

## Market Commentary

### Overnight global action:

On 11th June 2026, US market delivered a positive performance with S&P500 up by +86.58 pts (1.19%), Dow Jones up by +751.9 pts (1.51%) and Nasdaq up by +634.33 pts (2.23%). Gift Nifty grew by 93.5 pts (0.4%) indicating Indian markets will open positively. Advance-Decline ratio on NSE was 1013:2255 and on BSE was 1279:2928 which showed weakness in the overall markets.

### Index Options Data Analysis:

Sensex max call OI is at 73900 max put OI is at 73800 with PCR of 1.01  
Nifty max call OI is at 23500 max put OI is at 23000 with PCR of 0.92  
Bank Nifty max call OI and put OI both are at 55000 with PCR of 0.97

### Securities in Ban for F&O Trade:

KAYNES

### Sector Performance:

NIFTY AUTO index declined by -0.17% driven by Tube Investments of India Ltd. (-2.8%) and Ashok Leyland Ltd. (-2.84%)

NIFTY FMCG index declined by -0.89% driven by Emami Ltd. (-2.1%) and Godrej Consumer Products Ltd. (-2.13%)

NIFTY REALTY index declined by -0.64% driven by The Phoenix Mills Ltd. (-1.9%) and Sobha Ltd. (-1.86%)

NIFTY OIL & GAS index declined by -0.22% driven by Chennai Petroleum Corporation Ltd. (-3.7%) and Hindustan Petroleum Corporation Ltd. (-

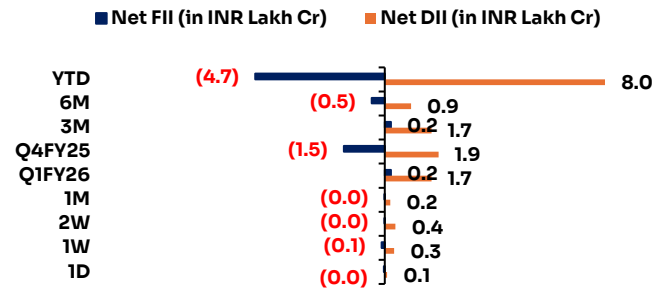
NIFTY CHEMICALS Index grew by 0.69% driven by Himadri Speciality Chemical Ltd. (+6.7%) and Coromandel International Ltd. (+1.92%)

NIFTY PSU BANK index declined by -0.89% driven by Indian Overseas Bank (-2.5%) and UCO Bank (-2.53%)

Now listen to the daily market update



Fund Flow	Buy	Sell	Net
FII/FPI	14,001	15,988	-1,987
DII	16,823	12,598	4,225



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,294	0.4%	-11.4%	21.1
Sensex 30	73,833	-0.2%	-13.4%	19.3
Nifty 50	23,162	-0.2%	-11.4%	21.0
India VIX	16	-0.2%	64.6%	
Nifty Bank	55,177	0.1%	-7.4%	16.2
Nifty Next 50	68,379	-1.1%	-1.4%	68.4
Nifty 500	22,114	-0.5%	-7.4%	20.8
Nifty Mid 100	59,325	-0.8%	-1.9%	30.5
Nifty Small 250	16,643	-0.8%	-0.3%	28.0
USD/INR	95	0.0%	6.1%	
India 10Y	6.9%			
India 2Y	6.3%			
India 1Y	5.9%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,354	1.2%	7.4%	31.8
Dow Jones	50,671	1.5%	5.4%	24.5
Nasdaq 100	29,142	2.2%	15.4%	47.9
FTSE 100	10,304	0.5%	3.8%	16.3
CAC 40	8,201	0.5%	0.6%	24.0
DAX	24,210	0.1%	-1.2%	25.2
Nikkei 225	64,217	0.1%	27.6%	34.3
Hang Seng	24,249	-0.7%	-5.4%	11.8
Shanghai Cor	3,987	-0.2%	0.5%	18.0
KOSPI	7,764	0.4%	84.2%	38.4
S&P/ASX 200	8,633	-0.2%	-0.9%	22.8

## Stocks in the News

### ADANI PORTS AND SEZ LTD. (CMP: 1454, MARKET CAP: 239516 Cr., SECTOR: POWER GENERATION/DISTRIBUTION)

The company announced an institutional operational expansion project alongside its upcoming final dividend adjustment of Rs 7.50 per share on June 12, 2026. The stock closed around Rs 1,786.60 ahead of the ex-date, reflecting consolidation. Analysts view the long-term fundamentals as robust given high double-digit cargo volume growth expectations and increasing port capacities.

[Economic Times](#)

### TRENT LTD. (CMP: 2712, MARKET CAP: 144602 Cr., SECTOR: RETAILING)

Trent is set to turn ex-dividend on June 12, 2026, for its final dividend of Rs 6 per share. The stock has been trading near its key psychological resistance lines, closing at Rs 2,707.20. Robust consumer demand trends across Westside and Zudio brands continue to drive strong revenue momentum, cementing positive multi-year technical configurations. [Bloomberg](#)

### TATA STEEL LTD. (CMP: 198, MARKET CAP: 247172 Cr., SECTOR: STEEL & IRON PRODUCTS)

Tata Steel turning ex-dividend on June 12, 2026, for its Rs 4 final dividend will result in a corresponding share price adjustment from its current base of Rs 197.93. The European operations restructuring and local capital expenditures remain central to its medium-term financial outlook. Volume trends continue to exhibit localized demand stability within infrastructure sectors. [Economic Times](#)

### TATA MOTORS LTD. (CMP: 358, MARKET CAP: 131980 Cr., SECTOR: AUTOMOBILES-TRUCKS/LCV)

The company's domestic entity trades ex-dividend today for its declared final payout of Rs 4 per share from a prior price of Rs 375.85. The company's commercial and passenger vehicle divisions continue to benefit from broad structural tailwinds. Order pipelines remain solid across high-margin premium variations and electrification architectures. [Groww](#)

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	25,790	-0.2%	-8.5%	21.2
Nifty IT	27,821	-1.6%	-26.6%	21.7
Nifty Fin Ser	25,152	-0.2%	-8.9%	16.4
Nifty Pharma	24,307	0.6%	7.0%	40.0
Nifty Services	29,422	-0.2%	-12.6%	32.4
Nifty Cons Du	34,169	-1.2%	-7.0%	46.3
Nifty PSE	9,783	-1.0%	-0.7%	10.3
Nifty FMCG	48,522	-0.9%	-12.5%	33.4
Nifty Pvt Bank	26,886	0.6%	-6.4%	10.0
Nifty PSU Banl	8,304	-0.9%	-2.7%	13.6
Nifty Cons	11,048	-0.5%	-10.1%	39.0
Nifty Realty	743	-0.6%	-15.3%	32.3
Nifty Infra	9,025	-0.4%	-6.2%	20.9
Nifty Energy	38,656	-0.8%	9.4%	12.3
Nifty Health	15,501	0.3%	5.9%	37.1
Nifty India Mfg	15,420	-0.4%	0.1%	28.7
Nifty Metal	12,734	-0.3%	14.0%	22.8
Nifty Oil & Gas	10,779	-0.2%	-11.9%	16.5

## Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
<b>Long</b>		
MPHASIS	5.8	3.9
TECHM	2.3	1.3
ALKEM	1.7	0.6
TATACONSUM	5.8	2.0
NAUKRI	1.0	0.7
<b>Short</b>		
NAM-INDIA	14.0	-5.9
GVT&D	8.9	-6.6
LTF	7.6	-3.3
MUTHOOTFIN	6.2	-6.1
DIVISLAB	5.7	-1.6
<b>Long Unwinding</b>		
PATANJAL	-7.4	-0.4
HDFCAMC	-5.7	-1.9
TIINDIA	-4.8	-2.8
PNBHOUSING	-3.7	-3.3
JSWENERGY	-3.7	-1.5
<b>Short Covering</b>		
SUNPHARMA	-5.7	0.0
POWERGRID	-2.6	1.2
GAIL	-2.4	0.2
POWERINDIA	-1.4	0.7

**ATHER ENERGY LTD. (CMP: 1028, MARKET CAP: 39379 Cr., SECTOR: AUTOMOBILE TWO & THREE WHEELERS)**

Ather Energy's board will formally convene on June 12, 2026, to finalize a massive capital raising blueprint encompassing equity, non-convertible debentures (NCDs), and foreign currency convertible bonds (FCCBs). The stock reacted positively ahead of the event, closing at Rs 1,013.15. Funds are earmarked for aggressive production capacity ramp-ups and charging network expansion. [Angel One](#)

Commodity:	CMP	1D	YTD
Gold (\$)	4,171	0.9%	0.3%
Silver (\$)	66.3	2.3%	0.1%
Brent Oil (\$)	89.8	-3.5%	-0.2%
WTI Oil (\$)	86.9	-3.5%	-20.6%

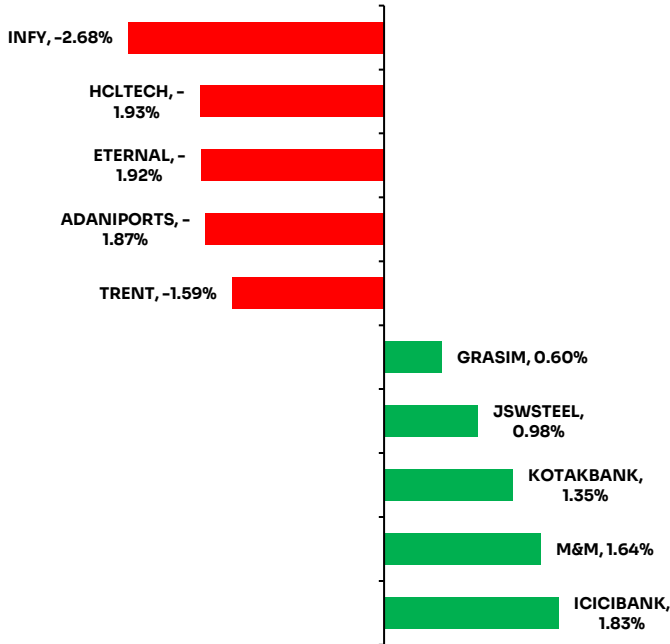
Currency	CMP	1D	YTD
USD/INR	95.8	0.5%	0.0%
EUR/INR	110.6	0.6%	0.1%
GBP/INR	128.2	0.7%	0.1%
JPY/INR	0.6	0.8%	0.1%
EUR/USD	1.2	0.1%	0.1%

**Securities Lending & Borrowing Scheme (SLBS)**

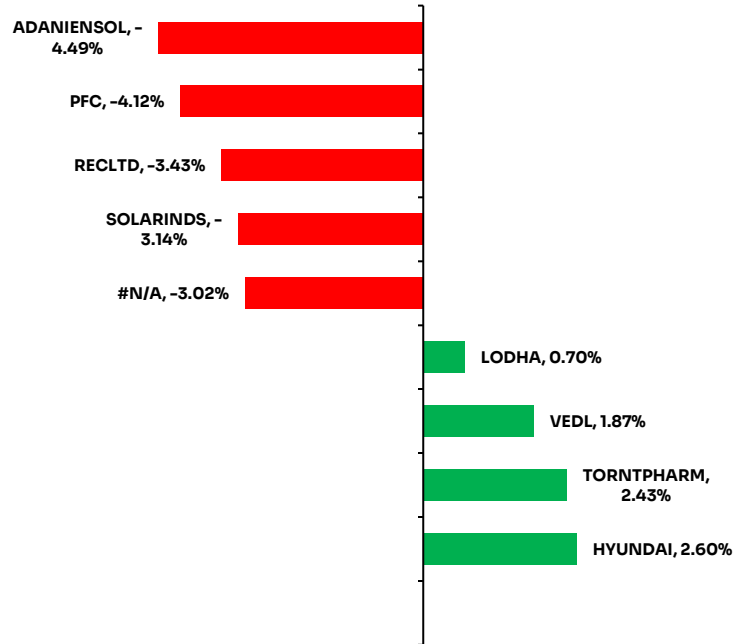
Company	Under.Ltp	Fut.Ltp	Spread (%)
KAYNES	3,075.5	2,962.0	3.7
IREDA	120.5	117.2	2.7
TATASTEEL	198.8	195.5	1.6
BDL	1,185.5	1,167.0	1.6

## Top Gainers and Losers

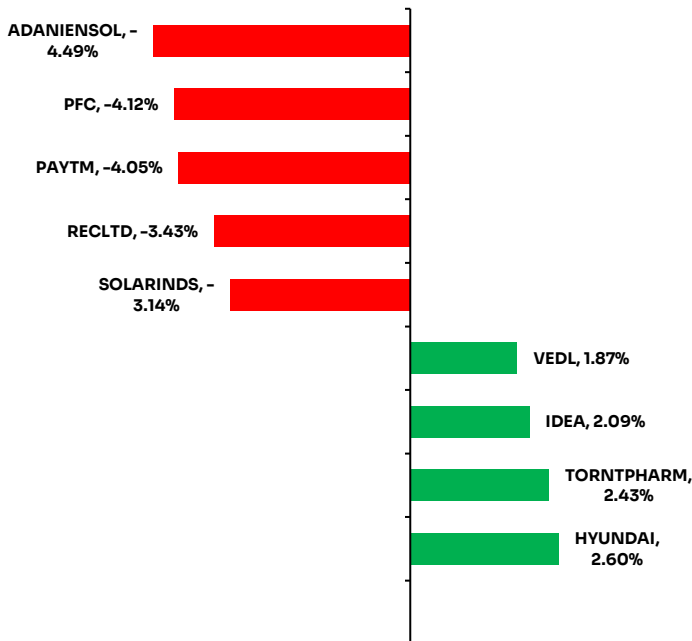
Nifty 50 index



Nifty Next 50 index



Nifty 200 index



## 52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
ASTERDM	815	825	825	10-Jun-26
SYRMA	1,249	1,291	1,268	10-Jun-26
HONASA	416	438	425	29-May-26
AKUMS	608	621	597	27-Jun-25
NEPHROPLUS	759	760	742	10-Jun-26

## 52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
HCLTECH	1,114	1,090	1,103	14-May-26
HDFCLIFE	545	543	548	10-Jun-26
BHARTIHEXA	1,477	1,434	1,439	2-Apr-26
ICICIPRULI	461	460	465	10-Jun-26
BALKRISIND	1,976	1,970	2,015	24-Mar-26

## Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
LENSKART	46,659	4,871	5,038	502
ABSLIOBANK	371	63	42	161
UNIECOM	38,212	6,530	4,002	90
PPAP	1,470	252	155	247
UNIONGOLD	706	123	75	141
OMAXE	5,234	922	583	75
INDOCO	10,972	1,948	1,271	246
GSLSU	1,012	192	459	48
MOTISONS	116,206	22,294	15,622	13
URAVIDEF	214	41	28	113
BANK1OADD	10,389	2,030	1,230	17
UNICHEMLAB	24,850	4,877	2,942	447
AEGISLOG	40,729	7,996	5,783	942
APCL	59	12	10	104
MEGASTAR	378	76	58	302
EPACKPEB	27,029	5,529	4,823	232
HISARMETAL	14	3	2	156
CAPILLARY	300	63	45	498
GRADIENTE	3,293	703	459	2
SAMPANN	484	104	87	27
AMANTA	6,014	1,301	862	149
RPGLIFE	125	28	19	2,193
IVZINGOLD	274	61	43	126
SUPREMEINF	964	215	146	81

## Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
AGIIL	Arihant Capital Markets Limited	BUY	752	371.8
AGIIL	Arihant Capital Markets Limited	SELL	781	372.9
AMANTA	Alphagrep Securities Private Limited	BUY	219	156.6
AMANTA	Alphagrep Securities Private Limited	SELL	219	156.4
AMANTA	Blitzquant Research Llp	BUY	206	158.9
AMANTA	Nk Securities Research Private Limited	BUY	381	156.1
AMANTA	Nk Securities Research Private Limited	SELL	381	156.2
AMANTA	Silverleaf Capital Services Private Limited	BUY	262	159.0
AMANTA	Silverleaf Capital Services Private Limited	SELL	262	158.9
ATALREAL	Acme Capital Market Limited	BUY	1908	30.6
ATALREAL	Acme Capital Market Limited	SELL	1908	29.1
ATALREAL	Altizen Ventures Llp	SELL	1450	29.7
ATALREAL	Altizen Ventures Llp	BUY	1671	30.1
ATALREAL	Hill Top Impex Pvt Ltd .	BUY	100	29.0
ATALREAL	Hill Top Impex Pvt Ltd .	SELL	750	30.6
ATALREAL	Hrti Private Limited	BUY	668	29.8
ATALREAL	Hrti Private Limited	SELL	885	29.9
ATALREAL	Seema Jain	BUY	100	29.0
ATALREAL	Seema Jain	SELL	750	30.8
AVG	L7 Hitech Private Limited	BUY	21	174.7
AVG	L7 Hitech Private Limited	SELL	97	155.4
BANG	Nishant Pitti	SELL	74	33.3
BIOFILCHEM	Irage Broking Services Llp	SELL	9	36.7
BIOFILCHEM	Irage Broking Services Llp	BUY	156	36.4
BIOFILCHEM	Orion Stocks Ltd	BUY	58	37.2
BIOFILCHEM	Orion Stocks Ltd	SELL	210	36.5
BMLL	Dixit Jitendra Bokadia	BUY	75	118.7
BMLL	Jayant Babulal Bokadia	BUY	100	118.7
BMLL	Narola Kailasben Prakashbhai	SELL	85	118.6
BMLL	Oswal Energies Limited	BUY	100	118.7
BMLL	Rathod Manoj Chhaganlal Huf	BUY	127	119.4
BMLL	Rathod Manoj Chhaganlal Huf	SELL	240	118.7
DURLAX	Equirise Finance And Consultancy	BUY	158	48.4
DURLAX	R G Family Trust	SELL	220	48.5
DURLAX	Raavi Enterprise	SELL	210	48.4
EBGNG	Edelweiss Mutual Fund	BUY	641	390.0
EBGNG	Goldman Sachs Funds-Goldman Sachs Asia Equity Portfo	BUY	641	390.0
EBGNG	Iti Mutual Fund	BUY	641	390.0
EBGNG	Mirae Asset Mutual Fund	BUY	641	390.0
EBGNG	Motilal Oswal Equity Opportunities Fund Series li	BUY	641	390.0
EBGNG	Trust Mutual Fund	BUY	641	390.0
EBGNG	Vidhi S Khandelwal	SELL	4487	390.0
EPACKPEB	Alphagrep Securities Private Limited	BUY	564	226.8
EPACKPEB	Alphagrep Securities Private Limited	SELL	564	226.9

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
EPACKPEB	Blitzquant Research Llp	SELL	587	228.4
EPACKPEB	Blitzquant Research Llp	BUY	587	228.3
EPACKPEB	Hrti Private Limited	SELL	557	226.9
EPACKPEB	Hrti Private Limited	BUY	564	226.7
EPACKPEB	Junomoneta Finsol Private Limited	SELL	951	227.1
EPACKPEB	Junomoneta Finsol Private Limited	BUY	960	227.1
EPACKPEB	Microcurves Trading Private Limited	BUY	921	228.4
EPACKPEB	Microcurves Trading Private Limited	SELL	921	228.6
EPACKPEB	Nk Securities Research Private Limited	SELL	1005	227.8
EPACKPEB	Nk Securities Research Private Limited	BUY	1005	227.6
EPACKPEB	Qe Securities Llp	SELL	797	227.0
EPACKPEB	Qe Securities Llp	BUY	808	227.6
GCSL	L7 Securities Private Limited	BUY	160	417.2
GCSL	Mansukh Securities & Finance Limited	BUY	130	419.3
GCSL	Mansukh Securities & Finance Limited	SELL	216	416.6
GENESYS	Hrti Private Limited	BUY	299	329.2
GENESYS	Hrti Private Limited	SELL	306	330.8
GENESYS	Junomoneta Finsol Private Limited	BUY	435	330.4
GENESYS	Junomoneta Finsol Private Limited	SELL	436	330.6
GENESYS	Qe Securities Llp	SELL	276	331.5
GENESYS	Qe Securities Llp	BUY	286	330.2
GJL	Finvesta First	SELL	115	134.5
GOCOLORS	Ramdoot Realtors Pvt Ltd	BUY	481	356.4
GOCOLORS	Ramdoot Realtors Pvt Ltd	SELL	481	354.5
GRMOVER	Algoquant Fintech Limited	SELL	1262	86.9
GRMOVER	Algoquant Fintech Limited	BUY	1705	84.9
GRMOVER	Hrti Private Limited	BUY	699	84.9
GRMOVER	Hrti Private Limited	SELL	1522	84.7
GRMOVER	R G Family Trust	SELL	341	82.4
GRMOVER	R G Family Trust	BUY	1255	86.0
IEML	Niraj Umesh Joshi	SELL	101	43.3
INDOCO	Nk Securities Research Private Limited	BUY	564	234.7
INDOCO	Nk Securities Research Private Limited	SELL	564	234.9
KSHITIJPOL	Bhavishya Ecommerce Private Limited	SELL	1169	7.2
KSHITIJPOL	Bhavishya Ecommerce Private Limited	BUY	1443	7.2
KSHITIJPOL	Deepak Kulthia	SELL	1800	7.2
KSHITIJPOL	Gagan Karel	SELL	1500	7.2
KSHITIJPOL	Lalita Devi Naita	SELL	1593	7.2
KSHITIJPOL	Paritosh Electricals Private Limited	SELL	1275	7.2
KSHITIJPOL	Sandeep Kulthia	SELL	1100	7.2
KSHITIJPOL	Suman Naita	SELL	1400	7.2
LEMERITE	Laxmi Trade Solutions	SELL	369	25.4
LEMERITE	Laxmi Trade Solutions	BUY	844	24.2
LEMERITE	Neo Apex Share Broking Services Llp	SELL	913	24.0
LENSKART	Platinum Jasmine A 2018 Trust	SELL	40000	490.0
MEGASTAR	Anubhuti Value Fund 2	SELL	75	312.3
MEGASTAR	Shanti Spintex Limited	BUY	100	319.2

## Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
GNG Electronics Limited	ITI MUTUAL FUND	BUY	6,41,029	390.0
GNG Electronics Limited	MCP EMERGING MARKETS FUND LP	BUY	1,45,662	390.0
GNG Electronics Limited	MIRAE ASSET MUTUAL FUND	BUY	6,41,032	390.0
GNG Electronics Limited	MOBIUS INVESTMENT TRUST PLC	BUY	4,95,364	390.0
GNG Electronics Limited	MOTILAL OSWAL EQUITY OPPORTUNITIES FUND SERIES I	BUY	6,41,027	390.0
GNG Electronics Limited	TRUST MUTUAL FUND	BUY	6,41,030	390.0
GNG Electronics Limited	VIDHI S KHANDELWAL	SELL	44,87,203	390.0
Lenskart Solutions Ltd	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	10,20,409	490.0
Lenskart Solutions Ltd	ALPHA ALTERNATIVES EQUITY ABSOLUTE RETURN FUND	BUY	5,10,205	490.0
Lenskart Solutions Ltd	CANARA ROBECO MUTUAL FUND	BUY	32,24,491	490.0
Lenskart Solutions Ltd	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE LIMITED	BUY	6,12,245	490.0
Lenskart Solutions Ltd	FRANKLIN TEMPLETON MUTUAL FUND	BUY	22,44,898	490.0
Lenskart Solutions Ltd	GHISALLO MASTER FUND LP	BUY	8,16,327	490.0
Lenskart Solutions Ltd	GOLDMAN SACHS INVESTMENTS MAURITIUS LIMITED	BUY	11,22,450	490.0
Lenskart Solutions Ltd	ICICI PRUDENTIAL LIFE INSURANCE COMPANY LIMITED	BUY	20,40,817	490.0
Lenskart Solutions Ltd	ICICI PRUDENTIAL MUTUAL FUND	BUY	12,24,490	490.0
Lenskart Solutions Ltd	INTEGRATED CORE STRATEGIES (ASIA) PTE LTD	BUY	13,26,531	490.0
Lenskart Solutions Ltd	KOTAK FUNDS-INDIA MIDCAP FUND	BUY	7,14,286	490.0
Lenskart Solutions Ltd	KOTAK MAHINDRA LIFE INSURANCE COMPANY LIMITED	BUY	10,20,409	490.0
Lenskart Solutions Ltd	KOTAK MAHINDRA MUTUAL FUND	BUY	1,20,61,211	490.0
Lenskart Solutions Ltd	MIRAE ASSET MUTUAL FUND	BUY	22,04,083	490.0
Lenskart Solutions Ltd	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	5,10,205	490.0
Lenskart Solutions Ltd	NATIONAL PENSION SYSTEM (NPS) TRUST	BUY	20,00,000	490.0
Lenskart Solutions Ltd	NATIONAL PENSION SYSTEM (NPS) TRUST	BUY	30,61,225	490.0
Lenskart Solutions Ltd	PLATINUM JASMINE A 2018 TRUST	SELL	4,00,00,000	490.0
Lenskart Solutions Ltd	SBI MUTUAL FUND	BUY	9,18,368	490.0
Lenskart Solutions Ltd	SOCIETE GENERALE	BUY	10,20,410	490.0
Lenskart Solutions Ltd	VIRIDIAN ASIA OPPORTUNITIES MASTER FUND	BUY	13,26,531	490.0

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

<b>Company</b>	<b>Purpose</b>
Ather Energy Limited	Fund Raising
Ducon Infratechnologies Limited	Fund Raising
Mukka Proteins Limited	Fund Raising/Other business matters
Omkar Speciality Chemicals Limited	Financial Result
Soma Textiles & Industries Limited	Dividend

## Nifty & Bank Spot – Pivot Levels 12/06/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
<b>Nifty</b>	<b>23161.60</b>	<b>23046</b>	<b>22931</b>	<b>22791</b>	<b>23302</b>	<b>23442</b>	<b>23557</b>
<b>Bank Nifty</b>	<b>55176.75</b>	<b>54752</b>	<b>54329</b>	<b>53905</b>	<b>55599</b>	<b>56023</b>	<b>56446</b>

## Kamdhenu Ltd – Technical Stock Call – 12/06/2026

Technical Stock Call	Action	Reco	Target	Support	SL
<b>KAMDHENU</b>	<b>BUY</b>	28.25	52	(24.80-19.40)	16



### View – Medium Term Bullish

The primary move in the stock commenced from 25.10 (APR 25). Stock trading above the averages & further reached a high of 35.95 (JUN 25), breaching 200 SMA.

Forming Lower tops, the stock started trading below averages & reached a low of 16.15 (MAR 26).

Buying emerged & the stock commenced its up move reaching a high of 27.40 (MAY 26), but faced resistance in that area & witnessed a minor correction. However, the stock traded into a narrow downward channel during the period APR 25\_JUN 26.

Recently, after forming higher at 22.87 (JUN 26), the stock has given a **Descending Channel Breakout** supported by volume with a Bullish candle reaching to a high of 28.40 (JUN 26), which is higher than the previous swing highs.

**MACD, Aroon & TSI indicators suggest Positive crossover.**

Target of **52** is expected with lower support levels at **(24.80-19.40)** in case of intermediate fall. A stop loss at **16** is to be followed for the trade.

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

Global Macro Events (12th June 2026)		
Event	Previous	Forecasted
<b>India</b>		
Inflation Rate YoY MAY	0.0348	0.039
Inflation Rate MoM MAY	0.0027	0.007
Bank Loan Growth YoY MAY/29	0.162	
Deposit Growth YoY MAY/29	0.122	
Foreign Exchange Reserves JUN/05	\$682.32B	
<b>USA</b>		
Fed Balance Sheet JUN/10	\$6.711T	
Michigan Consumer Sentiment Prel JUN	44.8	46
Michigan 5 Year Inflation Expectations Prel JUN	0.039	0.038
Michigan Consumer Expectations Prel JUN	44.1	45
Michigan Current Conditions Prel JUN	45.8	45.9
Michigan Inflation Expectations Prel JUN	0.048	0.048
Baker Hughes Oil Rig Count JUN/12	431	
Baker Hughes Total Rigs Count JUN/12	563	
<b>China</b>		
New Yuan Loans MAY	CNY-10B	CNY 500.0B
M2 Money Supply YoY MAY	0.086	0.087
Outstanding Loan Growth YoY MAY	0.056	0.055
Total Social Financing MAY		
<b>Great Britain</b>		
GDP MoM APR	0.003	0.001
GDP 3-Month Avg APR	0.006	0.008
Goods Trade Balance APR	£-27.22B	£-20.5B
Goods Trade Balance Non-EU APR	£-15.195B	£-9.8B
Industrial Production MoM APR	-0.002	0.003
Manufacturing Production MoM APR	0.012	-0.002
Balance of Trade APR	£-9.658B	£-4.1B
Construction Output YoY APR	-0.003	-0.009
GDP YoY APR	0.012	0.011
Industrial Production YoY APR	0	-0.002
Manufacturing Production YoY APR	0.012	0.003
NIESR Monthly GDP Tracker MAY	0.008	0.007
<b>Germany</b>		
Harmonised Inflation Rate MoM Final MAY	0.01	-0.001
Harmonised Inflation Rate YoY Final MAY	0.03	0.027
Inflation Rate MoM Final MAY	0.01	-0.002
Inflation Rate YoY Final MAY	0.03	0.026
Bundesbank President Nagel Speech		

## ##STOCK SPECIFIC NEWS

**ACC Ltd** ACC trades ex-dividend on June 12, 2026, distributing Rs 7.50 per share to its eligible registered shareholders. The cement major continues to exhibit operational efficiencies following comprehensive cost-optimization drives post-consolidation. Regional pricing matrices remain a key trigger for immediate EBITDA-per-tonne improvements. [BSE India](#)

**Ambuja Cements Ltd** Ambuja Cements turns ex-dividend on June 12, 2026, for a final dividend payout of Rs 2 per equity share. The stock faces structural tailwinds driven by ambitious organic volume capacities aimed at hitting 140 MTPA. Technical indicators signal steady volume-backed consolidation above standard moving averages. [NSE India](#)

**Adani Enterprises Ltd** The flagship incubator company trades ex-dividend today for its final dividend allocation of Rs 1.30 per share. Operating revenues exceed Rs 1 lakh crore with net profits tracking above Rs 7,000 crore on a trailing basis. The stock performance continues to be driven by milestones across green hydrogen and airport commercial infrastructure. [Groww](#)

**Canara Bank** Canara Bank executes its final corporate dividend payout of Rs 4.20 per equity share today. The public sector lender shows improved net interest margins (NIMs) and systematic reduction in overall gross non-performing asset (GNPA) percentages. Credit growth continues to outpace long-term industry averages within mid-corporate segments. [BSE India](#)

**Punjab National Bank** Punjab National Bank turns ex-dividend on June 12, 2026, with a final dividend distribution of Rs 3 per share. Systemic retail and agricultural credit originations have expanded significantly on a YoY scale. Technical support zones are robust near recent breakout layers amid heavy institutional volume inflows. [NSE India](#)

**Voltas Ltd** Voltas turns ex-dividend today for its Rs 4 per share final dividend distribution. Unprecedented seasonal summer volumes across rooms and commercial cooling architectures have structurally repositioned short-term earnings expectations. Profitability margins are being closely monitored amid escalating raw material components. [Economic Times](#)

**Navin Fluorine International Ltd** The specialty chemical manufacturer trades ex-dividend today for a declared final dividend of Rs 8.60 per share. High-value contract pipelines in the agrochemical and CDMO spaces remain primary revenue levers for upcoming operational cycles. Technical configurations show long-term structural accumulation patterns. [BSE India](#)

**City Union Bank Ltd** The private lender has announced a strategic bonus issue configuration in the ratio of 1:3 turning active on June 12, 2026. This layout aims to enhance capital liquidity and expand the overall retail shareholding architecture. Asset quality indices remain within predictable guidelines following recovery operations. [BSE India](#)

**Elecon Engineering Company Ltd** Elecon Engineering processes its final dividend payment of Rs 1.50 per share today. Strong demand metrics across the material handling equipment and specialized gear segments drive structural revenue execution. Industrial order books indicate execution visibility over the next fiscal window. [Groww](#)

**Petronet LNG Ltd** Petronet LNG turns ex-dividend today for its final dividend of Rs 3 per share. Long-term volume offtake agreements remain insulated against massive short-term spot gas volatility trends. Technical charts highlight critical support holding firmly at lower channel configurations. [BSE India](#)

**DCB Bank Ltd** DCB Bank processes its final corporate dividend payout of Rs 1.45 per equity share today. Steady execution across home loans and co-lending avenues with non-banking financial companies forms the core growth trajectory. Credit costs continue to drop, stabilizing return on asset (RoA) targets. [BSE India](#)

**Lloyds Metals and Energy Ltd** The mining and iron ore major trades ex-dividend today for its final dividend of Rs 1 per share. Strong domestic iron ore volumes and operational scale enhancements at captive processing units support financial health. Earnings visibility remains anchored to capital expenditures for expanding DRI capacities. [BSE India](#)

**MM Forgings Ltd** MM Forgings processes its interim corporate dividend payout of Rs 4 per equity share today. Continued automotive export demand stabilization and rising domestic commercial vehicle volumes bolster overall order utilization. Operational margins are supported by long-term raw material pass-through agreements. [BSE India](#)

**Adani Total Gas Ltd** The city gas distribution player turns ex-dividend today for a declared dividend of Rs 0.25 per share. Structural expansion of CNG stations and PNG network penetration across allotted geographical areas remain fundamental drivers. Volume trends show steady expansion amid competitive alternative fuel pricing metrics. [BSE India](#)

**Piramal Finance Ltd** Piramal Finance turns ex-dividend today for its substantial final dividend allocation of Rs 11 per equity share. The non-banking financial company continues to prioritize retail loan book diversification across tier-2 and tier-3 geographic zones. Asset yields remain strong despite shifting domestic cost-of-capital frameworks. [BSE India](#)

## SECTION 2: CORPORATE ANNOUNCEMENTS

**Ather Energy Ltd / Fundraising Board Outcome** The Board of Directors approved a fund-raising framework up to unspecified tranches via public issue, preferential allocation, or QIP routes involving equity shares and convertible instruments to secure long-term capital structures. [Official Filing](#)

**City Union Bank Ltd / Share Capital Adjustment via Bonus Issue** The exchange disclosure confirms completion of the 1:3 bonus issue allotment criteria, expanding the underlying base capital structure to reward long-term retail stakeholders. [Official Filing](#)

**iStreet Network Ltd / Preferred Share Warrant Conversions** The corporate cell reported official trading approvals from exchanges for 1,833,334 equity shares allotted to non-promoters after the conversion of preferential warrants. [Official Filing](#)

**Mobavenue AI Tech Ltd / Share Split Execution Details** The company finalized the record verification processes for sub-dividing its existing equity shares from a face value of Rs 10 down to Rs 2 to enhance public liquidity. [Official Filing](#)

**Sumeet Industries Ltd / Rights Issue Document Allotment** The executive board submitted final structural letters to exchanges regarding the pricing framework and chronological subscription dates for its upcoming rights issue. [Official Filing](#)

**Gujarat State Fertilizers & Chemicals Limited / Secretarial Compliance Review** The management dispatched supplementary clarifications regarding key managerial changes and structural oversight reports requested by regulatory bodies under SEBI LODR rules. [Official Filing](#)

**RACL Geartech / Institutional Asset Adjustments** The operational desk submitted structural disclosure updates touching upon domestic capital allocations and structural plant modifications designed to mitigate supply chain disruptions. [Official Filing](#)

**SECTION 3: MACRO / NON-STOCK NEWS**

**Gift Nifty Derivative Positioning Indicate Stable Momentum** Early derivative contracts on the Gift Nifty index signal a flat-to-positive opening bias for the benchmark Nifty 50. Options open interest concentrates heavily around nearby monthly call and put strikes, showing an immediate trading range setup. Low localized implied volatility indices prevent aggressive immediate directional breakouts. [5paisa](#)

**FII Capital Outflows Offset by Persistent Institutional Buying** Foreign Institutional Investors (FIIs) print net cash outflows of Rs 2,125 crore in recent data cycles, compounding multi-week structural distribution patterns. Domestic Institutional Investors (DIIs) systematically absorb this selling pressure by injecting a net Rs 3,124 crore into equity segments. This institutional balance prevents index breakdowns below crucial exponential moving support lines. [5paisa](#)

**Global Market Clues Impact Local Sentiment via US Corrections** Wall Street indices closed lower, with the Dow Jones dropping 1.85% to 49,941.20 and the Nasdaq sliding 1.98% to 25,188.12. This soft global backdrop creates an atmospheric headwind for high-beta Indian sectors like information technology and banking. Traders are keeping a close watch on cross-border asset reallocations ahead of major global policy updates. [5paisa](#)

**European Indices Lend Fragmented Support to Emerging Markets** Major European equity indexes, including the STOXX 50 up 0.77% and the FTSE 100 expanding 0.73%, provided late-stage relief to risk assets. This regional stability helps curb steep overnight markdowns in emerging market funds. Global fund managers continue to rotate tactical capital into domestic manufacturing economies. [Bloomberg](#)

**Monsoon Advancement Dynamics Reshape Rural Demand Horizons** The Indian meteorological networks indicate steady structural progress of the southwest monsoon across central agrarian belts. This timely distribution is critical for kharif planting timetables and managing core food inflation expectations. Economists project this phase could revitalize underlying rural consumption patterns for consumer durables. [Economic Times](#)

**RBI Liquidity Interventions Neutralize Short-Term Banking Gaps** The Reserve Bank of India utilized localized variable rate repo auctions to inject necessary operational liquidity into the interbank banking system. Weighted average call money rates remain tightly aligned with the benchmark repo band, stabilizing near-term treasury portfolios. Bank credit growth continues to hover within predictable mid-teen bands nationwide. [RBI](#)

**Bond Yield Trajectories Flatten Amid Global Tightening Concerns** The benchmark Indian 10-year government bond yield consolidated near crucial percentage support levels as global yields adjusted upward. Institutional market participants are matching local sovereign debt exposures ahead of scheduled primary market debt auctions. Local inflation tracking keeps real yields attractive to long-term foreign portfolio accounts. [Bloomberg](#)

**Crude Oil Market Volatility Tests Corporate Input Cost Margins** Brent crude futures adjusted inside tight global horizontal ranges as macroeconomic growth signals conflicted with supply discipline measures. For Indian macro dynamics, stable crude prices near standard baseline assumptions support oil marketing margin outlooks. Specialty chemical and paint sectors remain highly sensitive to underlying crude derivative fluctuations. [Economic Times](#)

**GST Inflow Registrations Demonstrate Enduring Domestic Consumption** Recent systemic indirect tax collection readouts show resilient domestic transaction run-rates across major manufacturing states. Compliance improvements and robust services sector growth continue to underpin steady internal revenue streams. Financial analysts indicate this structural fiscal buffer provides the government with flexible capital expenditure space. [Economic Times](#)

**Manufacturing PMI Print Highlights Sustained Capacity Utilization** The seasonally adjusted purchasing managers index points to an ongoing expansion phase across primary industrial sectors. New domestic export orders and strong capital goods acquisition trends maintain high long-term manufacturing output levels. Corporate capital expenditure plans are backed by strong domestic demand and healthy corporate balance sheets. [Bloomberg](#)

**Services Sector Growth Momentum Outpaces Long-Term Baselines** High-frequency services industry indicators show strong growth driven by digital transformations and expanding corporate logistics. Employment generation indices within urban centers remain positive, supporting broad discretionary consumer spending trends. Input cost inflation pressures are mostly being offset by steady productivity gains. [Economic Times](#)

**Currency Market Dynamics See Rupee Stabilizing Near Historical Bands** The Indian Rupee traded within narrow horizontal ranges against the US Dollar, supported by active central bank intervention strategies. Robust foreign exchange reserves provide a cushion against speculative capital outflows during global macro shifts. Export competitiveness is stable compared to regional emerging market peers. [RBI](#)

**Corporate Bond Market Yield Spreads Mirror Quality Reallocations** Yield spreads between high-grade corporate debt papers and sovereign benchmarks have narrowed, reflecting solid balance sheet configurations. Credit rating upgrades outpace downgrades across capital-intensive infrastructure and power distribution entities. Commercial paper issuances help fund short-term working capital requirements efficiently. [Bloomberg](#)

**Steel and Metal Consumption Cues point to Infrastructure Push** Domestic consumption of finished steel and metal alloys continues to expand, driven by state-led logistics and railway network upgrades. Base metal price trends on the London Metal Exchange are affecting local inventory valuations for domestic primary producers. Operational margins remain linked to the sourcing security of raw materials like coking coal. [Economic Times](#)

**Automotive Retail Registration Data Signals Evolving Category Mix** Total vehicle retail registrations show varied trends, with passenger vehicles outperforming entry-level two-wheeler segments. Premiumization trends continue to drive average selling prices higher across major manufacturing groups. Electric vehicle penetration rates are rising steadily within urban micro-markets. [Economic Times](#)

**Real Estate Inventory Lifecycles Reflect Urban Premium Absorption** Residential sales data across top metropolitan regions show steady absorption rates for premium and luxury housing units. Commercial office leasing remains supported by Global Capability Centers (GCCs) expanding their footprints in India. Financing costs for developers are steady, backed by institutional private equity partnerships. [Bloomberg](#)

**Digital Payments Infrastructure Reaches New Daily Transaction Peaks** The Unified Payments Interface (UPI) recorded higher transaction volumes, demonstrating deep structural penetration into semi-urban economies. This digital shift supports formal retail credit expansion via cash-flow-based lending models. Financial technology platforms continue to add merchant touchpoints at a steady clip. [RBI](#)

**Aviation Passenger Traffic Numbers Reflect Strong Discretionary Travel** Domestic airline passenger volumes grew on a YoY basis, driven by business travel and expanding regional airport connectivity. Fleet additions and improved seat load factors help carriers manage high aviation turbine fuel costs. Air cargo volumes are also rising, supported by express logistics and e-commerce demand. [Economic Times](#)

**Power Consumption Metrics Highlight Expanding Industrial Activity** National electricity generation and peak power demand levels remain elevated due to growing industrial and commercial operations. Thermal generation units maintain high plant load factors, while renewable energy sources are increasing their grid share. Power distribution entities are focusing on reducing operational losses through smart metering rollouts. [Economic Times](#)

**Telecom Sector Average Revenue Per User Follows Upside Trajectory** Data usage metrics across 5G networks indicate steady monetization paths for major telecom operators. Capital expenditure trends are transitioning from network deployment to digital service offerings and enterprise solutions. Consolidation within the sector ensures a stable pricing environment over the medium term. [Bloomberg](#)

**FMCG Rural Volume Trends Show Early Signs of Recovery** Packaged consumer goods companies report a gradual recovery in rural volume growth, helped by stable farm income projections. Urban market demand continues to be driven by premium product lines and quick-commerce channels. Operating margins are supported by steady direct-to-consumer supply chains. [Economic Times](#)

**Pharma Export Volumes Gain Ground in Heavily Regulated Markets** Formulation and active pharmaceutical ingredient shipments grew, supported by steady new product launches in overseas markets. Compliance upgrades across manufacturing facilities help reduce generic pricing pressures in major western regions. Complex biosimilar pipelines remain a key long-term growth driver for large firms. [Bloomberg](#)

**Agrochemical Sector Focuses on Balancing Channel Inventory Levels** Domestic crop protection firms are optimizing institutional inventory holdings ahead of seasonal peak application periods. Global pricing for technical-grade molecules has stabilized, reducing down-trading pressures within distribution networks. Export shipments are showing signs of volume recovery after a few quarters of destocking. [Economic Times](#)

**Coal Off-take Run-Rates Ensure Adequate Fuel Stocks at Power Utilities** Sustained domestic coal production and efficient rail wagon allocations have helped maintain steady fuel stock levels at major thermal power plants. This supply consistency reduces the need for expensive emergency fuel imports during high-demand periods. Port infrastructure is handling coastal coal movements efficiently. [Economic Times](#)

**Fertilizer Subsidy Allocations Provide Policy Clarity for Manufacturers** Clear direct benefit transfer guidelines and timely subsidy disbursements support working capital cycles for major fertilizer companies. Demand for complex nutrients remains strong ahead of the main sowing seasons across key agricultural states. Raw material import contracts are being secured at stable global spot prices. [Economic Times](#)

**Textile Export Order Books Build Up Amid Global Supply Shifts** Readymade garment and cotton yarn shipments are showing positive momentum as global retail supply chains diversify their sourcing. Domestic spinning mills report improved capacity utilization rates due to stable raw cotton prices. Modernization incentives continue to support capital investment plans for integrated players. [Bloomberg](#)

**Logistics Warehousing Absorption Supported by Organized E-Commerce** Demand for Grade-A warehousing space remains strong across major logistics corridors, driven by third-party logistics firms and rapid delivery networks. Automation upgrades within fulfillment centers are helping improve operational efficiencies. Investment from global institutional funds into industrial parks stays steady. [Economic Times](#)

**Renewable Energy Auction Capacities Hit New Execution Milestones** State-backed clean energy agencies continue to award large-scale solar, wind, and hybrid generation capacities to developers. Tariff levels have stabilized due to declining solar module costs and established domestic manufacturing capacities. Energy storage mandates are becoming a standard part of new grid-connected projects. [Bloomberg](#)

**Banking System Credit-to-Deposit Ratios Remain under Close Watch** Commercial banks are focusing on mobilizing retail deposits through competitive rate structures to support credit growth. Net interest margins are expected to consolidate as funding costs adjust across different deposit types. Asset quality remains stable, supported by strong corporate credit profiles. [RBI](#)

**Mutual Fund SIP Inflows Maintain Record Systemic Run-Rates** Systematic Investment Plan (SIP) configurations from retail investors continue to provide steady domestic liquidity to the equity markets. This regular cash flow

helps balance foreign portfolio shifts and acts as a stabilizing force for mid-cap and large-cap indices. Asset management companies are expanding their product offerings in thematic and passive funds. [Economic Times](#)

**Disclosures and Disclaimer**

Ventura Securities Limited (VSL) is a SEBI registered intermediary offering broking, depository and portfolio management services to clients. VSL is member of BSE, NSE and MCX-SX. VSL is a depository participant of NSDL. VSL states that no disciplinary action whatsoever has been taken by SEBI against it in last five years except administrative warning issued in connection with technical and venial lapses observed while inspection of books of accounts and records. Ventura Commodities Limited, Ventura Guaranty Limited, Ventura Insurance Brokers Limited and Ventura Allied Services Private Limited are associates of VSL. Research Analyst (RA) involved in the preparation of this research report and VSL disclose that neither RA nor VSL nor its associates (i) have any financial interest in the company which is the subject matter of this research report (ii) holds ownership of one percent or more in the securities of subject company (iii) have any material conflict of interest at the time of publication of this research report (iv) have received any compensation from the subject company in the past twelve months (v) have managed or co-managed public offering of securities for the subject company in past twelve months (vi) have received any compensation for investment banking merchant banking or brokerage services from the subject company in the past twelve months (vii) have received any compensation for product or services from the subject company in the past twelve months (viii) have received any compensation or other benefits from the subject company or third party in connection with the research report. RA involved in the preparation of this research report discloses that he / she has not served as an officer, director or employee of the subject company. RA involved in the preparation of this research report and VSL discloses that they have not been engaged in the market making activity for the subject company. Our sales people, dealers, traders and other professionals may provide oral or written market commentary or trading strategies to our clients that reflect opinions that are contrary to the opinions expressed herein. We may have earlier issued or may issue in future reports on the companies covered herein with recommendations/ information inconsistent or different those made in this report. In reviewing this document, you should be aware that any or all of the foregoing, among other things, may give rise to or potential conflicts of interest. We may rely on information barriers, such as "Chinese Walls" to control the flow of information contained in one or more areas within us, or other areas, units, groups or affiliates of VSL. This report is for information purposes only and this document/material should not be construed as an offer to sell or the solicitation of an offer to buy, purchase or subscribe to any securities, and neither this document nor anything contained herein shall form the basis of or be relied upon in connection with any contract or commitment whatsoever. This document does not solicit any action based on the material contained herein. It is for the general information of the clients / prospective clients of VSL. VSL will not treat recipients as clients by virtue of their receiving this report. It does not constitute a personal recommendation or take into account the particular investment objectives, financial situations, or needs of clients / prospective clients. Similarly, this document does not have regard to the specific investment objectives, financial situation/circumstances and the particular needs of any specific person who may receive this document. The securities discussed in this report may not be suitable for all investors. The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Persons who may receive this document should consider and independently evaluate whether it is suitable for his/ her/their particular circumstances and, if necessary, seek professional/financial advice. And such person shall be responsible for conducting his/her/their own investigation and analysis of the information contained or referred to in this document and of evaluating the merits and risks involved in the securities forming the subject matter of this document. The projections and forecasts described in this report were based upon a number of estimates and assumptions and are inherently subject to significant uncertainties and contingencies. Projections and forecasts are necessarily speculative in nature, and it can be expected that one or more of the estimates on which the projections and forecasts were based will not materialize or will vary significantly from actual results, and such variances will likely increase over time. All projections and forecasts described in this report have been prepared solely by the authors of this report independently of the Company. These projections and forecasts were not prepared with a view toward compliance with published guidelines or generally accepted accounting principles. No independent accountants have expressed an opinion or any other form of assurance on these projections or forecasts. You should not regard the inclusion of the projections and forecasts described herein as a representation or warranty by VSL, its associates, the authors of this report or any other person that these projections or forecasts or their underlying assumptions will be achieved. For these reasons, you should only consider the projections and forecasts described in this report after carefully evaluating all of the information in this report, including the assumptions underlying such projections and forecasts. The price and value of the investments referred to in this document/material and the income from them may go down as well as up, and investors may realize losses on any investments. Past performance is not a guide for future performance. Future returns are not guaranteed and a loss of original capital may occur. Actual results may differ materially from those set forth in projections. Forward-looking statements are not predictions and may be subject to change without notice. We do not provide tax advice to our clients, and all investors are strongly advised to consult regarding any potential investment. VSL, the RA involved in the preparation of this research report and its associates accept no liabilities for any loss or damage of any kind arising out of the use of this report. This report/document has been prepared by VSL, based upon information available to the public and sources, believed to be reliable. No representation or warranty, express or implied is made that it is accurate or complete. VSL has reviewed the report and, in so far as it includes current or historical information, it is believed to be reliable, although its accuracy and completeness cannot be guaranteed. The opinions expressed in this document/material are subject to change without notice and have no obligation to tell you when opinions or information in this report change. This report or recommendations or information contained herein do/does not constitute or purport to constitute investment advice in publicly accessible media and should not be reproduced, transmitted or published by the recipient. The report is for the use and consumption of the recipient only. This publication may not be distributed to the public used by the public media without the express written consent of VSL. This report or any portion hereof may not be printed, sold or distributed without the written consent of VSL. This document does not constitute an offer or invitation to subscribe for or purchase or deal in any securities and neither this document nor anything contained herein shall form the basis of any contract or commitment whatsoever. This document is strictly confidential and is being furnished to you solely for your information, may not be distributed to the press or other media and may not be reproduced or redistributed to any other person. The opinions and projections expressed herein are entirely those of the author and are given as part of the normal research activity of VSL and are given as of this date and are subject to change without notice. Any opinion estimate or projection herein constitutes a view as of the date of this report and there can be no assurance that future results or events will be consistent with any such opinions, estimate or projection. This document has not been prepared by or in conjunction with or on behalf of or at the instigation of, or by arrangement with the company or any of its directors or any other person. Information in this document must not be relied upon as having been authorized or approved by the company or its directors or any other person. Any opinions and projections contained herein are entirely those of the authors. None of the company or its directors or any other person accepts any liability whatsoever for any loss arising from any use of this document or its contents or otherwise arising in connection therewith. The information contained herein is not intended for publication or distribution or circulation in any manner whatsoever and any unauthorized reading, dissemination, distribution or copying of this communication is prohibited unless otherwise expressly authorized. Please ensure that you have read "Risk Disclosure Document for Capital Market and Derivatives Segments" as prescribed by Securities and Exchange Board of India before investing in Securities Market.

**Ventura Securities Limited - SEBI Registration No.: INH000001634**

*Corporate Office: I-Think Techno Campus, 8<sup>th</sup> Floor, 'B' Wing, Off Pokhran Road No 2, Eastern Express Highway, Thane (W) - 400608*