

Market Commentary

Overnight global action:

On 30th June 2026, US market delivered a positive performance with S&P500 up by +55.3 pts (0.74%), Dow Jones up by +139.47 pts (0.27%) and Nasdaq up by +484.43 pts (1.63%). Gift Nifty grew by 38.5 pts (0.16%) indicating Indian markets will open positively.

Advance-Decline ratio on NSE was 1941:1383 and on BSE was 2248:1998 which showed balance in the overall markets.

Index Options Data Analysis:

Sensex max call OI is at 76000 max put OI is at 77000 with PCR of 0.72
Nifty max call OI is at 23850 max put OI is at 23900 with PCR of 0.79
Bank Nifty max call OI and put OI both are at 58000 with PCR of 0.98

Securities in Ban for F&O Trade:

NIL

Sector Performance:

NIFTY PRIVATE BANK index declined by -0.43% driven by ICICI Bank Ltd. (-0.9%) and Kotak Mahindra Bank Ltd. (-0.89%)

NIFTY OIL & GAS index grew by 0.17% driven by Mahanagar Gas Ltd. (+2.8%) and Hindustan Petroleum Corporation Ltd. (+1.24%)

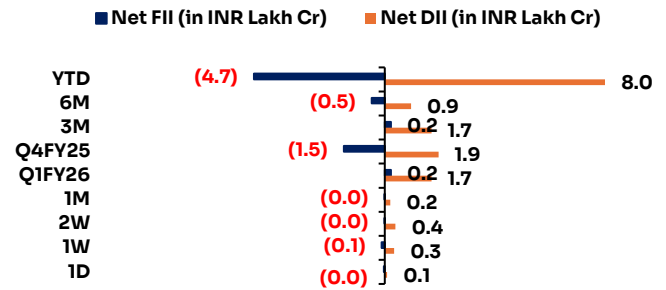
NIFTY MEDIA index declined by -0.05% driven by D.B. Corp Ltd. (-1.5%) and Saregama India Ltd. (-1.48%)

NIFTY PSU BANK index declined by -0.72% driven by Central Bank Of India (-3.2%) and Bank Of Maharashtra (-3.24%)

Now listen to the daily market update



Fund Flow	Buy	Sell	Net
FII/FPI	23,274	25,830	-2,557
DII	23,433	16,590	6,842



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,043	0.2%	-8.5%	21.8
Sensex 30	76,479	-0.3%	-10.3%	20.0
Nifty 50	23,866	-0.3%	-8.7%	21.6
India VIX	13	-1.0%	42.2%	
Nifty Bank	57,543	-0.3%	-3.4%	16.9
Nifty Next 50	71,629	0.2%	3.3%	71.6
Nifty 500	22,996	0.0%	-3.7%	21.6
Nifty Mid 100	61,798	0.4%	2.2%	31.8
Nifty Small 250	17,720	0.6%	6.2%	29.8
USD/INR	95	0.1%	5.3%	
India 10Y	6.8%			
India 2Y	6.0%			
India 1Y	5.7%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,496	0.7%	9.5%	32.4
Dow Jones	52,322	0.3%	8.9%	25.3
Nasdaq 100	30,259	1.6%	19.8%	49.7
FTSE 100	10,497	0.1%	5.7%	16.6
CAC 40	8,404	0.4%	3.1%	24.6
DAX	24,979	1.4%	2.0%	26.0
Nikkei 225	70,062	0.9%	39.2%	37.4
Hang Seng	22,881	-0.6%	-10.7%	11.1
Shanghai Cor	4,094	0.5%	3.2%	18.5
KOSPI	8,476	1.0%	101.1%	42.0
S&P/ASX 200	8,779	-0.5%	0.7%	23.2

Stocks in the News

TATA MOTORS PASSENGER VEHICLES LTD. (CMP: 352, MARKET CAP: 129701 Cr., SECTOR: AUTOMOBILES - PASSENGER CARS)

The company has announced an upward price revision of up to 1.5% across its entire portfolio of internal combustion engine (ICE) and electric passenger vehicles (EVs) effective July 1, 2026. This tactical intervention is designed to protect gross margins against persistent raw material inflation and sustained core input cost pressures. Analysts expect this marginal pass-through to neutralize near-term headwinds without triggering a significant demand contraction, given aggressive promotional pipelines deployed in the preceding month. [Economic Times](#)

INFOSYS LTD. (CMP: 1001, MARKET CAP: 406001 Cr., SECTOR: IT - SOFTWARE)

The company enters the July session under intense technical distribution after a coordinated 2.96% selloff dragged the stock down to ₹1,006.00 amid global macro anxieties. Heavy institutional-level sector rotation has testing critical support zones near the ₹992-₹1,008 band, with near-term momentum heavily indexing on stabilizing software delivery metrics. The sharp drawdown reflects near-term caution regarding cross-border corporate tech spending, positioning the stock as a key lead indicator for broader Nifty IT index volatility. [Univest](#)

HDFC BANK LTD. (CMP: 798, MARKET CAP: 1229642 Cr., SECTOR: BANK - PRIVATE)

The private banking heavyweight has implemented revised structural terms for its premium credit card ecosystem starting July 1, 2026, transitioning to a strict spend-based eligibility framework requiring a minimum expenditure of ₹60,000 in the preceding quarter for lounge access. This optimization is aimed at lowering operational fee leakages and improving credit vertical profitability profiles. Concurrently, the counter remains a vital defensive play as the broader banking system navigates new central bank frameworks on commercial product mis-selling taking effect this month. [Economic Times](#)

STATE BANK OF INDIA LTD. (CMP: 1027, MARKET CAP: 948077 Cr., SECTOR: BANK - PUBLIC)

Through its credit card arm, SBI Cards and Payment Services, the lender has initiated strict modifications to its transaction reward programs for strategic co-branded cards, including the PhonePe SBI Credit Card variants, effective July 1, 2026. The restructuring imposes distinct caps on point accumulation and expands non-eligible transaction categories to optimize fee margins. This policy change converges with systemic banking structural updates aimed at reducing credit card leverage lines, maintaining strong institutional volume on the counter. [Economic Times](#)

Sectoral Inde

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	26,480	0.2%	-6.1%	21.8
Nifty IT	26,299	-2.7%	-30.6%	20.5
Nifty Fin Ser	26,555	-0.2%	-3.8%	17.3
Nifty Pharma	25,326	0.4%	11.5%	41.7
Nifty Services	30,505	-0.4%	-9.4%	33.6
Nifty Cons Du	36,443	1.2%	-0.9%	49.4
Nifty PSE	9,981	0.1%	1.3%	10.5
Nifty FMCG	48,794	-0.7%	-12.0%	33.6
Nifty Pvt Bank	27,929	-0.4%	-2.8%	10.4
Nifty PSU Banl	8,493	-0.7%	-0.5%	13.9
Nifty Cons	11,515	0.2%	-6.3%	40.7
Nifty Realty	830	1.3%	-5.5%	36.1
Nifty Infra	9,392	0.1%	-2.3%	21.8
Nifty Energy	39,741	0.1%	12.5%	12.6
Nifty Health	16,140	0.2%	10.2%	38.6
Nifty India Mfg	15,876	0.4%	3.0%	29.6
Nifty Metal	12,519	-0.2%	12.1%	22.4
Nifty Oil & Gas	11,030	0.2%	-9.8%	16.9

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
OFSS	15.9	1.6
INDIGO	7.4	4.1
UPL	7.0	0.5
OBEROIRLTY	6.6	3.1
ALKEM	6.5	0.2
Short		
IRFC	13.8	-0.9
SWIGGY	9.4	-1.4
DMART	8.9	-2.8
NATIONALUM	7.5	-1.1
POWERINDIA	6.4	0.0
Long Unwinding		
SAMMAANCAP	-5.0	-0.2
PGEL	-3.4	-0.1
MAXHEALTH	-2.9	-0.1
GMRAIRPORT	-2.5	-1.8
VOLTAS	-1.8	-0.8
Short Covering		
IREDA	-16.0	1.5
LTF	-15.0	0.3
MUTHOOTFIN	-13.0	0.1
RVNL	-12.5	3.2

BAJAJ AUTO LTD. (CMP: 9714, MARKET CAP: 271493 Cr., SECTOR: AUTOMOBILE TWO & THREE WHEELERS)

The multi-billion equity buyback program of the auto major officially commences on July 1, 2026, totaling up to ₹5,632.80 crore. The buyback is structured via the tender offer route for up to 46.94 lakh fully paid-up equity shares at a fixed premium price of ₹12,000 per share. This significant cash-payout deployment underlines strong balance sheet health and corporate commitment to value unlocking, providing strong downside support to the stock's near-term structural momentum. [Upstox](#)

Commodity:	CMP	1D	YTD
Gold (\$)	4,047	0.2%	0.3%
Silver (\$)	60.1	2.5%	0.1%
Brent Oil (\$)	72.9	-0.3%	-0.2%
WTI Oil (\$)	69.4	-2.0%	-20.6%

Currency	CMP	1D	YTD
USD/INR	94.7	0.1%	0.0%
EUR/INR	108.1	0.2%	0.1%
GBP/INR	125.5	0.2%	0.1%
JPY/INR	0.6	-0.3%	0.1%
EUR/USD	1.1	0.0%	0.1%

Securities Lending & Borrowing Scheme (SLBS)

Company	Under.Ltp	Fut.Ltp	Spread (%)
DALBHARAT	1,700.10	1,681.20	1.11
CROMPTON	274.60	272.50	0.76
IEX	125.09	124.14	0.76
ALKEM	5,599.00	5,556.50	0.76
MFSL	1586	1573.9	0.76

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
APOLLOHOSP	8,669	8,770	8,734	29-Jun-26
AUROPHARMA	1,574	1,589	1,585	29-Jun-26
FEDERALBNK	329	332	327	29-Jun-26
AIAENG	5,052	5,180	5,060	23-Jun-26
ATHERENERG	1,110	1,147	1,098	29-Jun-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
INFY	1,006	996	1,026	23-Jun-26
ONGC	235	228	229	17-Dec-25
HCLTECH	1,072	1,069	1,086	29-Jun-26
PERSISTENT	4,326	4,245	4,265	29-Jun-26
PATANJALI	409	406	408	29-Jun-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
DIVGIITS	6,111	1,257	652	1,005
SIGNPOST	10,064	2,101	1,164	278
JINDALPHOT	241	51	27	1,220
VELJAN	9	2	1	1,432
GUFICBIO	8,346	1,767	917	405
SMSPHARMA	7,824	1,667	879	412
MFML	111	24	13	21
IVALUE	10,486	2,284	1,389	264
MONEYBOXX	612	135	75	70
GENUSPOWER	65,893	14,627	7,802	300
JAGSNPHARM	10,200	2,296	1,213	240
SUPREMEINF	954	215	140	81
LICNMID100	198	46	25	62
MAHAPEXLTD	116	27	17	45
NEOGEN	863	207	155	2,030
PROZONER	2,556	616	385	46
BEEKAY	54	13	7	412
BSL	117	29	16	136
GROWWLOVOL	309	76	50	10
APLLTD	919	234	182	825
KRISHNADEF	1,569	401	309	1,205
DEVIT	540	145	88	29
QUESS	3,938	1,061	757	268
ITADD	864	234	318	28

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
ATALREAL	Acme Capital Market Limited	BUY	932	28.2
ATALREAL	Altizen Ventures Llp	BUY	908	28.2
ATALREAL	Altizen Ventures Llp	SELL	1401	28.2
ATALREAL	Bullpulse Marketedge Private Limited	SELL	747	28.0
ATALREAL	Bullpulse Marketedge Private Limited	BUY	747	28.1
ATALREAL	Manish N Thakur	SELL	1461	28.3
ATALREAL	Qe Securities Llp	SELL	609	28.2
ATALREAL	Qe Securities Llp	BUY	653	28.2
BANG	Sandeep Jain	BUY	85	28.7
BANG	Sway Financial Services	BUY	1	28.3
BANG	Sway Financial Services	SELL	98	28.8
DIGIKORE	K3 Fortune Llp	SELL	92	48.7
DIGIKORE	K3 Fortune Llp	BUY	92	54.1
DIVGIITTS	Junomoneta Finsol Private Limited	SELL	159	985.2
DIVGIITTS	Junomoneta Finsol Private Limited	BUY	162	984.6
DIVGIITTS	Nk Securities Research Private Limited	SELL	262	982.2
DIVGIITTS	Nk Securities Research Private Limited	BUY	262	981.6
DIVGIITTS	Nrjn Family Trust	SELL	175	964.7
DIVGIITTS	Qe Securities Llp	SELL	166	980.9
DIVGIITTS	Qe Securities Llp	BUY	168	982.5
FILATFASH	Prabhat Sethia	SELL	72074	0.2
GCSL	Mansukh Securities & Finance Limited	SELL	72	431.0
GCSL	Mansukh Securities & Finance Limited	BUY	124	430.0
GENUSPOWER	Buoyant Opportunities Strategy	BUY	2241	290.0
GENUSPOWER	Buoyant Opportunities Strategy-iii	BUY	2241	290.0
GENUSPOWER	Chiswick Investment Pte Ltd	SELL	10345	290.0
GENUSPOWER	D3 Stock Vision Llp	BUY	531	292.5
GENUSPOWER	D3 Stock Vision Llp	SELL	2051	288.4
GENUSPOWER	Irage Broking Services Llp	BUY	707	291.0
GENUSPOWER	Irage Broking Services Llp	SELL	3895	287.5
GENUSPOWER	Mansi Share And Stock Broking Private Limited	BUY	342	288.7
GENUSPOWER	Mansi Share And Stock Broking Private Limited	SELL	1776	292.4
GENUSPOWER	Marwadi Chandarana Intermediaries Brokers Private Limit	BUY	1909	295.6
GENUSPOWER	Marwadi Chandarana Intermediaries Brokers Private Limit	SELL	2144	291.6
GENUSPOWER	Profitex Shares & Securities Private Limited	BUY	4483	290.0
GOCOLORS	Ramdoot Realtors Pvt Ltd	SELL	205	391.2
GOCOLORS	Ramdoot Realtors Pvt Ltd	BUY	270	393.5
INDOTECH	Shirdi Sai Electricals Limited	SELL	68	3,231.2
INDOWIND	Indus Capital Private Limited	BUY	2279	9.2
INDOWIND	Indus Finance Corporation Ltd	SELL	2000	9.2
IVALUE	360 One Pipe Fund	BUY	1923	260.0
IVALUE	Bengal Finance & Investment Pvt. Ltd.	BUY	300	262.1
IVALUE	D3 Stock Vision Llp	SELL	317	261.1
IVALUE	D3 Stock Vision Llp	BUY	325	260.3

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
IVALUE	Dhwaja Shares & Securities Pvt Ltd	SELL	83	265.6
IVALUE	Dhwaja Shares & Securities Pvt Ltd	BUY	318	261.4
IVALUE	F3 Advisors Private Limited	SELL	563	261.6
IVALUE	F3 Advisors Private Limited	BUY	610	260.6
IVALUE	Mansi Share And Stock Broking Private Limited	SELL	500	262.0
IVALUE	Mansi Share And Stock Broking Private Limited	BUY	500	260.1
IVALUE	Neo Apex Venture Llp	SELL	486	261.0
IVALUE	Neo Apex Venture Llp	BUY	486	260.3
IVALUE	Sundara (Mauritius) Limited	SELL	5698	260.2
JAGSNPHARM	Nk Securities Research Private Limited	SELL	658	254.5
JAGSNPHARM	Nk Securities Research Private Limited	BUY	658	254.4
JAGSNPHARM	Qe Securities Llp	SELL	393	258.7
JAGSNPHARM	Qe Securities Llp	BUY	396	248.8
KRISHNADEF	360 One Pipe Fund	BUY	442	1,203.5
KRISHNADEF	Ankur Ashwin Shah	SELL	400	1,202.0
KRISHNADEF	Bhavin Yashodhan Mehta	SELL	116	1,203.7
KRISHNADEF	Bhavin Yashodhan Mehta	BUY	116	1,201.2
KRISHNADEF	Mansi Share And Stock Broking Private Limited	SELL	206	1,211.2
KRISHNADEF	Mansi Share And Stock Broking Private Limited	BUY	225	1,201.2
KRISHNADEF	Neo Apex Share Broking Services Llp	SELL	73	1,202.6
KRISHNADEF	Neo Apex Share Broking Services Llp	BUY	93	1,204.2
KRISHNADEF	Pallavi Ashwin Shah	SELL	150	1,204.9
KRISHNADEF	Preyal Ankur Shah	SELL	150	1,203.7
KRISHNADEF	Swetaben Hardik Shah	BUY	92	1,201.3
KRISHNADEF	Swetaben Hardik Shah	SELL	92	1,205.4
LAMOSAIC	Abdulrasul Akbarali Hamid	BUY	60	33.5
LAMOSAIC	Nidhi Hasmukh Solanki	BUY	74	33.5
LAMOSAIC	Vishal Mahesh Waghela	SELL	209	33.5
MADHUSUDAN	Compact Structure Fund	SELL	97	215.3
MAGSON	Orvanta Corporation Llp	BUY	110	170.0
MARKOLINES	Hi Klass Trading & Investment Limited	SELL	51	180.1
MARKOLINES	Hi Klass Trading & Investment Limited	BUY	117	179.7
MARKOLINES	Vistaar Trading Service Private Limited	SELL	136	179.8
MARKOLINES	Vistaar Trading Service Private Limited	BUY	136	179.3
MFML	Rikant Pittie	SELL	55	21.2
MHLXMIRU	Marwadi Chandarana Intermediaries Brokers Private Limit	SELL	102	121.1
MOREPENLAB	Hrti Private Limited	SELL	2198	59.1
MOREPENLAB	Hrti Private Limited	BUY	2834	58.9
MOTISONS	Arihant Capital Markets Limited	BUY	6206	14.1
MOTISONS	Arihant Capital Markets Limited	SELL	7070	14.1
NARMADA	Msb E Trade Securities Limited	SELL	377	40.2
NARMADA	Msb E Trade Securities Limited	BUY	377	40.0
NARMADA	Qe Securities Llp	BUY	224	40.0
NARMADA	Qe Securities Llp	SELL	225	40.2
NARMADA	Sachin Govindlal Modi	SELL	347	40.3
NARMADA	Sachin Govindlal Modi	BUY	565	40.3
OLAELEC	Jump Trading Financial India Private Limited	SELL	39136	43.6

OLAELEC	Jump Trading Financial India Private Limited	BUY	39136	43.6
OLIL	Bonanza Portfolio Ltd	BUY	44	421.5
PROZONER	Apax Trust	BUY	1303	44.7
RAMCOSYS	Hrti Private Limited	SELL	732	827.5
RAMCOSYS	Hrti Private Limited	BUY	733	829.0
RAMCOSYS	Irage Broking Services Llp	SELL	327	829.1
RAMCOSYS	Irage Broking Services Llp	BUY	455	841.9
RAMCOSYS	Junomoneta Finsol Private Limited	BUY	873	833.0
RAMCOSYS	Junomoneta Finsol Private Limited	SELL	877	833.4
RAMCOSYS	Microcurves Trading Private Limited	SELL	422	835.8
RAMCOSYS	Microcurves Trading Private Limited	BUY	422	835.6
RAMCOSYS	Musigma Securities	BUY	202	834.0
RAMCOSYS	Musigma Securities	SELL	202	834.3
RAMCOSYS	Nk Securities Research Private Limited	BUY	257	839.2
RAMCOSYS	Nk Securities Research Private Limited	SELL	257	839.6
RAMCOSYS	Qe Securities Llp	BUY	382	831.8
RAMCOSYS	Qe Securities Llp	SELL	382	830.7
RATNAVEER	Arihant Capital Markets Limited	SELL	403	185.1
RATNAVEER	Arihant Capital Markets Limited	BUY	403	184.3
RBA	Rajasthan Global Securities Pvt Ltd	BUY	809	79.5
RBA	Rajasthan Global Securities Pvt Ltd	SELL	3000	79.7
RBA	Yogesh Mannalal Agrawal	BUY	3440	79.4
SAKSOFT	Blitzquant Research Llp	SELL	1973	204.3
SAKSOFT	Blitzquant Research Llp	BUY	1973	204.2
SAKSOFT	Cit Research Tech Private Ltd	BUY	1142	205.6
SAKSOFT	Cit Research Tech Private Ltd	SELL	1142	205.8
SAKSOFT	Dipan Mehta Commodities Private Limited	SELL	2423	204.5
SAKSOFT	Dipan Mehta Commodities Private Limited	BUY	2423	204.1
SAKSOFT	Elixir Wealth Management Private Limited	SELL	3133	205.6
SAKSOFT	Elixir Wealth Management Private Limited	BUY	3159	205.4
SAKSOFT	Grt Strategic Ventures Llp	BUY	1200	205.2
SAKSOFT	Grt Strategic Ventures Llp	SELL	1200	205.3
SAKSOFT	Hrti Private Limited	SELL	2891	203.9
SAKSOFT	Hrti Private Limited	BUY	3012	204.1
SAKSOFT	Irage Broking Services Llp	SELL	1455	204.8
SAKSOFT	Irage Broking Services Llp	BUY	1798	202.8
SAKSOFT	J4S Financial Solutions Llp	SELL	747	203.7
SAKSOFT	J4S Financial Solutions Llp	BUY	747	203.4
SAKSOFT	Jump Trading Financial India Private Limited	SELL	1547	204.6
SAKSOFT	Jump Trading Financial India Private Limited	BUY	1547	204.6
SAKSOFT	Junomoneta Finsol Private Limited	BUY	7225	203.9
SAKSOFT	Junomoneta Finsol Private Limited	SELL	7278	204.0
SAKSOFT	Marwadi Chandarana Intermediaries Brokers Private Limit	SELL	832	204.0
SAKSOFT	Marwadi Chandarana Intermediaries Brokers Private Limit	BUY	832	204.5
SAKSOFT	Microcurves Trading Private Limited	SELL	5176	205.2
SAKSOFT	Microcurves Trading Private Limited	BUY	5176	205.1
SAKSOFT	Nk Securities Research Private Limited	SELL	4881	203.9
SAKSOFT	Nk Securities Research Private Limited	BUY	4881	203.8
SAKSOFT	Pace Commodity Brokers Private Limited	SELL	719	204.1
SAKSOFT	Pace Commodity Brokers Private Limited	BUY	719	204.0

SAKSOFT	Plutus Research Private Limited	SELL	1133	204.7
SAKSOFT	Plutus Research Private Limited	BUY	1133	204.6
SAKSOFT	Qe Securities Llp	BUY	3630	205.4
SAKSOFT	Qe Securities Llp	SELL	3689	204.0
SAKSOFT	Share India Securities Limited	SELL	1232	206.7
SAKSOFT	Share India Securities Limited	BUY	1232	206.7
SAKSOFT	Silverleaf Capital Services Private Limited	SELL	920	201.9
SAKSOFT	Silverleaf Capital Services Private Limited	BUY	920	201.7
SAKSOFT	Two Roads Trading Private Limited	SELL	948	205.1
SAKSOFT	Two Roads Trading Private Limited	BUY	948	205.1
SAKSOFT	Vinsul Makardi Ltd	SELL	740	203.1
SAKSOFT	Vinsul Makardi Ltd	BUY	740	203.0
SHANKARA	Rajasthan Global Securities Pvt Ltd	BUY	47	126.0
SHANKARA	Rajasthan Global Securities Pvt Ltd	SELL	1000	127.3
SHANKARA	The Ballygunge Family Trust	BUY	1002	127.3
SHANTIGOLD	Arihant Capital Markets Limited	SELL	461	225.7
SHANTIGOLD	Arihant Capital Markets Limited	BUY	604	226.4
SIGNPOST	Junomoneta Finsol Private Limited	BUY	315	277.2
SIGNPOST	Junomoneta Finsol Private Limited	SELL	321	277.4
SIGNPOST	Microcurves Trading Private Limited	BUY	453	278.2
SIGNPOST	Microcurves Trading Private Limited	SELL	453	278.3
SIGNPOST	Nk Securities Research Private Limited	BUY	339	278.5
SIGNPOST	Nk Securities Research Private Limited	SELL	339	278.7
SIGNPOST	Silverleaf Capital Services Private Limited	BUY	310	278.2
SIGNPOST	Silverleaf Capital Services Private Limited	SELL	310	278.2
STYLEBAAZA	Shree Capital Services Ltd	SELL	574	252.7
TICL	Shrish Tapuria	SELL	975	14.7
UCL	Manish Shivnarayan Pancholi	BUY	150	185.4
UCL	Orvanta Corporation Llp	SELL	144	185.4
URAVIDEF	Rakesh Kumar Aggarwal	SELL	287	116.0

Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price
GENUSPOWER	BUOYANT OPPORTUNITIES STRATEGY	BUY	22,41,379	290.0
GENUSPOWER	BUOYANT OPPORTUNITIES STRATEGY-III	BUY	22,41,379	290.0
GENUSPOWER	CHISWICK INVESTMENT PTE LTD	SELL	1,03,44,827	290.0
GENUSPOWER	MADHURI MADHUSUDAN KELA	BUY	13,79,310	290.0
GENUSPOWER	PROFITEX SHARES & SECURITIES PRIVATE LIMITED	BUY	44,82,759	290.0

Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

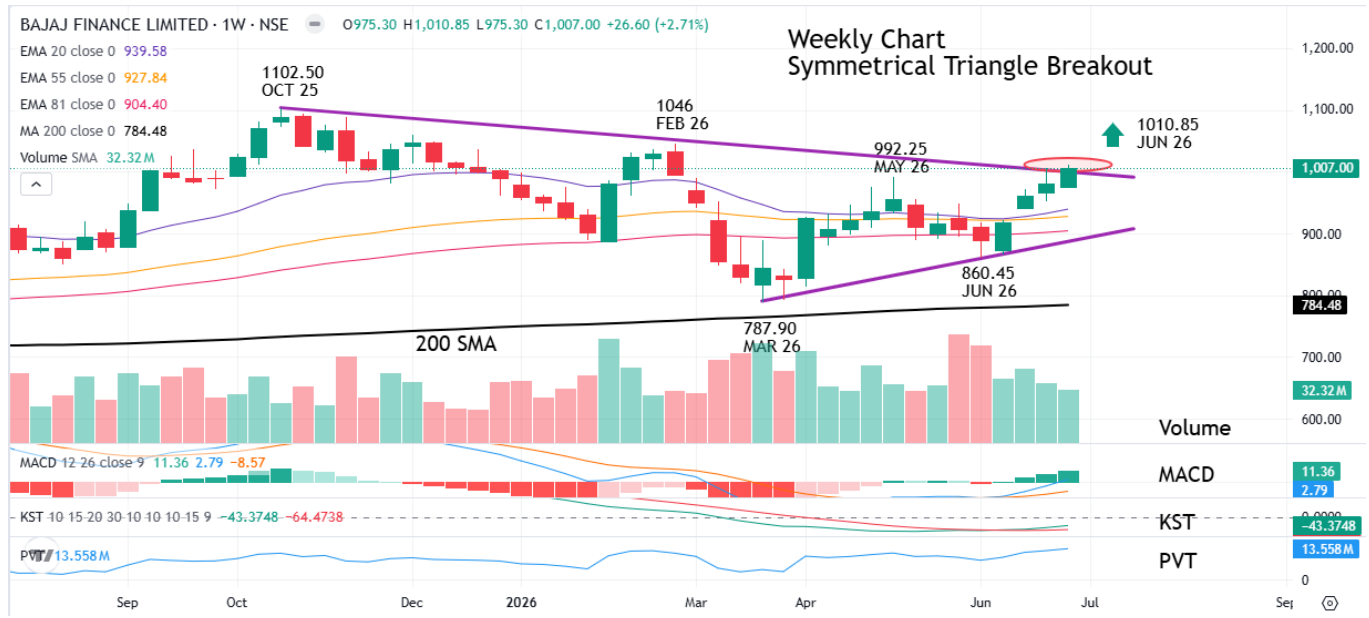
Company	Purpose
Netweb Technologies India Limited	Fund Raising
Shivam Autotech Limited	Fund Raising/Other business matters
Vikas EcoTech Limited	Financial Results/Other business matters
Zee Entertainment Enterprises Limited	Fund Raising

Nifty & Bank Spot – Pivot Levels 01/07/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23865.75	23784	23703	23578	23990	24115	24196
Bank Nifty	57542.90	57328	57114	56773	57883	58224	58438

Bajaj Finance Ltd – Technical Stock Call – 01/07/2026

Technical Stock Call	Action	Reco	Target	Support	SL
BAJFINANCE	BUY	1007	1300	(975-934-895)	860



View – Medium Term Bullish

The stock commenced its downtrend from 1102.50 (OCT 25). Stock started trading below the averages & forming lower tops, extended the decline marking a low of 787.90 (MAR 26).

Later, buying emerged & the stock commenced its up move & reached a high of 992.25 (MAY 26), but faced resistance in that area & witnessed a minor correction. However, as observed in the charts, the stock entered into a consolidation zone during the period MAR 26_JUN 26, trading around the averages seeking trend direction.

Recently in the month of JUN 26, after forming higher bottoms at 860.45 & following Up Gaps, the stock has given a **Symmetrical Triangle Breakout** supported by volume with a Bullish candle reaching to a high of 1010.85, which is higher than the previous swing highs.

MACD, KST & PVT indicators suggest Positive crossover. The 200 SMA is in rising mode.

Target of **1300** is expected with lower support levels at **(975-934-895)** in case of intermediate fall. A stop loss at **860** is to be followed for the trade.

All the calls/opinions are subject to Disclosures and Disclaimer <http://goo.gl/8bCMyQ>

Global Macro Events (1st July 2026)		
Event	Previous	Forecasted
India		
Government Budget Value MAY	INR-3623B	INR-5500.0B
USA		
Redbook YoY JUN/27	0.1	
S&P/Case-Shiller Home Price YoY APR	0.9%	0.008
House Price Index APR	441.8	442.4
House Price Index MoM APR	0.2%	0.002
House Price Index YoY APR	1.8%	0.021
S&P/Case-Shiller Home Price MoM APR	1.1%	0.007
Chicago PMI JUN	62.7	61
JOLTs Job Openings MAY	7.585M	7.4M
CB Consumer Confidence JUN	90.6	94
JOLTs Job Quits MAY	3.043M	2.96M
Dallas Fed Services Index JUN	-7.7	-4
Dallas Fed Services Revenues Index JUN	5	6
6-Week Bill Auction	0.0362	
Quarterly Grain Stocks - Corn JUN	9.02B	
Quarterly Grain Stocks - Soy JUN	2.10B	
Quarterly Grain Stocks - Wheat JUN	1.30B	
API Crude Oil Stock Chang		
China		
NBS Manufacturing PMI JUN	50	50.3
NBS Non Manufacturing PMI JUN	50.1	50.5
NBS General PMI JUN	50.5	50.7
Great Britain		
BRC Shop Price Inflation JUN	0.012	0.014
Current Account Q1	£-27.2B	£ -24B
Business Investment QoQ Final Q1	-3%	0.007
Business Investment YoY Final Q1	0.018	-0.018
GDP Growth Rate QoQ Final Q1	0.1%	0.006

#STOCK SPECIFIC NEWS

Reliance Industries Ltd

The conglomerate is set to enter its mandatory trading window closure period from July 1, 2026, ahead of its upcoming quarterly financial disclosures. Behind-the-scenes structuring continues to accelerate for its telecom arm, Jio Platforms, aiming to navigate complex regulatory clearances for its proposed multi-billion market debut. The counter ended its previous session at ₹1,294.50, remaining the dominant anchor for structural index positioning as brokerage targets cluster around the ₹1,610.00 base. [Trendlyne](#)

Tata Consultancy Services Ltd

The IT bellwether closed down 3.17% at ₹2,031.50 as institutional de-risking swept through Indian technology heavyweights at the close of the quarter. Market operators indicate that the uniform correction signals an industry-wide tactical reallocation rather than an idiosyncratic breakdown. Traders are eyeing immediate entry setups in the ₹2,018–₹2,045 zone with near-term resistance parameters moving down to ₹2,070.00. [Univest](#)

Wipro Ltd

The stock fell 2.90% to end the tracking period at ₹170.39, moving in tandem with broader software services benchmarks amid changing cross-border capital distributions. Momentum oscillators have entered near-oversold territory, with secondary support established by market desks at ₹168.00. Near-term price discovery remains tethered to stabilizing international contract renewals and managing supply-side talent costs. [Univest](#)

Maruti Suzuki India Ltd

The automobile manufacturer witnessed sharp institutional accumulation ahead of the publication of its June automotive sales metrics. Solid volume accretion during late-market hours provided notable relative strength against weak broader index trends. Operational focus continues to track core entry-level demand dynamics and component supply continuity heading into the second quarter. [Univest](#)

BSE Ltd

The exchange platform faces short-term transaction revenue headwinds as stringent central bank credit restrictions on third-party proprietary desk funding take full effect on July 1, 2026. Historical tracking establishes that leveraged institutional proprietary trading accounts for 12% to 15% of daily exchange turnover metrics. Institutional desks expect higher near-term impact costs on large block orders, forcing a tactical pivot toward retail and mutual fund volumes to offset potential transaction fee compression. [Sahi News](#)

Aastha Spintex Ltd

The company's public issuance window closed its initial subscription book building process leading into the July settlement period. The company is seeking to deploy the net proceeds toward expanding localized capital asset base infrastructure and meeting working capital requirements. The secondary market is closely monitoring final listing allocations to assess liquidity trends in small-to-midcap textile manufacturing setups. [Upstox](#)

Knack Packaging Ltd

The corporate enterprise finalized its structural primary market placement guidelines ahead of its forthcoming domestic stock market debut. The asset allocation program focuses on scaling up high-volume industrial packaging capacities to capture growing manufacturing demand. Early analyst reviews indicate the issue serves as an important proxy for tracking mid-tier logistical and consumer packaging supply chains. [Upstox](#)

Advit Jewels Ltd

The corporate entity progressed its primary listing framework as gray market premium indicators fluctuated ahead of formal exchange trading. The capital structure adjustment focuses on scaling up organized retail market networks and inventory optimization models. Final trade settlement and listing metrics will establish valuation benchmarks for the consumer retail luxury ecosystem. [Economic Times](#)

National Stock Exchange of India Ltd

The market infrastructure institution is seeing accelerated positioning ahead of its highly anticipated public market debut, which will act as a major liquidity test for the domestic financial ecosystem. Simultaneously, the platform is collaborating with co-exchanges to introduce unified foreign investment access hubs effective July 1, 2026. The structural integration aims to streamline cross-border investment flows, supporting long-term institutional volume metrics. [Trendlyne](#)

Central Depository Services (India) Ltd

The market intermediary has joined forces with major financial infrastructure operators to activate the 'India Market Access' infrastructure starting July 1, 2026. This institutional platform functions as a single-window onboarding vehicle for incoming Foreign Portfolio Investors (FPIs). Financial analysts project this digitized framework will boost new account additions and transaction fee volumes over coming quarters. [SEBI](#)

National Securities Depository Ltd

The depository infrastructure entity has operationalized centralized administrative pipelines under a joint regulatory framework to simplify asset onboarding for global asset managers. The digital gateway removes multi-layered verification bottlenecks across domestic custody channels. This systemic operational shift is expected to enhance operational efficiency and custodian fee tracking models over the long term. [SEBI](#)

Indian Clearing Corporation Ltd

The clearing infrastructure operator has integrated its risk management nodes into the newly launched unified international investor onboarding network starting July 1, 2026. The processing upgrades are designed to optimize collateral tracking and post-trade settlement loops for offshore institutions. Operational experts expect these structural enhancements to reduce localized systemic settlement friction points. [SEBI](#)

NSE Clearing Ltd

The institutional clearing arm has successfully deployed updated clearing frameworks synchronized with the multi-depository foreign capital access program launching this July. The system updates target the reduction of margin compression risk profiles for institutional portfolios. This procedural shift is expected to improve institutional execution metrics across high-volume derivative segments. [SEBI](#)

HCL Technologies Ltd

The corporate entity experienced broad institutional distribution as sectoral reallocations impacted large-cap domestic IT providers at the turn of the month. The stock closed over 2.50% lower, tracking peer software majors amid shifting international corporate IT budgets. Technical indicators place primary support parameters near previous multi-month consolidating bases. [Univest](#)

##CORPORATE ANNOUNCEMENTS

Reliance Industries Ltd / Trading Window Closure Announcement

The corporation submitted an official exchange disclosure confirming that its mandatory trading window closure period will commence on July 1, 2026, in compliance with standard insider trading prevention guidelines. The restriction applies to directors, designated promoters, and affiliated connected entities, and will extend until 48 hours after the formal release of its quarterly financial statements. This operational filing halts internal equity accumulation ahead of key financial performance reviews. [Official Filing](#)

Tata Motors Passenger Vehicles Ltd / Strategic Price Revision Notification

The automotive manufacturer filed a comprehensive regulatory report formalizing a retail price increase of up to 1.5% across its entire vehicle matrix effective July 1, 2026. The announcement details the implementation scope across all conventional internal combustion configurations and battery-electric models to offset raw material cost increases. This filing establishes updated commercial pricing lines across its national dealership network. [Official Filing](#)

Bajaj Auto Ltd / Buyback Execution Commencement Disclosure

The company submitted official regulatory documentation detailing the operational schedule for its ₹5,632.80 crore equity buyback program starting July 1, 2026. The filing confirms the repurchase parameters for up to 46.94 lakh shares of face value ₹10 at an premium tender price of ₹12,000 per share. The disclosure outlines the cash payout mechanism and the subsequent capital reduction roadmap. [Official Filing](#)

Securities and Exchange Board of India / Executive Placement Invitation

The market regulator issued an official administrative announcement opening applications for the position of Executive Director, with the application window running from June 26 through July 25, 2026. The executive search aims to strengthen underlying supervisory capabilities and regulatory enforcement mechanisms across market segments. This placement process will shape policy oversight frameworks for market intermediaries. [Official Filing](#)

###MACRO / NON-STOCK NEWS

RBI Proprietary Funding Curbs / Capital Market Liquidity Implications

The Reserve Bank of India's stringent regulatory restrictions on bank funding lines for proprietary trading desks take full effect on July 1, 2026. This systemic policy pivot aims to insulate bank balance sheets from equity market volatility, but is expected to trigger short-term liquidity contraction, potentially affecting 12% to 15% of daily transaction turnover on the BSE. Institutional trading desks project a near-term widening of bid-ask spreads and higher impact costs for large institutional block trades as leveraged players adjust their positioning. [Bloomberg](#)

Banking System Non-Performing Assets / Financial Resilience Benchmarks

The Reserve Bank of India's latest financial stability assessment reports that systemic non-performing assets (NPAs) have declined to a multi-decadal low of 1.80%. This improvement in asset quality confirms the strong capital buffers and structural resilience of the domestic banking sector against external macroeconomic shocks. However, the central bank cautioned that potential energy price shocks from global supply chain friction points could increase currency market volatility in the near term. [Economic Times](#)

FY26 Macro Growth Review / GDP Performance Metrics

Official data from the National Statistical Office confirms that the Indian economy maintained solid growth momentum through Financial Year 2026, recording a robust GDP growth rate of 7.70%, beating the government's initial estimate of 7.60%. Economic expansion was supported by a strong 7.80% print in the final quarter, driven by robust domestic consumption and steady manufacturing output. Macro analysts indicate these figures cement the country's position as a resilient outlier among major economies, despite volatile global energy trends. [Bloomberg](#)

Foreign Portfolio Investment Architecture / Unified Market Access Infrastructure

The market regulator, in coordination with premier domestic depositories and clearing houses, has launched the unified 'India Market Access' digital platform effective July 1, 2026. This streamlined infrastructure functions as a centralized onboarding portal designed to lower entry barriers and reduce processing times for offshore fund managers. Institutional analysts expect this administrative upgrade to boost long-term foreign capital flows into domestic equity and debt segments. [RBI](#)

Banking Product Mis-Selling Framework / Consumer Protection Guidelines

The central bank's updated regulatory code targeting product mis-selling across commercial banking channels officially takes effect on July 1, 2026. The revised framework establishes strict consumer protection measures, granting retail banking customers full refunds and formal compensation pathways if financial instruments are inaccurately presented. Corporate compliance experts expect these guidelines to reshape cross-selling practices and fee-income generation models across private and public sector banks. [Economic Times](#)

EPFO System Upgrades / Digital Financial Service Restorations

The Employees' Provident Fund Organisation has completed its scheduled five-day database consolidation and software system migration, restoring full online services effective July 1, 2026. The upgrade temporarily restricted online retirement asset administration and settlement tracking from June 26 through June 30. This system modernization is expected to improve long-term transaction processing speeds and data security across the national pension system. [Economic Times](#)

Aadhaar Digital Authentication Rules / Administrative Fee Waivers

The Unique Identification Authority of India has introduced a temporary fee waiver for updating email addresses linked to Aadhaar identification profiles via its mobile application, effective July 1 through December 31, 2026. The previous ₹75 processing fee has been suspended for a six-month window to encourage better digital contact hygiene and reduce identity verification failures. This policy change is expected to streamline digital KYC pathways for banking and capital market intermediaries. [Economic Times](#)

National Passport Fee Restructuring / Consular Service Changes

The Ministry of External Affairs has implemented a comprehensive upward revision of passport processing and tatkaal application fees effective July 1, 2026, marking the first major structural adjustment since 2012. Standard 36-page documentation processing fees will increase from ₹1,500 to ₹2,500, while accelerated Tatkaal processing rates have been adjusted to ₹5,000. The pricing updates apply across all domestic processing hubs and global consular offices to account for higher operational and technology delivery costs. [Economic Times](#)

Income Tax Filing Timelines / Retail Liquidity Variables

Tax administration authorities have issued reminders to individual taxpayers regarding the July 31, 2026 deadline for filing ITR-1 and ITR-2 forms for the 2025-26 financial year. Missing this deadline will result in financial penalties, limited options for choosing preferential tax regimes, and restrictions on carrying forward

eligible capital losses. Financial advisers expect a seasonal tightening of near-term retail investment liquidity as compliance outflows peak over the month. [Economic Times](#)

Nifty IT Index Derivatives Pricing / Sector Technical Outlook

Derivative positioning for the Nifty IT index highlights a bearish short-term bias following heavy institutional liquidations at the close of June. The underlying index faces near-term technical friction with key resistance parameters establishing at 26,750 against immediate support levels at 25,950. Option chain concentrations indicate traders are hedging against global tech spending uncertainties, making sector-wide stabilization a crucial signal for broader market direction. [Bloomberg](#)

India VIX Volatility Metrics / Near-Term Risk Sentiment

The India VIX volatility benchmark settled lower at 13.48 down 0.96% during recent sessions, indicating a temporary cooling of immediate options pricing risk premiums. Despite persistent geopolitical chatter around major shipping channels like the Strait of Hormuz, the options market is pricing in a relatively stable macro environment. Market analysts suggest this lower volatility base creates a tactical window for systemic index stock accumulation, provided critical structural supports hold. [Economic Times](#)

Pharma Sector Defensive Rotation / Equity Market Flow Diversions

The domestic pharmaceutical index maintained positive divergence, climbing 0.39% to mark consecutive sessions of positive capital inflows against broader index consolidations. This relative outperformance underscores a tactical shift toward defensive allocations as institutional investors de-risk from high-beta tech and banking names. Analysts expect this healthcare sector trend to persist if global macroeconomic crosscurrents increase volatility in cyclical stock groups. [Bloomberg](#)

Automotive Sector Volume Monitoring / Monthly Sales Trends

The Nifty Auto index recorded positive momentum, gaining 0.24% as major manufacturing constituents positioned for the publication of June sales data. Strong closing demand across passenger and commercial vehicle ecosystems provided critical support for the index, balancing weaker trends in technology groups. The upcoming data releases will offer key insights into rural discretionary spending and the health of supply chain inventories heading into the second quarter. [Economic Times](#)

Global Market Spillover Variables / Wall Street Trading Signals

International equity benchmarks registered solid positive closes, with the Dow Jones rising 0.59% to 52,182.74 and the Nasdaq gaining 2.07% to close at 25,820.15. This strong performance provides positive overnight trading cues for Asian markets entering the July session. Domestic market analysts are tracking whether this global momentum can counteract local technology sector distributions and support broader index stabilization. [Bloomberg](#)

Telecom Regulatory Authority Action / Spam Mitigation Protocols

The Telecom Regulatory Authority of India has introduced upgraded features to its 'Do Not Disturb' mobile infrastructure to curb unsolicited commercial communications. The regulatory update allows consumers to report systemic marketing violations in real time, directly impacting unauthorized telecom lead-generation networks. Compliance specialists note this framework enforces stricter data governance rules on financial services and digital marketing providers. [RBI](#)

National Financial Literacy Programs / Onboarding Initiatives

The National Centre for Financial Education has opened registrations for Financial Education Trainers to expand its grassroots financial literacy programs. This systemic campaign targets broadening retail investor awareness across semi-urban and rural areas. Over the long term, wealth managers expect this educational outreach to support steady retail capital flows into mutual funds and capital market instruments. [RBI](#)

Cybersecurity Compliance Standards / CSCR Implementation Timelines

The market regulator published updated clarification guidelines regarding the Cybersecurity and Cyber Resilience Framework (CSCR) for regulated entities. The detailed brief outlines strict timelines for adopting cloud-based architectures while maintaining rigid data isolation protocols. This regulatory mandate forces market intermediaries and brokerage houses to upgrade their technology infrastructure budgets to ensure compliance. [RBI](#)

Mutual Fund Retrieval Tracking / Asset Unlocking Architecture

The regulatory implementation of the 'MITRA' digital retrieval platform has entered its next phase, designed to help investors locate unclaimed mutual fund allocations. This centralized portal simplifies the recovery of dormant assets across asset management firms. Wealth operations expect this transparency initiative to return long-term capital back to active retail investment channels. [Economic Times](#)

Exchange Calendar Continuity / July Trading Session Mapping

Both the National Stock Exchange and Bombay Stock Exchange will operate without any weekday trading holidays throughout July 2026, providing an uninterrupted multi-week trading calendar. All eight scheduled market closures fall on standard weekend blocks, ensuring smooth clearing and settlement cycles for equity and derivative segments. Settling desks note this continuous schedule should support stable institutional volume tracking after holiday disruptions in the prior month. [Economic Times](#)

Securities Market Historical Knowledge Bases / Policy Context Repositories

The operational launch of the 'Dharohar' digital knowledge archive has finalized its core data infrastructure, capturing the structural evolution of the Indian securities market. This repository aggregates key policy transformations, historical market crises, and regulatory interventions for institutional analysis. Policy experts note the resource offers important context for analyzing long-term regulatory trends and capital market structural designs. [RBI](#)

Global Energy Distribution Channels / Strait of Hormuz Risk Assesses

Geopolitical monitor desks continue to track shipping data near the Strait of Hormuz following sudden navigation scares that have kept commodity traders cautious. While crude oil spot prices have maintained stable bands, prolonged security friction could impact global oil supply paths and elevate import bill projections for emerging markets. Indian energy strategists note that sustained stability remains central to keeping domestic corporate fuel input costs in check. [Bloomberg](#)

West Asian Macro Concerns / Export Channel Trade Adjusts

Sustained geopolitical tensions in West Asia continue to introduce uncertainty into global trade projections, complicating forward-looking outlooks for corporate logistics and export sectors. While freight indices have absorbed early route changes, shipping delays present persistent inventory management challenges for manufacturing exporters. Economists expect these trade friction points to influence near-term balance of payments trends and export credit policies. [Bloomberg](#)

Services Sector Structural Contributions / GDP Inflows Validation

Underlying data from the latest macro performance review highlights the services sector as a primary driver of the country's 7.70% GDP growth rate for FY26. Strong growth in financial services, trade, transport, and communication networks offset mixed patches in primary agriculture sectors. This structural shift highlights the country's transformation into a services-driven export economy, supporting institutional allocations to banking and technology infrastructure. [Bloomberg](#)

Manufacturing Capital Formation / Industrial Expansion Indicators

Gross fixed capital formation trends accelerated during the closing quarter of the financial year, matching the broader 7.70% economic expansion rate. Increased public infrastructure spending alongside private capital expenditure in specialized industrial segments supported this structural growth. Fixed income analysts expect this sustained asset creation to maintain steady core credit demand across corporate lending channels.

[Economic Times](#)

Private Consumption Elasticity / Consumer Confidence Variables

Private consumption metrics showed steady recovery trends during recent economic reviews, providing a stable foundation for corporate volume growth projections. Steady urban consumption demand balanced slower growth in rural regions, shaping product launch strategies for consumer durable firms. Macro strategists are tracking whether upcoming monsoon trends will improve rural disposable income and boost mass-market consumer demand. [Economic Times](#)

Monetary Transmission Channels / Interest Rate Structure Continuity

Central bank credit transmission trends indicate commercial lending rates are stabilizing in line with existing policy benchmarks as banks optimize their deposit mixes. Strong systemic loan growth has forced lenders to carefully balance credit-to-deposit ratios to preserve net interest margins. Fixed income desks expect interest rate structures to remain within current ranges until global central banks clarify their policy paths. [RBI](#)

FII Derivative Flow Diversions / Institutional Position Rebalancing

Foreign Institutional Investor (FII) derivative positions showed mixed positioning during recent contract roll-overs, reflecting tactical hedging against global macro variables. Data points show increased index put buying alongside a reduction in single-stock long exposures, signaling short-term caution. Institutional desks expect these position adjustments to keep index movements range-bound until corporate earnings results begin.

[Bloomberg](#)

Corporate Tax Compliance Audits / Enforcement Agency Actions

National tax enforcement authorities have expanded targeted review programs across selected corporate sectors to address legacy indirect tax issues. This stricter oversight underscores a broader government push to ensure steady revenue collections and close compliance loopholes. Corporate legal teams are advising companies to review their accounting provisions to mitigate potential surprise tax liabilities. [Economic Times](#)

Public Sector Capital Expenditure / Infrastructure Funding Allocations

Government spending allocations continued to target high-impact infrastructure projects, supporting economic activity during the early part of the fiscal year. These capital deployments focus on expanding national highway networks, high-speed rail lines, and clean energy distribution systems. Infrastructure analysts expect this steady funding flow to support order book visibility for industrial equipment and capital goods manufacturers. [Bloomberg](#)

Domestic Mutual Fund Inflows / Systematic Investment Stability

Systematic Investment Plan (SIP) configurations maintained steady growth profiles, providing reliable domestic liquidity support against volatile foreign institutional flows. This structural retail participation helps absorb overseas selling pressure and reduces downward pressure on large-cap index stocks. Asset management executives expect these steady inflows to persist, supported by widening digital distribution channels and expanding investor bases. [Economic Times](#)

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