

### Market Snapshot (Updated at 8:35AM)

Indian Indices	Close	Net Chng.	Chng. (%)
Sensex	77155.62	347.14	0.45
Nifty	24085.70	96.55	0.40

Global Indices	Close	Net Chng.	Chng. (%)
DOW JONES	51492.55	507.12	0.98
NASDAQ COM.	26021.66	354.68	1.34
FTSE 100	10508.61	14.40	0.14
CAC 40	8430.79	16.48	0.20
DAX	24934.67	24.26	0.10
NIKKEI 225	71082.94	1269.32	1.82
SHANGHAI	4110.18	0.63	0.02
HANG SENG	23921.04	400.98	1.65

Currency	Close	Net Chng.	Chng. (%)
USD / INR	94.53	0.03	0.03
USD / EUR	1.15	0.01	0.65
USD / GBP	1.33	0.01	0.63
USD / JPY	160.61	0.43	0.27

Precious Metals	Close	Net Chng.	Chng. (%)
Gold (USD)	4322.14	63.78	1.50
Silver	70.25	1.06	1.49

Energy	Close	Net Chng.	Chng. (%)
NYMEX Crude	75.46	1.31	1.71
Brent Crude	78.30	1.20	1.51
Natural Gas	3.17	0.03	0.92

Bond	Close	Net Chng.	Chng. (%)
10 Yrs G-Sec	6.88	0.01	0.07

Indian ADRs	Close	Net Chng.	Chng. (%)
Dr. Reddy's Lab	13.15	0.15	1.13
HDFC Bank	24.76	0.51	2.02
ICICI Bank	27.89	0.23	0.82
Infosys	11.70	0.27	2.26
Wipro	11.70	0.27	2.26

### Institutional Flow (In Crore) 17-06-2026

Institution	Purchase	Sale	Net
FII	14360.36	14181.61	178.75
DII	15164.77	13462.13	1702.64

### Key Contents

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

- **Corona Remedies:** Sepia Investments Limited sold 43.28 lk shares at price Rs. 1730 per share., HDFC Mutual Fund bought 24.50 lk shares at price Rs. 1730 per share., Aditya Birla Sun Life Mutual Fund bought 4.90 lk shares at price Rs. 1730 per share., Aberdeen Asian Smaller Companies Investment Trust Plc bought 4.50 lk shares at price Rs. 1730 per share., Invesco Mutual Fund bought 2.89 lk shares at price Rs. 1730 per share., Aberdeen Standard Sicav I - Asian Smaller Companies Fund bought 2.74 lk shares at price Rs. 1730 per share., Kotak Mahindra Mutual Fund bought 1.61 lk shares at price Rs. 1730 per share., Whiteoak Capital Mutual Fund bought 1.45 lk shares at price Rs. 1730 per share., Abu Dhabi Investment Authority - Way bought 39130 shares at price Rs. 1730 per share., HDFC Mutual Fund bought 23.33 lk shares at price Rs.1730 per share
- **Bazaar Style Retail:** GARG BROTHERS sold 8.75 lk shares at price Rs. 328.72 per share
- **DOMS Industries:** Fila - Fabbrica Italiana Lapis Ed Affini Spa sold 23.40 lk shares at price Rs. 2200.55 per share., Fila - Fabbrica Italiana Lapis Ed Affini Spa sold 19.08 lk shares at price Rs. 2200.07 per share., SBI Mutual Fund bought 9.32 lk shares at price Rs. 2200 per share., Axis Mutual Fund bought 3.61lk shares at price Rs. 2200 per share.
- **Finolex Ind:** HDFC Life Insurance sold 42.70 lk shares at price Rs.169.71 per share
- **Kitex Garments:** C K G Super Market sold 13.93 lk shares at price Rs. 155.2 per share
- **Motisons Jewellers:** L7 Hitech brought 58 lk shares at price Rs. 14.15 per share, Mint Focused Growth Fund Pcc- Cell 1 sold 90 lk shares at price Rs. 14.1 per share,
- **SBC Exports:** Deepika Gupta bought 29.50 lk shares at price Rs. 37.58 per share.. Nitn Kapoor bought 24 lk shares at price Rs. 37.5 per share.
- **Finolex Industries:** HDFC Life Insurance sold 37.77 lk shares at price Rs. 169.62

### Insider Trade

- **Eveready Industries India:** Gyan Enterprises Private Limited, Promoter, bought 8,312 shares.
- **NGL Fine Chem:** Sunita Potdar, Promoter Group, sold 368 shares.
- **GHCL :** Neelabh Dalmia, Promoter, bought 1,400 shares.
- **NCC:** Sirisha Projects Private Limited, Promoter, bought 3,27,485 shares.
- **Zyduz Wellness:** Samar Babubhai Patel, Promoter Group, bought 500 shares.
- **JJ Finance Corporation:** Anil Jhunjhunwala, Promoter & Director, bought 22,366 shares.
- **Visaka Industries:** Security Services Private Limited, Promoter, bought 450 shares.
- **Shakti Pumps India:** Shakti Sons Trust, Promoter, bought 9,000 shares., Shakti Sons Trust, Promoter, bought 9,000 shares.
- **INOX India:** Manju Jain, Promoter Group, sold 2,840 shares., Lata Madhusudan Rungta, Promoter Group, sold 30,500 shares.
- **KCP:** VRK Grandsons Investment Ltd, Promoter Group, bought 15,807 shares.
- **M & B Engineering Ltd:** Birva Chirag Patel, Promoter Director, bought 10,000 shares., Umaben Girishbhai Patel, Promoter Group, bought 10,000 shares., Umaben Girishbhai Patel, Promoter & Director, bought 10,000 shares., Birva Chirag Patel, Promoter & Director, bought 10,000 shares.

### Event of the Day

Event	Consensus	Previous
The U.S. Initial Jobless Claims for June 13, 2026.	232K	229K

### Corporate Action of the Day

Company Name	Announce Date	Action Type	Summary
HDB Financial Services Ltd	4/15/2026	Cash Dividend	2
Capital Small Finance Bank Ltd	4/29/2026	Cash Dividend	5
Swastika Investmart Ltd	05-02-2026	Cash Dividend	0.6
Tata Technologies Ltd	05-04-2026	Cash Dividend	8.35
GHCL Ltd	05-05-2026	Cash Dividend	12
Vimta Labs Ltd	05-06-2026	Cash Dividend	2
eMudhra Ltd	05-06-2026	Cash Dividend	1.25
Monika Alcobev Ltd	05-08-2026	Cash Dividend	1
Shankara Building Products Ltd	05-05-2026	Corporate Meeting	Annual Shareholder
State Bank of India	5/14/2026	Corporate Meeting	Annual Shareholder
Sejal Glass Ltd	5/16/2026	Corporate Meeting	Annual Shareholder
Raymond Ltd	5/26/2026	Corporate Meeting	Extraordinary Shareholder

## Market in Detailed (Updated at 8:35AM)

Indian Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	77155.62	347.14	0.45	4.29	2.44	0.59	5.27
Nifty	24085.70	96.55	0.40	3.75	1.84	1.29	2.93
BSE M Cap	47415.37	366.22	0.78	5.23	3.31	9.92	3.78
BSE S Cap	55006.80	383.01	0.70	5.61	7.07	18.96	3.72
Nifty MC 100	62123.35	321.30	0.52	3.87	2.73	10.36	6.91
BSE Auto	58970.28	295.85	0.50	3.72	4.51	4.12	12.81
BSE Capgoods	82328.59	2207.38	2.76	5.43	8.02	18.95	17.87
BSE FMCG	18384.53	36.18	0.20	1.37	1.93	4.07	8.10
BSE Metal	41908.38	476.95	1.15	0.83	2.30	9.09	37.72
BSE Oil&Gas	26787.58	12.27	0.05	4.00	0.85	1.15	1.20
BSE Healthcare	47053.33	9.45	0.02	0.15	0.52	10.19	9.06
BSE Power	8098.85	95.07	1.19	2.94	2.65	16.15	20.86
BSE Realty	6359.79	28.86	0.45	8.91	8.20	11.90	18.76
BSE ConsDur	60988.42	834.61	1.39	6.06	5.97	8.41	5.56
BSE Bank	64905.60	360.52	0.56	4.59	7.64	4.35	3.21
BSE IT	28137.03	224.59	0.80	2.12	2.35	1.71	26.65

LME	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	4322.14	63.78	1.50	2.57	5.39	10.33	28.23
Silver(\$/Ounce)	69.47	1.49	2.20	3.15	10.67	7.89	88.98
Aluminium	3408.98	37.04	1.10	1.65	6.05	0.12	33.50
Copper	13763.45	63.55	0.46	2.21	1.93	8.70	40.56
Zinc	3576.38	28.35	0.80	2.94	1.62	12.49	37.00
Lead	1950.60	8.73	0.45	0.89	1.67	3.52	0.40

Currency	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	94.53	0.03	0.03	0.78	1.93	2.28	8.77
USD Index	100.29	0.20	0.20	0.43	1.10	0.20	1.40
YUAN	6.76	0.00	0.03	0.18	0.56	1.85	6.32
GBP	1.33	0.00	0.14	0.78	0.91	0.41	0.82
EUR	1.15	0.00	0.14	0.53	1.19	0.57	0.32
YEN	160.61	0.02	0.01	0.44	1.13	0.48	9.65

Agro Commodities	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	271.90	0.90	0.33	11.16	4.54	2.61	9.12
Cotton	79.54	0.23	0.29	4.19	5.26	9.53	16.78
Sugar	14.37	0.06	0.42	0.14	6.02	4.26	14.26
Wheat	621.00	0.25	0.04	3.80	8.37	1.08	5.48
Soybean	1148.50	0.75	0.07	1.28	4.37	0.61	6.00

Global Indices	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	51492.55	507.12	0.98	3.15	3.64	11.40	22.10
Nasdaq	26021.66	354.68	1.34	3.39	0.26	17.47	33.13
S&P 500	7420.10	91.25	1.21	2.11	0.23	12.01	24.06
FTSE100	10508.61	14.40	0.14	2.47	1.79	1.97	18.83
CAC40	8430.79	16.48	0.20	3.30	5.55	5.78	10.12
DAX	24934.67	24.26	0.10	3.06	2.58	6.09	6.93
Mexico IPC	68304.73	178.21	0.26	5.37	0.15	3.84	20.40
Brazil Bovespa	168453.9	1194.54	0.70	0.10	4.82	6.23	21.44
Japan Nikkei	71082.94	1269.32	1.82	10.83	17.03	28.84	83.03
Hang Seng	23921.04	400.98	1.65	1.39	6.87	8.12	0.85
Taiwan Index	46546.97	626.05	1.36	7.77	13.72	35.39	108.01
Shanghai Comp	4110.18	0.63	0.02	3.02	0.58	1.09	21.21
KOSPI	8925.27	61.80	0.70	14.97	18.76	50.65	200.32
Malaysia KLCI	1714.39	3.69	0.22	2.07	0.81	0.93	13.34
Jakarta Comp	6101.23	121.68	1.96	3.33	7.58	14.18	14.19
Philippine SE	6152.45	37.39	0.61	3.55	3.55	1.60	2.92
Thai Exch	1587.07	0.98	0.06	1.50	4.57	10.15	44.99

Freight	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	2653.00	17.00	0.64	4.26	14.20	28.54	41.57
Baltic Dirty	1953.00	26.00	1.35	4.31	16.93	28.80	88.88

Energy Markets	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	75.46	1.31	1.71	13.94	30.54	21.64	0.45
BRENT Crude	78.30	1.20	1.51	13.31	27.10	16.66	12.02
Natural Gas	3.17	0.03	0.92	2.82	0.44	7.41	26.87

Bond Markets	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	4.46	0.03	0.62	0.04	2.79	4.55	1.56
UK	4.75	0.04	0.77	3.65	8.14	1.21	4.42
Brazil	6.08	0.04	0.68	2.46	1.14	1.84	9.10
Japan	2.63	0.03	1.15	2.12	3.77	18.66	80.96
Australia	4.78	0.02	0.31	2.31	6.48	2.35	12.49
India	6.88	0.01	0.07	0.13	2.58	2.50	9.85
Switzerland	0.34	0.03	7.18	27.90	37.20	0.89	3.39
Germany	2.93	0.00	0.10	4.84	7.58	0.72	15.46

Indian equity markets are expected to open flat on Thursday, June 18, 2026, tracking GIFT Nifty at 24,096, up approximately 2 points from Wednesday's Nifty futures close, signalling a neutral consolidation session as markets hold the 24,000 breakthrough ahead of the single most anticipated event of the entire 110-day war cycle: the formal signing of the US-Iran MoU in Geneva tomorrow. According to the Swiss Federal Department of Foreign Affairs, the signing of the MoU between the United States and Iran is scheduled for Friday, June 19, 2026, at the Bürgenstock resort in Switzerland, the same venue that hosted the Ukraine peace summit, with VP Vance, Steve Witkoff and Jared Kushner attending for the US side and Iran's Deputy FM Kazem Gharibabadi leading the Iranian delegation. The MoU text released on June 17 confirms that the US Treasury will issue immediate waivers for exporting Iranian crude oil, petroleum products, and banking, transportation and insurance services. Iran can begin selling crude under the agreement's terms immediately upon signing. Polymarket has locked in 99% odds of a permanent peace deal by October-November 2026, reflecting the market's near-certain assessment that Friday's signing is the point of no return toward full conflict resolution. Analysts at ING cautioned that whether this delivers much lower energy prices is highly questionable and noted the inflation genie is out of the bottle, with ECB president Lagarde flagging higher energy prices spilling over to other sectors, structural caution that explains why GIFT Nifty is consolidating rather than surging further. Today is the final pre-signing session. A second consecutive close above 24,000 today formally triggers the 50-day EMA reclaim and the bull trend reversal confirmation for the entire war cycle.

### Nifty 50 Performance

Wednesday's Nifty 50 opened at 24,044.50, touched a high of 24,108.20, a low of 23,969.70, and closed at 24,085.70, up 96.55 points (+0.40%), the first sustained daily close above 24,000 since May 26 and the formal reclaim of the most important psychological resistance of the war cycle. GIFT Nifty at 24,096 signals an open near Wednesday's close, a second consecutive session opening and consolidating above 24,000. RSI at 62 to 64 zone is the highest sustained reading of the war cycle, with room to 70 before overbought territory. MACD bullish crossover is confirmed and histogram is expanding positively. A second consecutive close above 24,000 today confirms the 50-day EMA reclaim and formally signals the bull trend reversal. Friday's Geneva signing gap-up targets 24,500 and beyond.

### Nifty Technical Levels

**Support: 24,000, 23,800, 23,500**

**Resistance: 24,200, 24,500, 25,000**

### Bank Nifty Performance

Wednesday's Bank Nifty opened at 57,434.05, hit a high of 57,646.15, a low of 57,222.40, and closed at 57,585.05, up 287.90 points (+0.50%), the highest close since early May. US Treasury sanctions waivers for Iranian crude oil transportation and insurance services upon signing will trigger immediate commercial shipping confidence restoration, the most direct banking macro positive of the entire conflict. GIFT Nifty's flat indication keeps Bank Nifty opening near 57,585 today, a six-consecutive day hold above 57,000. RSI at 67 to 69 zone is overbought-adjacent but structurally anchored by the macro regime shift. MACD bullish crossover is powerfully intact. A close above 58,000 today ahead of Friday's signing extends the banking recovery toward 58,500.

### Bank Nifty Technical Levels

**Support: 57,000, 56,500, 56,000**

**Resistance: 58,000, 58,500, 59,000**

### Global Market Performance

- Dow Jones 51,811 (0.62%)
- S&P500 7568 (0.84%)
- Nasdaq 30,098 (0.30%)
- NIKKEI 71,052 (0.55%)
- HANG SENG 23,886 (-1.75%)
- DAX 24,875 (0.27%)
- CAC 40 8430 (-0.20%)
- KOSPI 8937 (0.83%)
- FTSE 100 10,508 (0.14%)

- **Black Box:** CRISIL reaffirmed ratings and upgraded the long-term outlook to Positive, while total bank facilities were enhanced to Rs. 70 crore.
- **Capacite Infracore:** Approval for issuance of 350 Non-Convertible Debentures having a face value of Rs. 10 lakh, aggregating up to Rs. 35 crore, with a green shoe option of up to 200 Non-Convertible Debentures, aggregating up to Rs. 20 crore on a private placement basis.
- **KNR Constructions:** Company has transferred the balance 0.10%, comprising 488 equity shares of KNR Ramagiri Infra, an arm of the company, to Indus Infra Trust and consequently, the arm has ceased to be a subsidiary company.
- **RailTel Corporation of India:** Company has received the Letter of Intent from Director IT; the estimated size of the order as per the Lol is Rs. 52.56 crore.
- **Lupin:** Announced the launch of Azilsartan Medoxomil Tablets, 40 mg and 80 mg, in the United States following approval from the U.S. FDA for its Abbreviated New Drug Application.
- **Balkrishna Industries:** Appointment of Mr. Saroj Kumar Khuntia as Chief Financial Officer upon the retirement of Mr. Madhusudan Bajaj, former CFO.
- **Bosch Home Comfort India:** Promoter Bosch Global Software Technologies will sell up to **19.64 lakh shares (7.22%)** of Bosch Home Comfort India through an OFS.
- **NIBE:** Showcases Garudastra (Long Range 120 mm Vehicle Mounted Mortar & Bomb System) and its precision strike capability using GPS and laser guidance to the Indian Army under NC-NC demonstration.
- **Mahindra & Mahindra:** Company diluted its stake in Mahindra Summit Agriscience post Summit Agro International subscription, reducing holding to 58.8% from 60%.
- **Waaree Renewable Technologies:** Received an additional commercial order for an existing solar project, increasing the contract value by Rs. 31 crore to Rs. 1,045 crore, with no change in terms.
- **HFCL:** Awarded a contract worth Rs. 2,666.09 crore by Rail Vikas Nigam, pertaining to the BharatNet Phase-III project in the Uttar Pradesh telecom circle.
- **Sumeet Industries:** Company is issuing rights shares of Rs. 2 face value at Rs. 11.86 each (Rs. 19,975.11 lakh total) in a ratio of 8 shares for every 25 shares held as of June 12, 2026.
- **EZE Networks:** Incorporation of arm Sovcloud Technologies. Equity shares subscribed by the company; 100% of the share capital of Sovcloud Technologies is held by the company, comprising 10,000 equity shares of Rs. 10 each.
- **Apollo Micro Systems:** Allotment of 3.80 crore warrants, each convertible into one equity share of face value of Rs. 1 each on a preferential basis.
- **Rail Vikas Nigam:** Received Letter of Acceptance (LoA) from East Coast Railway for construction of an important bridge, with an order size of Rs. 967.92 crore.
- **Sterlite Technologies:** Approval for raising funds through a Qualified Institutional Placement (QIP).
- **Lemon Tree Hotels:** Announces the opening of Lemon Tree Hotel, Sri Ganganagar. This opening marks the brand's entry into Sri Ganganagar and adds to its growing network of 23 hotels across Rajasthan.
- **Gujarat Gas:** Exchange approval for allotment of 62.27 crore equity shares of Rs. 2 each to eligible shareholders of Gujarat State Petroleum and Gujarat State Petronet.
- **Endurance Technologies:** Rs. 47.30 crore capital expenditure approved for setting up a greenfield manufacturing plant at Pune, Maharashtra, with capacity expandable to 35,000 lithium battery packs per month.
- **Gujarat Themis Biosyn:** Company has incorporated a step-down subsidiary in the name and style of Themis Biosyn in Ireland.

### US Futures Climb as Iran Deal Offsets Hawkish Fed

US stock futures rallied and oil prices retreated as President Donald Trump signed an interim deal to end the war with Iran and reopen the Strait of Hormuz, helping improve risk sentiment after the Federal Reserve's hawkish hold. Contracts on the S&P 500 climbed 0.9% while Nasdaq futures jumped nearly 1.5%. The moves followed a 1.2% decline in the US benchmark on Wednesday after the Fed signaled rates may need to rise further to contain inflation. Brent crude fell more than 1%, dropping below \$79 a barrel. A gauge of Asian stocks rose for a fifth day while Japan's Nikkei 225 jumped almost 2%. "The positive surprise for equities came from Trump's signing of the Memorandum of Understanding with Iran," said Rajeev De Mello, global macro portfolio manager at Gama Asset Management. "While markets had already been pricing a gradual normalization of shipping through the Strait of Hormuz, there had remained a meaningful risk of a last-minute collapse in negotiations. The agreement substantially reduces that tail risk." Trump told reporters he signed the document at the palace of Versailles near Paris, where he had dinner with French President Emmanuel Macron. The so-called memorandum of understanding is now in effect, a US official said. However, it was unclear if Iran had immediately begun taking steps to fully reopen the Strait of Hormuz.

### Oil Slides as Trump's Hormuz Agreement Lifts Outlook for Supply

Oil fell as an interim US-Iran peace deal went into effect, putting the focus on how quickly transits through the Strait of Hormuz can be ramped up as Persian Gulf producers restart shut-in fields. Brent sank toward \$78 a barrel after a modest gain on Wednesday, while West Texas Intermediate was near \$76. President Donald Trump said he had signed the deal, which envisions a rapid reopening of the critical waterway. US oil sanctions must now be lifted immediately, according to Iranian Foreign Ministry spokesman Esmail Baghaei. "Iran must be able to sell its oil, shipping and insurance must not face any issues, and the revenues from oil sales must also be received," he said on state television.

### LNG Tanker Heads Toward Hormuz as US-Iran Pact Goes Into Effect

A liquefied natural gas tanker that loaded in Qatar is nearing the Strait of Hormuz, a hint that traffic may increase after an interim US-Iran peace deal went into effect. The Mraikh, which picked up a shipment earlier this month, is heading toward the chokepoint after being stuck in the Persian Gulf since February, according to ship-tracking data. The vessel, which is chartered by QatarEnergy, is signaling Pakistan's Port Qasim as its next location. US President Donald Trump said he had signed the deal with Iran, which envisions a rapid reopening of the critical waterway. The closure of the Strait of Hormuz has curbed access to about a fifth of global LNG supply, with limited shipments going through by vessels that went dark — turning off their transponders to mask their locations — or with approval from Tehran.

### US-Iran Deal Takes Effect as Focus Turns to Strait of Hormuz

- President Donald Trump signed an interim deal to end the war with Iran and reopen the Strait of Hormuz, despite criticism from Republicans.
- The memorandum of understanding is now in effect, and it envisions the rapid reopening of the strait and immediate sanctions waivers for Iranian oil.
- The deal has prompted criticism from some of Trump's allies, who say it amounts to a victory for Tehran and that the US is conceding too much, with talks on nuclear issues and potential further financial gains for Iran to follow.

### Trump Blows Through His Iran Red Lines in Justifying Peace Deal

- President Donald Trump agreed to an interim peace deal with Iran, suggesting the country should have the right to enrich uranium, develop ballistic missiles, and access frozen funds.
- Trump's comments contradicted his previous stance on these issues, which he had cited as reasons why past presidents had failed to contain the threat posed by Iran.
- The interim deal opens the door for 60 days of negotiations, and Trump's administration has said Iran has been weakened economically and militarily, achieving the US goal of threat reduction.

### Auto / Auto Ancillaries

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### Oil & Gas

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[I Squared, US DFC to set up \\$3 billion energy infrastructure platform in Asia](#)

[Natural gas prices rebound as inventories tighten, LNG exports rise: Motilal Oswal](#)

[Trump vows to reimpose US sanctions on Russian crude 'soon' as truce with Iran takes shape](#)

[Iranian oil tankers pass US blockade after US-Iran deal, data shows](#)

### Metals/Mining/Power/Goods

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### Pharma/Fertilizers/Healthcare/Chemicals

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### Hospitality/Aviation

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