



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
<b>Global</b>					
Nifty 50	24,718.60	-169.6	-0.68	0.01	4.11
BSE Sensex	81,118.60	-573.3	-0.70	-0.31	3.33
Bank Nifty	55,527.35	-555.2	-0.99	-0.67	8.75
Nifty Midcap 100	58,227.45	-213.40	-0.37	0.78	1.35
Nifty Smallcap 100	18,374.80	-90.25	-0.49	1.54	-3.09
S&P 500	5,976.97	-68.29	-1.13	0.69	1.85
DJIA	42,197.79	-769.83	-1.79	-0.25	-0.46
Nasdaq 100	21,631.04	-282.28	-1.29	0.65	3.12
Nikkei 225	37,834.25	-338.84	-0.89	1.93	-2.83
Hang Seng	23,892.56	-142.82	-0.59	3.05	21.61
Shanghai Com	3,377.00	-25.66	-0.75	0.49	3.55

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,718.60	81,118.60
Support	24,500 & 24,304	55,112 & 54,590
Resistance	24,890 & 25,080	56,152 & 56,508

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,162.89	15,426.41	-1,263.52
DII Cash Market	13,487.57	10,446.13	3,041.44

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
BHEL	394.20	1.76	35,564.55
ONGC	251.51	1.46	39,320.38
Tech Mahindra	1,659.00	0.89	2,511.08
TCS	3,445.70	0.33	2,178.49
Wipro	260.21	0.23	8,692.12
<b>Top Losers</b>			
Adani Ports	1405.00	-2.82	3,380.55
ITC	413.90	-1.69	17,873.93
SBI	792.35	-1.69	11,377.12
IndusInd Bank	816.85	-1.57	3,164.56
Hindalco	641.80	-1.42	4,543.93

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	75.61	1.88	-1.59
WTI (USD/bbl)	72.72	2.01	0.72
Gold Spot (USD/t oz.)	3,435.14	0.33	29.24
USD/INR	86.11	0.60	0.52
10 Year G-Sec India	6.29	0.16	-6.24
US 10 Year Bond	4.41	0.95	-3.16

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's market indexes fell on Friday as Israel's missile attacks against Iran heightened Middle Eastern tensions and lowered global risk sentiment. The Nifty 50 declined 0.68% to 24,718.6, while the BSE Sensex fell 0.70% to 81,118.60.

#### Global

US markets fell as Israel launched a round of airstrikes on Iran, raising oil costs and complicating matters at a time of high international tensions.

Japan's Nikkei share average fell as investors sold riskier assets after Israel launched wide scale strikes against Iran, stoking worries about geopolitical risks.

Mainland China and Hong Kong stocks slipped, mirroring losses across regional markets, as investors rushed toward safe-haven assets in response to Israeli strikes on Iran that escalated tensions in the Middle East.

### Commodities & Currency :

The Indian rupee plunged on Friday due to a jump in oil prices following Israel's strikes on Iran, prompting the central bank to intervene and curb additional losses.

Indian gold futures soared above the psychologically crucial 100,000 rupees (\$1,161.02) per 10 grams mark for the first time ever, driven by a weak rupee and matching gains in global markets.

### News:

Nearly all the iPhones exported by Foxconn from India went to the United States between March and May, customs data showed, far above the 2024 average of 50% and a clear sign of Apple's efforts to bypass high US tariffs imposed on China.

India's four publicly traded real estate investment trusts surpassed India's benchmark indices in fiscal 2025, with payouts per unit up 12% over the previous fiscal year.

ITC Ltd. acquired Rs 400 crore for Sresta Natural Bioproducts Ltd. up front. The company has bought the whole share capital, including 1.87 crore equity shares of Rs 10 each of Sresta Natural Bioproducts Private Ltd.

The shares of three state-run oil marketing businesses fell as Brent crude prices rose. BPCL (-1.90%), Indian Oil Corporation (-1.78%), and HPCL (-1.41%) all fell.

Kernex Microsystems (India) hit a 5% high after announcing that it has obtained two contracts from Southern Railways through a joint venture with VRRC known as the KERNEX-VRRC Consortium.

Hindustan Zinc Ltd. has declared an interim dividend of Rs 10 per share effective June 17. Investors must purchase shares by Monday, June 16, to be eligible.

Bajaj Finance Ltd. would divide its shares from face value of Rs 2 to Rs 1 apiece, with an ex-date of June 16.

Yes Bank dropped 1.27%. The bank announced that the Reserve Bank of India (RBI) has approved the extension of Prashant Kumar's tenure

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