



Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	74,775.74	75,203.02	75,367.93	74,203.68	74,267.34	-508.40	- 0.68
NIFTY	23,547.75	23,654.50	23,733.70	23,357.95	23,382.60	-165.15	- 0.70

## SENTIMENT REMAINED DOWNBEAT AMID GLOBAL UNCERTAINTY

The 30-share BSE Sensex was down by 508.40 points or 0.68% to settle at 74,267.34 and the Nifty was down by 165.15 points or 0.70% to settle at 23,382.60. The BSE Small Cap 250 was down by 0.87% and BSE 500 was down by 0.96%. On the sectoral front, Metal and IT were gaining indices. On the flip side, Capital Goods, FMCG, Oil & Gas, Banks, Consumer Durables, Realty, Healthcare and Auto were losing indices. Tech Mahindra, Infosys, TCS, Indigo and HCL Tech were gainers on the Sensex; on the flip side, Hindustan Unilever, ITC, NTPC, Mahindra & Mahindra and Kotak Bank were the top losers on the Sensex. On global front, Asian markets shut the day on a green note and European indices are trading on a positive note.

Top Gainers			
Name	Closing Pr.	Previous Pr.	%Ch
TECHM	1,539.0	1,483.9	3.71
INFY	1,203.5	1,160.9	3.67
COALINDIA	473.25	457.90	3.35
JSWSTEEL	1,300.6	1,278.0	1.77
TCS	2,296.4	2,258.9	1.66

Top Losers			
Name	Closing Pr.	Previous Pr.	%Ch
HINDUNILVR	2,091.8	2,153.5	-2.87
TATACONSUM	1,145.0	1,178.4	-2.83
ITC	279.30	286.90	-2.65
SHRIRAMFIN	923.00	947.15	-2.55
M&M	2,970.0	3,045.6	-2.48

## MARKET STATS (NSE)

Most Active (by value)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,79,96,441	742.50	3,569.50
INFY	1,94,39,331	1,203.50	2,342.85
COALINDIA	4,77,16,517	473.25	2,235.57
TCS	75,05,095	2,296.40	1,726.78
M&M	57,63,247	2,970.00	1,725.64

Most Active (by volume)			
Name	Qty	Pr.	Value CR
HDFCBANK	4,79,96,441	742.50	3,569.5
COALINDIA	4,77,16,517	473.25	2,235.5
WIPRO	2,64,91,139	206.51	547.28
TATASTEEL	2,37,33,470	210.40	496.60
ITC	2,34,77,875	279.30	663.88



Indian equity benchmarks ended near the day's lows on Monday amid renewed uncertainty surrounding the potential US-Iran peace deal. After making a positive start, indices turned volatile amid continued selling by foreign institutional investors (FIIs). Selling pressure intensified in the second half of the session, with banking, FMCG, and auto stocks leading the fall, dragged the markets sharply lower. There was some cautiousness as the Finance Ministry's latest Monthly Economic Review, stated that the near-term outlook for the Indian economy is one of cautious resilience. It said with a below-normal monsoon forecast and a likely moderation in economic activity, overall consumption demand may face headwinds in the coming months. Traders overlooked think tank GTRI stating that the trade pact with Oman holds strategic significance for India, as much of Muscat's coastline lies outside the Strait of Hormuz, unlike other Gulf nations, enabling it to remain a reliable trade and energy gateway for India even during regional conflicts, disruptions or geopolitical instability.

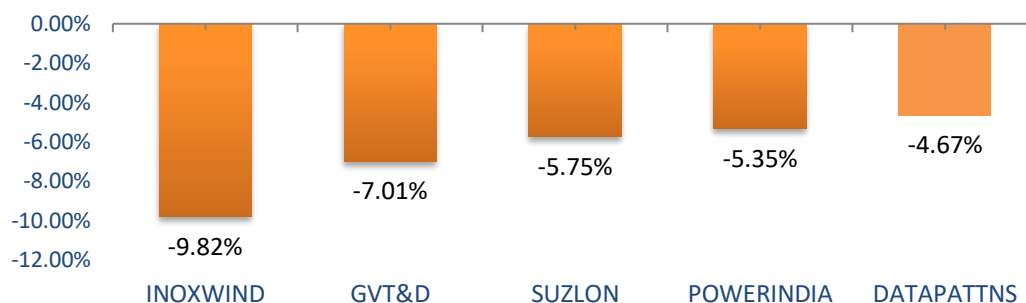
On the global front, European markets are trading mostly lower, as Germany's inflation slowed in May and unemployment declined unexpectedly in April. Asian markets ended mostly in green, despite China's manufacturing sector growth softened in May.

Source: AceEquity

### NEWS BULLETIN

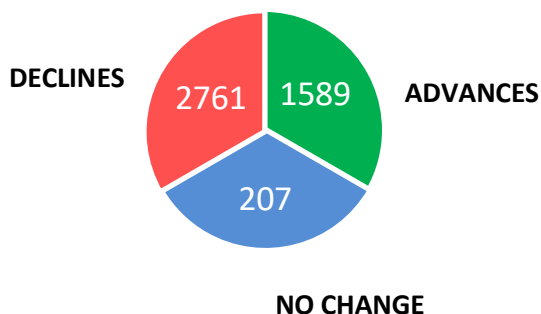
- **NMDC** has reported 35.02% rise in its net profit at Rs 2,020.13 crore for the quarter under review as compared to Rs 1,496.16 crore for the same quarter in the previous year. The total income of the company has increased by 55.84% at Rs 11,600.93 crore for Q4FY26 as compared to Rs 7,443.91 crore for the corresponding quarter previous year.
- **Aegis Logistics** has reported over two-fold jump in its net profit at Rs 524.31 crore for Q4FY26 as compared to Rs 225.64 crore for the same quarter in the previous year. The total income of the company has increased over two folds at Rs 1,951.71 crore for Q4FY26 as compared to Rs 950.60 crore for the corresponding quarter previous year.

### MARKET DRIVING SECTOR : CAPITAL GOODS

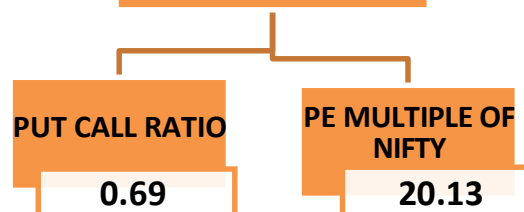


**S&P BSE: CAPITAL GOODS**  
**CLOSING: 78,848.83**  
**CHANGE: - 1,969.91**  
**CHANGE: - 2.44%**

### MARKET BREADTH – NEGATIVE



### RATIO ANALYSIS



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