting trucks and buses with BS-VI or electric models. Force Motors will leverage its dealerships to support this transition, aiming to modernize the region's fleet and cut emissions.
- **Tata Motors** is launching the highly anticipated Sierra EV today, June 30, in an all-new electric avatar. Teasers reveal a potential driving range exceeding 500 km, a modern cabin with a Boost Mode, and multiple terrain capabilities including Sand Mode. The SUV will offer all-wheel-drive options and is expected to be packed with premium features, rivaling upcoming electric SUVs in the Indian market.
- **Zee Entertainment** has secured a significant Rs 418 crore foreign investment from OFI Global China Fund LLC, marking the fund's return after a previous exit. This infusion of capital comes as Zee navigates a challenging broadcast environment and strengthens its digital operations.
- **Sterling & Wilson Renewable Energy** in a joint venture with Hassan Allam Construction has secured letter of award for the construction of solar power plant in Egypt.
- **KEC International** announced that it has secured new orders worth Rs 1,754 crore across its Transmission & Distribution (T&D) and Cables & Conductors businesses.
- **Reliance Power** announced its entry into the rapidly evolving field of Artificial Intelligence (AI) and allied new-age technologies through the incorporation of new subsidiaries.
- **RailTel Corporation of India** has received the Letter of Intent (LoI) from Thane Municipal Corporation. The estimated size of the contract is Rs 13.60 crore.
- **Ceigall India** has emerged as L1 bidder for tender floated by Public Works Department, Delhi Government related to strengthening and other works of various roads under South Maintenance Zone, PWD during 2026-27. The estimated tender cost was Rs. 256.46 crore, while the company's L1 bid was Rs. 330.84 crore (including GST), which is approx. 29% above the estimated tender cost.
- **Unimech Aerospace and Manufacturing** signed a long-term supply agreement with FACC Operations GmbH, Austria, strengthening its presence in the global aerospace supply chain.
- **Shilpa Medicare's** wholly owned subsidiary, Shilpa Biologicals, signed a co-development and supply agreement with Finland-based Orion Corporation.

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

Global News

- The People's Bank of China (PBoC) injected CNY 69.5 billion through seven-day reverse repos, while keeping the interest rate unchanged at 1.4%.
- China's NBS Composite PMI Output Index inched up to 50.6 in June 2026 from 50.5 in the previous month. The manufacturing PMI increased to 50.3 in June 2026 from 50.0 in the previous month while the non-Manufacturing PMI rose to 50.2 in June 2026 from 50.1 in May.
- U.K. economy expanded by 0.6% quarter-on-quarter in Q1 2026, accelerating from a revised 0.1% growth in Q4. On a yearly basis, the UK economy expanded 0.9% in Q1, matching the revised pace recorded in the previous period.
- U.K.'s current account deficit narrowed to GBP 22.1 billion (2.8% of GDP) in the first quarter of 2026 from an upwardly revised GBP 27.2 billion in the previous quarter.
- Germany's seasonally adjusted unemployment rate held at 6.3% in June 2026, with the number of unemployed unexpectedly falling by 1,000 to 2.984 million.
- Germany's retail sales rose 1.1% month-on-month in May 2026, rebounding from a revised 0.4% decline in the previous month. On an annual basis, retail sales advanced 1.8%, swinging from a revised 0.6% decline in April and marking the strongest annual growth in five months.
- Germany's import prices rose 6.8% year-on-year in May 2026, accelerating from a 5.3% increase in April. Monthly, import prices increased 0.7%, easing from a 1.2% rise in April.
- French annual inflation rate slowed to 1.8% in June 2026 from 2024-highs of 2.4% in May. Compared to the previous month, the CPI declined 0.2%.
- French domestic producer prices fell 0.3% month-on-month in May 2026, following a revised 2.0% decline in April. On a yearly basis, producer prices rose 3.0% in May, accelerating from a 2.3% increase in April.
- Japan's unemployment rate stood at 2.5% in May 2026, unchanged from the previous month.
- Japan's industrial production rose 0.5% month-over-month in May 2026, matching April's pace. On an annual basis, industrial output declined 1.7%, reversing a 2.0% rise in April and marking the first drop in six months.

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

Economic News

- Crude Oil traded at US\$ 70.97/bbl (IST 17:00).
- INR weakened to Rs. 94.67 from Rs. 94.55 against each US\$ resulting in daily change of 0.13%.
- India is significantly boosting its semiconductor ambitions with a Rs 1.25 lakh crore allocation for India Semiconductor Mission 2.0, a substantial increase from its predecessor. This move signals a deep commitment to establishing India as a global chip-making hub, focusing on equipment, materials, indigenous designs, and resilient supply chains.
- India experienced its driest June in over a decade, with monsoon rainfall falling nearly 40% below average. This deficit has delayed crucial crop sowing and prolonged heatwaves in northern regions. With a significant portion of farmland reliant on rain, the weak monsoon start raises concerns for agriculture and the economy, though improved rainfall is anticipated later in the season.
- Taxpayers now have until July 31, 2026, to file appeals with the Goods and Services Tax Appellate Tribunal (GSTAT). This extension, a month beyond the previous June 30 deadline, comes after a recent surge in filings caused technical issues on the GSTAT portal. The move provides crucial extra time for those needing to submit cases under Section 112 of the GST law.
- Indian exporters shipping to West Asia will benefit from extended enhanced insurance cover against payment defaults until September 30, 2026. This move, part of the RELIEF scheme, aims to bolster trade amidst the ongoing West Asia crisis and mitigate logistics challenges. The enhanced risk cover, initially set to expire sooner, now provides continued support for exporters facing credit risks.
- India's external debt reached \$762.8 billion by March 2026, a rise of \$26.3 billion year-on-year, pushing the debt-to-GDP ratio to 20.8%.
- India is bolstering its energy security by planning strategic reserves of crude oil, LPG, and LNG to cover up to a month's demand, aiming to prevent supply disruptions like those seen during the Persian Gulf crisis. This ambitious move follows a review of existing, limited stockpiles and includes expanding underground crude storage and addressing the challenges of storing gas.
- India's Russian oil imports hit an all-time high in June, reaching approximately 2.70 million barrels per day. This surge is attributed to refiners seeking Russian barrels to offset potential supply disruptions from the Strait of Hormuz. Russian oil now constitutes over half of India's total crude imports, significantly increasing its dominance as the primary supplier.
- Home sales experienced a notable dip in the June quarter, marking the slowest performance since early 2023. Persistent global uncertainties and supply chain issues have dampened buyer sentiment. Despite this, new project launches saw an annual increase, particularly in premium segments and infrastructure-driven areas. While most major cities saw sales decline, Kolkata, Hyderabad, and Bengaluru registered modest yearly growth.

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

Forthcoming Events

Board Meetings as on 01/07/2026

Adani Energy Solutions Limited	Fund Raising
Zee Entertainment Enterprises Limited	Fund Raising
Netweb Technologies India Limited	Fund Raising
Vikas EcoTech Limited	Financial Results

(Source: NSE)

Corporate Actions as on 01/07/2026

DCM Shriram Fine Chemicals Limited	Dividend - Re 0.40 Per Sh
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(Source: NSE)

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