

Market Snapshot (Updated at 8:35AM)

Indian Indices	Close	Net Chng.	Chng. (%)
Sensex	73524.26	719.08	0.97
Nifty	23123.00	243.70	1.04

Global Indices	Close	Net Chng.	Chng. (%)
DOW JONES	50786.01	80.77	0.16
NASDAQ COM.	25929.66	220.23	0.86
FTSE 100	10373.20	5.15	0.05
CAC 40	8199.29	18.95	0.23
DAX	24616.22	142.83	0.58
NIKKEI 225	64654.22	629.62	0.98
SHANGHAI	3975.04	14.36	0.36
HANG SENG	24659.81	9.22	0.04

Currency	Close	Net Chng.	Chng. (%)
USD / INR	95.71	0.77	0.80
USD / EUR	1.15	0.00	0.00
USD / GBP	1.34	0.00	0.05
USD / JPY	160.21	0.05	0.03

Precious Metals	Close	Net Chng.	Chng. (%)
Gold (USD)	4339.41	8.87	0.20
Silver	67.83	0.71	1.04

Energy	Close	Net Chng.	Chng. (%)
NYMEX Crude	90.75	0.50	0.55
Brent Crude	93.73	0.46	0.49
Natural Gas	3.15	0.00	0.13

Bond	Close	Net Chng.	Chng. (%)
10 Yrs G-Sec	6.95	0.02	0.33

Indian ADRs	Close	Net Chng.	Chng. (%)
Dr. Reddy's Lab	13.23	0.01	0.08
HDFC Bank	23.01	0.40	1.71
ICICI Bank	25.70	0.25	0.96
Infosys	12.28	0.12	0.97
Wipro	12.28	0.12	0.97

Institutional Flow (In Crore) 08-06-2026

Institution	Purchase	Sale	Net
FII	8162.88	13716.74	5553.86
DII	14636.70	9608.57	5028.13

Key Contents

- ⇒ [Market Outlook](#)
- ⇒ [Today's Highlights](#)
- ⇒ [Global News, Views and Updates](#)
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Bulk and Block Deals

- Motilal Oswal Financial Services: HDFC Life Insurance Company bought 18.2 lk shares, Motilal Oswal Healthcare Foundation (Promoter Group) sold 3.65 lk shares, and Motilal Oswal Foundation (Promoter Group) sold 14.55 lk shares at price Rs. 842.5 each
- TruAlt Bioenergy: Dhruv Khush Business Ventures sold 9.50 lk shares at price Rs. 516.42 each and Rajasthan Securities bought 7.60 lk shares at Rs. 516.83 each
- Cera Sanitaryware: Goldman Sachs Funds – Goldman Sachs India Equity Portfolio bought 1.18 lk shares and HDFC Standard Life Insurance Company sold 1.50 lk shares at price Rs. 5480 each
- NRB Bearings: Arohi Emerging Asia Master Fund bought 11.88 lk shares, Arohi Emerging India Master Fund bought 16.13 lk shares, Iroha Emerging India Fund-I bought 15.67 lk shares, and Trilochan Singh Sahney Trust 1 sold 43.70 lk shares at price Rs. 390 each

Bulk and Block Deals

- Info Edge (India): Sanjeev Bikhchandani, Promoter & Director disposed 1.5 lk shares
- Fusion Finance: Devesh Sachdev, Promoter, sold 1.5 lk shares
- Paisalo Digital: Equilibrated Venture Cflow, Promoter Group, released a pledge of 25.2 lk shares.

Corporate Events

- 9:15am: Mumbai. ICICI Securities hosts India Investor Conference Day 2, Speakers includes L&T President & CEO R. Shankar Raman; Kotak Mahindra AMC MS Nilesh Shah; HDFC MF MD & CEO Navneet Munot
- 4pm: Aegis Logistics conference call to discuss on 4Q FY26 earnings
- Stanley Lifestyles to consider scheme of amalgamation of units
- Annual General Meetings: Tata Consultancy Services (10:30 a.m.)
- Other Shareholder Events: EFFWA IN
- Earnings Calls: AEGISLOG IN, AEGISVOP IN, DEVIT IN, TECHLABS IN

Event of the Day

Event	Consensus	Previous
China Balance of Trade for May 2026.	\$91.5B	\$84.82B
The U.S. Existing Home Sales for May 2026.	4.05M	4.02M
The U.S. Balance of Trade for April 2026.	-\$55.5B	-\$60.3B

Corporate Action of the Day

Company Name	Announce Date	Action Type	Summary
NELCO Ltd	4/20/2026	Cash Dividend	1
INOX India Ltd	05-12-2026	Cash Dividend	2
Tata Consultancy Services Ltd	05-05-2026	Corporate Meeting	Annual Shareholder
ARSS Infrastructure Projects Ltd	05-12-2026	Corporate Meeting	Extraordinary Shareholder
Kalana Ispat Ltd	5/14/2026	Corporate Meeting	Annual Shareholder
Netlink Solutions India Ltd	5/18/2026	Corporate Meeting	Extraordinary Shareholder

Market in Detailed (Updated at 8:35AM)

Indian Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	73524.26	719.08	0.97	1.00	4.92	5.21	10.82
Nifty	23123.00	243.70	1.04	1.11	4.36	3.77	7.89
BSE M Cap	45526.59	797.76	1.72	1.85	4.19	5.40	2.24
BSE S Cap	52372.98	969.74	1.82	1.01	3.16	14.40	3.15
Nifty MC 100	59905.65	849.25	1.40	1.52	3.24	6.47	0.39
BSE Auto	56567.08	1065.77	1.85	0.86	5.66	1.63	6.03
BSE Capgoods	78425.05	1585.89	1.98	0.54	2.12	13.50	9.97
BSE FMCG	17850.88	75.94	0.42	0.26	6.04	0.87	13.17
BSE Metal	42164.29	1048.23	2.43	4.49	1.36	9.28	34.04
BSE Oil&Gas	26156.95	398.62	1.50	1.71	4.58	4.14	4.48
BSE Healthcare	46825.81	82.57	0.18	0.78	0.63	7.92	7.67
BSE Power	7998.12	137.15	1.69	1.74	3.46	18.03	15.60
BSE Realty	5841.46	154.38	2.57	2.50	8.88	2.53	27.53
BSE ConsDur	57831.18	823.27	1.40	1.66	4.50	3.56	1.03
BSE Bank	60938.74	539.88	0.88	0.85	2.27	3.18	4.78
BSE IT	27856.70	364.48	1.29	3.40	2.55	4.57	25.14

LME	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	4339.41	8.87	0.20	3.34	8.39	15.56	30.45
Silver(\$/Ounce)	67.87	0.34	0.49	9.65	21.15	21.97	84.60
Aluminium	3651.85	4.96	0.14	4.42	2.50	4.54	49.32
Copper	13592.08	101.76	0.75	1.56	0.57	6.05	39.22
Zinc	3517.94	7.69	0.22	1.08	2.95	7.51	33.74
Lead	1982.11	11.80	0.59	0.58	0.80	3.77	1.57

Currency	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	95.71	0.77	0.80	0.74	1.28	3.53	10.53
USD Index	99.97	0.08	0.08	0.75	2.11	0.80	1.04
YUAN	6.78	0.00	0.04	0.24	0.22	1.87	5.89
GBP	1.34	0.00	0.08	0.86	1.91	0.65	1.48
EUR	1.15	0.00	0.04	0.79	2.07	0.83	1.02
YEN	160.21	0.05	0.03	0.19	1.89	1.59	9.76

Agro Commodities	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	241.65	0.45	0.19	4.94	9.55	14.60	24.00
Cotton	76.94	0.67	0.86	4.47	9.97	10.98	11.38
Sugar	14.12	0.02	0.14	2.28	3.88	0.49	16.05
Wheat	583.50	0.00	0.00	3.28	5.78	4.85	5.28
Soybean	1112.75	3.00	0.27	4.51	7.88	7.96	3.56

Global Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	50786.01	80.77	0.16	0.57	2.37	6.38	18.77
Nasdaq	25929.66	220.23	0.86	4.27	1.21	14.25	32.35
S&P 500	7405.73	21.99	0.30	2.56	0.09	8.97	23.31
FTSE100	10373.20	5.15	0.05	0.33	1.37	1.21	17.45
CAC40	8199.29	18.95	0.23	0.65	1.07	3.59	5.23
DAX	24616.22	142.83	0.58	1.55	1.14	5.16	1.83
Mexico IPC	65650.25	491.15	0.74	3.65	6.02	1.85	13.56
Brazil Bovespa	168668.7	350.40	0.21	2.95	8.39	6.77	24.30
Japan Nikkei	64654.22	629.62	0.98	3.12	3.09	22.62	69.75
Hang Seng	24659.81	9.22	0.04	5.34	6.61	2.99	1.93
Taiwan Index	44421.37	911.66	2.10	2.51	6.76	38.32	103.83
Shanghai Comp	3975.04	14.36	0.36	2.49	4.93	3.00	16.88
KOSPI	7755.89	268.60	3.59	11.78	3.40	47.62	171.49
Malaysia KLCI	1676.32	3.53	0.21	0.42	4.12	0.11	10.31
Jakarta Comp	5444.61	104.02	1.95	12.09	21.86	25.78	23.44
Philippine SE	5945.71	70.28	1.20	0.63	0.19	0.94	7.13
Thai Exch	1561.68	20.92	1.32	0.46	4.09	12.92	37.56

Freight	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	2916.00	65.00	2.18	9.50	2.08	41.14	72.44
Baltic Dirty	2099.00	11.00	0.52	2.24	18.45	30.95	123.06

Energy Markets	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	90.75	0.50	0.55	3.16	4.84	4.19	39.07
BRENT Crude	93.73	0.46	0.49	2.30	3.87	10.04	43.94
Natural Gas	3.15	0.00	0.13	0.51	4.79	11.04	26.92

Bond Markets	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	4.56	0.00	0.04	2.72	4.83	11.44	2.02
UK	4.94	0.04	0.82	0.92	0.63	6.83	6.44
Brazil	6.13	0.05	0.84	1.53	4.81	0.97	9.47
Japan	2.74	0.01	0.44	6.20	10.31	24.95	86.58
Australia	4.94	0.03	0.62	1.18	0.99	0.04	15.72
India	6.95	0.02	0.33	1.00	0.39	3.95	10.59
Switzerland	0.45	0.01	2.28	4.42	16.32	15.42	22.68
Germany	3.06	0.02	0.72	1.90	1.83	6.99	18.79

Indian equity markets are expected to open marginally lower on Tuesday, June 9, 2026, tracking GIFT Nifty at 23,140 — down approximately 36 points (−0.16%) from Monday's Nifty futures close — signalling a flat to cautiously negative start as the market attempts to stabilise at the 23,100–23,150 zone after Monday's 243-point crash. The MoU text had not yet been finalised as of Monday night — the 60-day ceasefire extension framework remains alive in principle but unsigned, with ongoing back-and-forth over enrichment limits, uranium stockpile disposal and verification mechanisms keeping the Polymarket odds of a deal by June 15 declining steadily throughout May. Trump's "over the next week" signal from Monday morning remains the sole positive diplomatic anchor — but the structural backdrop has materially deteriorated: Amos Hochstein, who served as senior energy advisor to President Biden, delivered the most sobering assessment of the conflict: "No matter what happens, the Iranians will control the Strait of Hormuz for the foreseeable future — it doesn't even matter what the deal says." Even as the MoU negotiations were being discussed, the US and Iran exchanged military strikes — confirming the now-established pattern of simultaneous diplomacy and combat that has defined the past three weeks of the conflict. The 23,000 psychological floor — the last structural defence before the April 2 bear phase territory of 22,182 — is the defining technical reference for today's session. A GIFT Nifty of 23,140 opening below Monday's future close of 23,174.6 makes the 23,000 zone the immediate intraday battleground. "Zero new positions, maximum caution" remains the only operative stance until the MoU is formally signed.

Nifty 50 Performance

Monday's Nifty 50 opened at 23,080.70 — also effectively the day's low — touched a high of 23,267.30, a low of 23,070.15, and closed at 23,123 — down 243.70 points (−1.05%) — the lowest daily close of the entire war cycle. GIFT Nifty at 23,140 signals an open approximately flat to Monday's close — the index opens near 23,100–23,140, immediately placing the 23,000 psychological floor under scrutiny. RSI at 35–36 zone — the deepest extreme oversold reading since the March 30 bear phase trough of 22,331. MACD bearish crossover active — histogram at its most negative expansion of the entire war cycle. Every prior sub-36 RSI reading in this war cycle has preceded a 5–10% recovery rally within 5 sessions. A close above 23,200 today is the structural minimum stabilisation signal. A close below 23,000 is the single most alarming possible outcome — opening 22,800 and 22,500 rapidly.

Nifty Technical Levels

Support: 23,000, 22,800, 22,500

Resistance: 23,300, 23,500, 23,700

Bank Nifty Performance

Monday's Bank Nifty opened at 53,853.45 — also the day's low — hit a high of 54,455.20, and closed at 54,063.75 — down 432.50 points (−0.81%) — the open equalling the day's low confirming institutional demand from the first tick. Bank Nifty has now closed above 54,000 for five consecutive sessions — the most structurally constructive streak since the corrective phase deepened. GIFT Nifty's flat indication keeps Bank Nifty opening near 54,063 today. Hochstein's assessment that Iran "will control the Strait of Hormuz for the foreseeable future" regardless of the deal's language is a structural crude normalisation delay signal — directly negative for banking through sustained inflation and FII return deferral. RSI at 45–47 zone — holding in the neutral boundary. MACD bearish crossover intact. A close above 54,500 today signals the banking floor is firmly established.

Bank Nifty Technical Levels

Support: 53,500, 53,000, 52,500

Resistance: 54,500, 55,000, 55,500

Global Market Performance

- Dow Jones 50,792 (0.01%)
- S&P500 7433 (0.07%)
- Nasdaq 29,466 (0.29%)
- NIKKEI 64,634 (0.98%)
- HANG SENG 24,524 (-0.54%)
- DAX 24,552 (-0.12%)
- CAC 40 8199 (-0.23%)
- KOSPI 7755 (3.62%)
- FTSE 100 10,373 (0.05%)

- **JSW Energy:** The company successfully commissioned its Halol Wind Blade Manufacturing Plant in Gujarat.
- **Titan Company:** The jewelry and watchmaker redeemed Commercial Papers worth Rs 1,000 crore.
- **Aye Finance:** The board approved the issuance of Non-Convertible Debentures (NCDs) worth \$15 million on a private placement basis.
- **Goldiam International:** Announced the opening of its 25th retail store for lab-grown diamond jewellery under its brand name "ORIGEM".
- **JNK India:** Secured a "large" order (which the company classifies as Rs 100-300 crore) from CC7 Emirates Engineering Solutions. It also secured another large export order for an Incinerator Package and Waste Gas Handling Systems.
- **Shanti Gold International:** Commenced commercial production at its new manufacturing facility in Mumbai.
- **HDB Financial:** The board is scheduled to meet on June 11 to consider various fundraising options.
- **Hindustan Copper:** The government has appointed Anupam Misra as the new Chairman and Managing Director.
- **HCLTech:** The IT services giant launched a dedicated AI Innovation Zone in collaboration with Google Cloud in the United States.
- **RVNL:** Secured an Rs 221 crore Letter of Acceptance (LoA) from the South East Central Railway for the replacement of panel interlocking with electronic interlocking systems.
- **Nibe:** Allotted 3.2 lakh shares upon the conversion of warrants at an issue price of Rs 1,258 per share to the Eminence Global Fund.
- **Kirloskar Ferrous:** The board will meet on June 12 to consider a final dividend payout.
- **Brigade Enterprises:** Set June 17 as the record date to determine shareholder eligibility for a 1:3 bonus issue of equity shares.
- **Grasim Industries:** The company plans to invest a massive Rs 3,094 crore to expand its Lyocell capacity at its facility in Karnataka.
- **Panacea Biotech:** Launched the "DENSTAR" project aimed at developing a dengue vaccine specifically for Africa.
- **Aditya Birla Fashion and Retail:** Its digital arm, TMRW, acquired an additional 10% stake in its subsidiary, Bewakoof.
- **Lemon Tree Hotels:** Signed a new franchise agreement for a Key Prima hotel in Rajasthan, which will feature 88 rooms alongside restaurants and other amenities.
- **Adani Enterprises:** A step-down subsidiary acquired a 100% stake in Portus Ventures to undertake new real estate activities.
- **Electronics Mart:** Commenced operations at a newly opened store in Telangana.
- **Ratnaveer Precision:** The board will meet on June 11 to consider a potential fundraise.
- **TCS:** The IT major launched a specialized business unit to help global enterprises build and scale Global Capability Centres (GCCs).
- **Avenue Supermarts:** The operator of D-Mart invested Rs 150 crore into its subsidiary, Avenue E-Commerce.
- **Motilal Oswal Financial Services:** Successfully incorporated a new subsidiary, Motilal Oswal Pension Fund Management.
- **Amber Enterprises:** Received final approval from the NCLT Chandigarh Bench for the merger of its subsidiary, AmberPR Tech, into the parent company.
- **Persistent Systems:** Approved the transfer of a 100% stake in Persistent Systems UK to the Aepona Group. The board also approved the merger of its subsidiary, MediaAgility India, into the parent company.
- **Ather Energy:** The board will meet on June 12 to consider a potential fundraise via the issuance of bonds.

Asian Stocks Recover After AI Selloff, Oil Slips

Asian stocks rebounded after their biggest drop since March as tensions in the Middle East eased and a selloff in artificial intelligence shares abated. The MSCI Asia Pacific Index climbed 1.3%, its first advance following three days of losses spurred by factors including bets for an interest-rate hike by the Federal Reserve. The Kospi Index in South Korea, the world's best-performing gauge this year on the back of AI-related gains, advanced as dip buyers returned, led by a 8.1% jump in SK Hynix Inc. and a 3.9% rise in Samsung Electronics Co. Ltd. Futures contracts for the Nasdaq 100 Index erased earlier losses to advance 0.3%. Optimism toward technology stocks remained firm as investors found fresh reasons to back the AI trade. SpaceX's initial public offering was well oversubscribed, Nvidia Corp. and SK Hynix sealed a pact to develop chips and Apple Inc.'s AI-led reboot set the stage for new devices. Adding to the sentiment, Brent crude fell 0.5% to trade below \$94 a barrel after Iran and Israel pledged to ease strikes that threatened the peace talks in the Middle East.

China Exports Surge Tops Forecasts as AI Propels Trade

- China's exports and imports expanded at a faster pace in May, topping forecasts as booming demand for artificial intelligence hardware offsets disruptions from the war in Iran.
- Exports jumped more than 19% from a year earlier, and imports soared over 27% in May, leaving a trade surplus of \$105.4 billion, the biggest since January.
- The AI boom is driving K-shaped expansion across China's trade, factory production and industrial profits, with semi-conductors and computers accounting for half of China's export growth in April.

Oil Steady as Israel and Iran Halt Hostilities That Risked Talks

Oil steadied after Israel and Iran agreed to end attacks against each other following an escalation of violence that threatened to derail efforts to end the war in the Middle East. Brent held near \$94 a barrel after closing slightly higher on Monday, while West Texas Intermediate was around \$91. Israeli Prime Minister Benjamin Netanyahu said the country is holding fire against Iran for now, but will respond should Tehran attack again. Iranian media conveyed similar sentiment. The flare-up in hostilities put wider negotiations to end the war in the Middle East at risk, prompting President Donald Trump to appeal for de-escalation. A fragile ceasefire remains in place, but the Strait of Hormuz is still effectively closed by a double blockade maintained by Tehran and Washington, choking off supplies of crude, fuels and natural gas to global customers.

UN Says Children Are Dying in Cuba Due to Harsh US Sanctions

- The United Nations warned that tighter US sanctions on Cuba have led to a spike in infant mortality and plummeting survival rates for child cancer patients.
- US sanctions are depriving Cuba of access to water, food and healthcare, with children dying due to a lack of essential medical supplies and medicines, according to UN High Commissioner for Human Rights Volker Türk.
- The UN reported alarming trends, including a doubling of infant mortality and a decline in childhood cancer survival rates, as well as essential medicines being in critical short supply, since the fuel restrictions were imposed.

Iran, Israel Pledge to End Attacks That Threatened Talks

Iran and Israel agreed to ease strikes against each other after a flare-up in violence threatened to derail peace negotiations and led President Donald Trump to appeal for de-escalation. Israeli Prime Minister Benjamin Netanyahu said in a televised statement Monday that Israel would hold its fire in Iran for now but would respond should Tehran attack again. Earlier, local TV station N12 reported that strikes in south Lebanon, where Israel is fighting Iran-backed Hezbollah militants, would continue at full force. Iran had earlier announced an end to its military operations against Israel. But its central military command warned that if Israel continued to attack, including in southern Lebanon, "much harsher and more crushing actions than before will be on the way," the semi-official Fars news agency reported. The pledges from the two sides came after Trump spoke with Netanyahu by phone on Monday. A White House official confirmed the call without providing details of the conversation. Netanyahu said he told Trump that Israel has the right to self-defense. The prime minister also rejected Tehran's warning that any further Israeli hostilities against Hezbollah in Lebanon would draw a fresh Iranian attack. "This equation is intolerable," he said.

Auto / Auto Ancillaries

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Banking / Finance

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Oil & Gas

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