

Market Commentary

Overnight global action:

On 15th June 2026, US market delivered a positive performance with S&P500 up by +141.71 pts (1.91%), Dow Jones up by +731.78 pts (1.43%) and Nasdaq up by +915.56 pts (3.09%). Gift Nifty grew by 69 pts (0.29%) indicating Indian markets will open positively. Advance-Decline ratio on NSE was 2510:830 and on BSE was 3030:1384 which showed strength in the overall markets.

Index Options Data Analysis:

Sensex max call OI and put OI both are at 77500 with PCR of 0.77
Nifty max call OI and put OI both are at 24200 with PCR of 0.79
Bank Nifty max call OI and put OI both are at 56000 with PCR of 0.84

Securities in Ban for F&O Trade:

KAYNES

Sector Performance:

NIFTY AUTO index grew by 2.6% driven by UNO Minda Ltd. (+6.4%) and TVS Motor Company Ltd. (+4.43%)

NIFTY FMCG index grew by 0.44% driven by Varun Beverages Ltd. (+3.6%) and Emami Ltd. (+1.54%)

NIFTY REALTY index grew by 3.96% driven by Prestige Estates Projects Ltd. (+6.1%) and The Phoenix Mills Ltd. (+5.08%)

NIFTY OIL & GAS index grew by 1.53% driven by Chennai Petroleum Corporation Ltd. (+6.4%) and Aegis Vopak Terminals Ltd. (+6.35%)

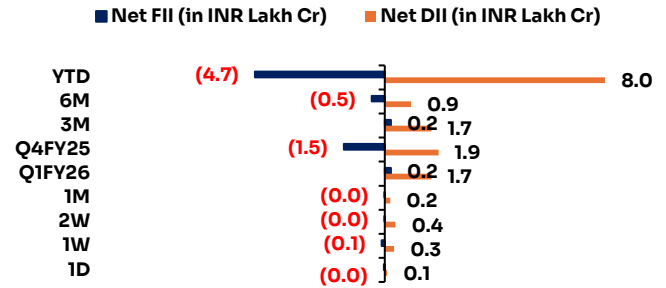
NIFTY CHEMICALS Index grew by 0.69% driven by Himadri Speciality Chemical Ltd. (+6.7%) and Coromandel International Ltd. (+1.92%)

NIFTY PSU BANK index grew by 0.62% driven by Central Bank Of India (+2.7%) and Bank Of Maharashtra (+2.08%)

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Fund Flow	Buy	Sell	Net
FII/FPI	15,650	15,450	200
DII	21,081	17,892	3,189



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,960	0.3%	-8.8%	21.7
Sensex 30	76,264	1.0%	-10.5%	19.9
Nifty 50	23,854	1.0%	-8.7%	21.6
India VIX	14	-3.2%	50.3%	
Nifty Bank	57,199	0.7%	-4.0%	16.8
Nifty Next 50	71,685	2.4%	3.4%	71.7
Nifty 500	22,891	1.3%	-4.1%	21.5
Nifty Mid 100	61,550	1.3%	1.8%	31.7
Nifty Small 250	17,293	1.3%	3.6%	29.1
USD/INR	94	-0.8%	5.0%	
India 10Y	6.9%			
India 2Y	6.2%			
India 1Y	5.9%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,573	1.9%	10.6%	32.8
Dow Jones	51,934	1.4%	8.1%	25.1
Nasdaq 100	30,552	3.1%	20.9%	50.2
FTSE 100	10,431	-0.4%	5.0%	16.5
CAC 40	8,384	0.4%	2.9%	24.6
DAX	24,903	1.1%	1.7%	26.0
Nikkei 225	69,318	5.0%	37.7%	37.0
Hang Seng	24,843	0.5%	-3.1%	12.1
Shanghai Cor	4,096	1.6%	3.2%	18.5
KOSPI	8,546	5.2%	102.8%	42.3
S&P/ASX 200	8,914	1.3%	2.3%	23.5

Stocks in the News

CITY UNION BANK LTD. (CMP: 200, MARKET CAP: 19766 Cr., SECTOR: BANK - PRIVATE)

The private lender's shares are set to witness high volatility on June 16, 2026, as trading commences in its newly allotted 24.76 crore bonus equity shares distributed in a 1:3 ratio. The Bonus Committee of the Board ratified the issuance of exactly 24,76,96,809 fully paid-up shares of face value Rs 1 each to eligible shareholders holding stock as of the June 12 record date. [HDFC Sky](#)

HDFC BANK LTD. (CMP: 777, MARKET CAP: 1196782 Cr., SECTOR: BANK - PRIVATE)

The banking heavyweight experiences fresh institutional demand as it edges closer to its crucial June 19, 2026 ex-dividend date for a payout of Rs 13 per equity share. Sell-side desks point to robust treasury positioning and defensive capital allocation shifting back into large-cap private lenders following systemic credit-to-deposit optimizations. Technically, the counter is exhibiting a strong reversal pattern from its multi-month support base, aiming to reclaim major short-term exponential moving averages.

[Bloomberg](#)

TATA MOTORS LTD. (CMP: 407, MARKET CAP: 149730 Cr., SECTOR: AUTOMOBILES-TRUCKS/LCV)

The automotive blue-chip displays strong derivative open interest build-up ahead of its scheduled ex-dividend date on June 19, 2026, for a dividend of Rs 3 per share. Market indicators reflect an accelerating product mix recovery within the commercial vehicle segment and sustained margin protection for passenger electric vehicle rollouts. Quantitative desks indicate the stock maintains a high relative strength index configuration. [Groww](#)

ASIAN PAINTS LTD. (CMP: 2739, MARKET CAP: 262739 Cr., SECTOR: PAINTS)

The paints market leader is positioned tightly in early trade as investors track the stock ahead of its key ex-dividend corporate action date on June 23, 2026, for a dividend of Rs 23 per share. Softening international crude derivative prices have relieved structural gross margin pressures, reinforcing the company's near-term pricing power and volume recovery models. Technical setups indicate the stock is forming a definitive rounding bottom base near key long-term psychological support lines. [NSE India](#)

Sectoral Inde

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	26,978	2.6%	-4.3%	22.2
Nifty IT	28,068	1.0%	-25.9%	21.9
Nifty Fin Ser	26,275	1.3%	-4.9%	17.2
Nifty Pharma	24,220	-0.7%	6.6%	39.8
Nifty Services	30,362	0.9%	-9.8%	33.4
Nifty Cons Du	35,996	2.9%	-2.1%	48.8
Nifty PSE	9,954	0.6%	1.0%	10.4
Nifty FMCG	49,043	0.4%	-11.6%	33.8
Nifty Pvt Bank	27,812	0.6%	-3.2%	10.4
Nifty PSU Banl	8,581	0.6%	0.6%	14.0
Nifty Cons	11,423	1.7%	-7.1%	40.4
Nifty Realty	800	4.0%	-8.9%	34.8
Nifty Infra	9,371	1.5%	-2.6%	21.7
Nifty Energy	39,494	0.6%	11.8%	12.5
Nifty Health	15,489	-0.4%	5.8%	37.1
Nifty India Mfg	15,912	1.6%	3.2%	29.6
Nifty Metal	13,084	1.8%	17.2%	23.4
Nifty Oil & Gas	11,181	1.5%	-8.6%	17.1

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
RADICO	25.8	1.4
MOTILALOFs	8.8	5.7
TATAPOWER	7.8	2.6
SIEMENS	6.8	0.8
APLAPOLLO	4.9	0.8
Short		
BAJAJ-AUTO	10.7	-0.9
COCHINSHIP	8.5	-1.4
GVT&D	6.1	-2.8
ONGC	5.9	-1.1
TATAELXSI	4.6	0.0
Long Unwinding		
MANKIND	-4.0	-0.1
TORNTPHARM	-3.9	-1.8
TIINDIA	-4.8	-2.8
SUNPHARMA	-1.9	-0.1
BIOCON	-1.8	-0.8
Short Covering		
SOLARINDS	-0.1	0.9
BAJAJFINSV	-3.2	0.7
EICHERMO	-0.1	0.8
JSWENERGY	-0.1	3.2

HINDUSTAN UNILEVER LTD. (CMP: 2156, MARKET CAP: 506548 Cr., SECTOR: HOUSEHOLD & PERSONAL PRODUCTS)

The fast-moving consumer goods behemoth draws defensive institutional flows ahead of its upcoming ex-dividend milestone on June 23, 2026, for a payout of Rs 22 per share. Gradual improvements in rural consumption trends and proactive price adjustments across core home-care segments remain primary top-line drivers for the quarters ahead. The technical chart exhibits a classic low-volatility consolidation pattern, highlighting strong underlying delivery volumes across major brokerage blocks.

[NSE India](#)

Commodity:	CMP	1D	YTD
Gold (\$)	4,352	2.7%	0.3%
Silver (\$)	70.2	3.3%	0.1%
Brent Oil (\$)	83.2	-4.8%	-0.2%
WTI Oil (\$)	80.5	-5.1%	-20.6%

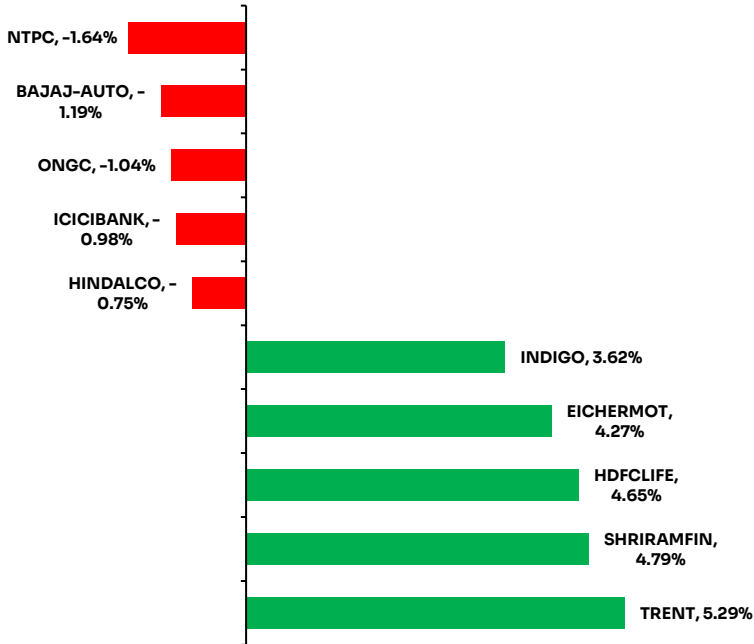
Currency	CMP	1D	YTD
USD/INR	94.7	-0.4%	0.0%
EUR/INR	109.9	-0.1%	0.1%
GBP/INR	127.2	-0.3%	0.1%
JPY/INR	0.6	-0.4%	0.1%
EUR/USD	1.2	0.3%	0.1%

Securities Lending & Borrowing Scheme (SLBS)

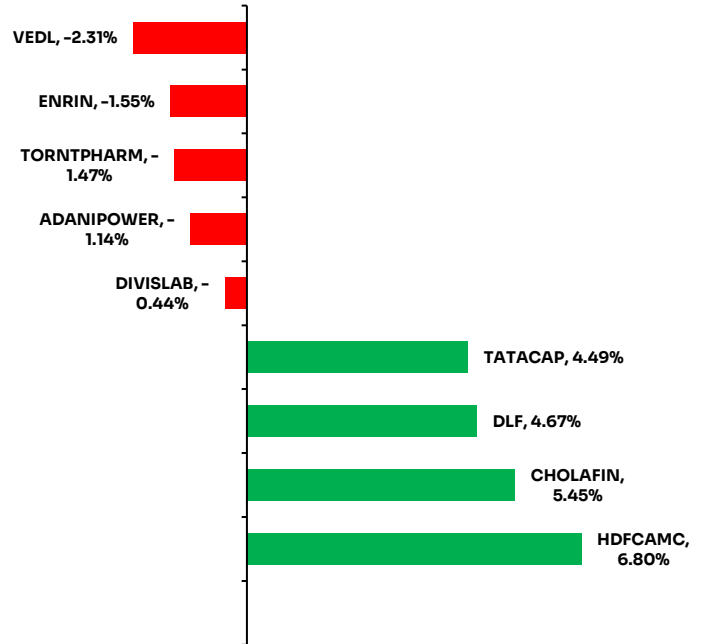
Company	Under.Ltp	Fut.Ltp	Spread (%)
HDFCBANK	777.45	766.75	1.38
KAYNES	3,078.00	3,050.20	0.9
NAM-INDIA	1,142.00	1,132.10	0.87
LICI	406.10	402.90	0.79
COCHINSHIP	1,411.60	1,400.80	0.77

Top Gainers and Losers

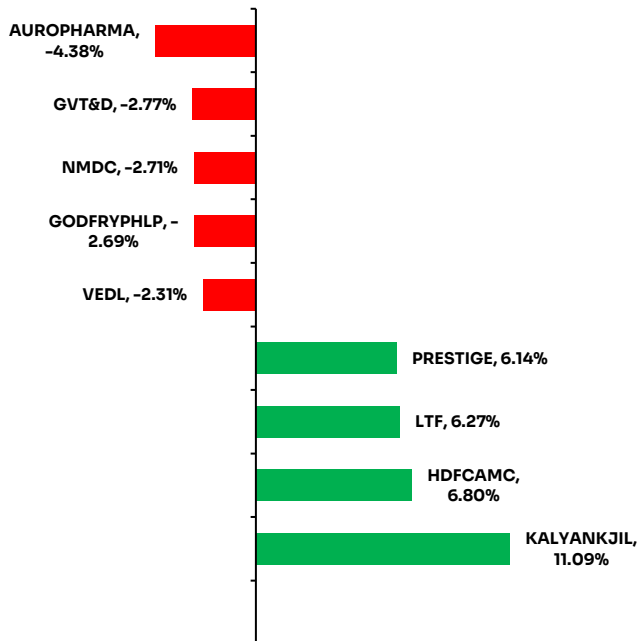
Nifty 50 index



Nifty Next 50 index



Nifty 200 index



52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
FEDERALBNK	317	321	318	12-Jun-26
BANDHANBNK	210	215	213	4-May-26
ANGELONE	352	356	351	26-May-26
EMMVEE	337	352	346	12-Jun-26
CUPID	165	165	160	12-Jun-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
SBILIFE	1,705	1,700	1,704	11-Jun-26
RAJESHEXPO	80	73	76	12-Jun-26
RAJESHEXPO	80	73	76	12-Jun-26
VPRPL	26	24	25	11-Jun-26
PELATRO	260	253	254	29-May-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
HINDWAREAP	10,879	2,224	1,148	256
AIIL	19,071	3,942	2,197	521
EXXARO	8,239	1,726	922	8
WENDT	196	41	22	7,730
CAPILLARY	5,665	1,201	610	511
ROTO	17,741	3,869	2,362	65
MMTC	86,050	18,844	14,992	68
RELCHEMQ	116	25	14	143
MANALIPETC	9,295	2,055	1,495	65
NKIND	4	1	1	62
JINDWORLD	23,881	5,462	3,674	30
MSCIINDIA	215	49	35	29
INDIASHLTR	673	155	101	780
LAXMIDENTL	2,059	487	363	226
EGOLD	1,318	313	307	148
HAVISHA	750	179	95	1
TOP10ADD	1,609	399	284	87
BETA	181	45	28	1,771
WPIL	329	82	50	459
MOMGF	6	2	1	157
GILTIOBETA	7	2	1	26
TTML	55,069	14,247	11,324	46
TBZ	4,353	1,142	1,678	184
ZFSTEERING	20	5	5	648

Bulk Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
AGARIND	Nk Securities Research Private Limited	SELL	106	552.7
AGIIL	Arihant Capital Markets Limited	BUY	1311	381.6
AGIIL	Arihant Capital Markets Limited	SELL	1311	381.8
AQYLON	Leading Leasing Finance & Investment Company Ltd	BUY	3190	56.2
ASHOKA	Qe Securities Llp	BUY	1585	136.0
ATALREAL	Altizen Ventures Llp	SELL	1839	30.4
ATALREAL	Altizen Ventures Llp	BUY	2316	30.2
ATALREAL	Hrti Private Limited	SELL	421	30.3
ATALREAL	Hrti Private Limited	BUY	1053	30.3
ATALREAL	Vishal Mahesh Waghela	BUY	376	30.5
ATALREAL	Vishal Mahesh Waghela	SELL	635	30.2
ATALREAL	Vishal Mahesh Waghela	SELL	992	30.4
ATALREAL	Vishal Mahesh Waghela	BUY	1620	30.4
BABAFP	Saurabh Shrivastava	SELL	114	18.8
BANG	Nishant Pitti	SELL	68	30.6
ENCOMPAS	Radiant Global Fund - Class B Participating Shares	SELL	120	229.0
EXICOM	Hrti Private Limited	SELL	1394	156.9
EXICOM	Hrti Private Limited	BUY	1589	158.6
EXICOM	Junomoneta Finsol Private Limited	BUY	1497	159.1
EXICOM	Junomoneta Finsol Private Limited	SELL	1508	159.0
EXICOM	Microcurves Trading Private Limited	BUY	1719	161.4
EXICOM	Microcurves Trading Private Limited	SELL	1719	161.4
EXICOM	Nk Securities Research Private Limited	BUY	962	160.2
EXICOM	Nk Securities Research Private Limited	SELL	962	160.3
EXICOM	Qe Securities Llp	BUY	1120	157.8
EXICOM	Qe Securities Llp	SELL	1165	157.1
GALAPREC	Nk Securities Research Private Limited	SELL	95	1,042.4
GALAPREC	Nk Securities Research Private Limited	BUY	95	1,041.6
GCSL	Mansukh Securities & Finance Limited	SELL	68	433.6
GCSL	Mansukh Securities & Finance Limited	BUY	136	430.2
GENXAI	Neo Apex Share Broking Services Llp	SELL	100	102.3
GOCOLORS	Crony Vyapar Pvt Ltd	SELL	240	376.0
GOCOLORS	Crony Vyapar Pvt Ltd	BUY	284	376.0
GOCOLORS	Parth Infin Brokers Pvt Ltd	SELL	299	377.4
GOCOLORS	Parth Infin Brokers Pvt Ltd	BUY	308	376.6
GOCOLORS	Ramdoot Realtors Pvt Ltd	SELL	290	373.6
GOCOLORS	Ramdoot Realtors Pvt Ltd	BUY	321	374.5
GREENLEAF	Singasandra Nagappa Mahadeva	SELL	45	60.8
K2INFRA	Shivarjun Byrapaneni Rao	SELL	83	59.7
KANDARP	Altizen Ventures Llp	SELL	70	109.0
KANDARP	Raavi Enterprise	BUY	45	108.9
LAL	Kiwi Dealcom Private Limited	SELL	1500	7.0
LAMOSAIC	Jay Manilal Chheda	SELL	90	29.0
LAMOSAIC	Laxmi Vinod Visaria	SELL	63	29.0

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
MOTISONS	Arihant Capital Markets Limited	SELL	16782	15.5
MOTISONS	Arihant Capital Markets Limited	BUY	18562	15.5
MOTISONS	Hrti Private Limited	SELL	6773	15.5
MOTISONS	Hrti Private Limited	BUY	6803	15.5
MOTISONS	Junomoneta Finsol Private Limited	SELL	7024	15.5
MOTISONS	Junomoneta Finsol Private Limited	BUY	7312	15.5
MPEL	Jimitkumar Dilipkumar Sanghvi	BUY	78	41.0
MPEL	Linton Consultants Private Limited	SELL	96	41.1
MSTCLTD	Hrti Private Limited	SELL	313	630.4
MSTCLTD	Hrti Private Limited	BUY	370	629.1
MTARTECH	Hrti Private Limited	SELL	157	7,320.0
MTARTECH	Hrti Private Limited	BUY	165	7,315.4
MYMUDRA	Hetal Dhruval Bhatt	SELL	58	74.4
MYMUDRA	Kirti Ravi Kothari	BUY	68	74.5
NARMADA	Msb E Trade Securities Limited	SELL	321	37.2
NARMADA	Msb E Trade Securities Limited	BUY	333	37.4
ONDOOR	Shreyans Nahar .	BUY	35	180.7
PARAS	Junomoneta Finsol Private Limited	SELL	404	1,101.0
PARAS	Junomoneta Finsol Private Limited	BUY	405	1,100.6
PRESSTONIC	Pushpa Bhaju	SELL	84	30.3
SHANTIGOLD	Arihant Capital Markets Limited	BUY	411	232.7
SHANTIGOLD	Arihant Capital Markets Limited	SELL	553	231.3
SPAL	Nk Securities Research Private Limited	BUY	347	896.8
SPAL	Nk Securities Research Private Limited	SELL	347	897.3
VISL	Pi Opportunities Aif V Llp	BUY	48371	21.0
VOLERCAR	Prognosis Securities Pvt. Ltd	BUY	58	258.3
VOLERCAR	Prognosis Securities Pvt. Ltd	SELL	58	256.3
VOLERCAR	Wealthwise Capital	BUY	116	258.2

Block Deals

Security Name	Client Name	Buy / Sell	Qty (in 000)	Price (in 000)
	No Deals			

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

Company	Purpose
Ganga Forging Limited	Board meeting
Narmada Agrobases Limited	Other business matters
Tembo Global Industries Limited	Stock Split
Vertoz Limited	Fund Raising

Nifty & Bank Spot – Pivot Levels 16/06/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23853.90	23776	23699	23582	23970	24087	24164
Bank Nifty	57198.80	56943	56688	56258	57628	58058	58313

Eicher Motors Ltd – Technical Stock Call – 16/06/2026

Technical Stock Call	Action	Reco	Target	Support	SL
EICHERMOT	BUY	7639	9400	(7451-7302)-7198-(7093-6964)	6752



View – Medium Term Bullish

The stock commenced its downtrend from 8230 (FEB 26). Thereafter, formation of Down Gaps and sustained trading below key averages indicated weakness, as the stock extended its decline to mark a low of 6442 (APR 26), breaching the 200 SMA.

Buying emerged & the stock commenced its up move forming Up Gaps & gradually reached a high of 7435.50 (APR 26), but faced resistance in that area & witnessed a minor correction. Thereafter, the stock entered a consolidation phase, trading within a narrow range around key averages and further corrected towards 6752.50 (MAY 26).

Again the stock rallied higher & reached a high of 7441 (MAY 26). Recently, after forming higher bottoms, the stock has given a **Symmetrical Triangle Breakout** supported by volume with a Bullish candle reaching to a high of 7643.50 (JUN 26), which is higher than the previous swing highs.

MACD, Aroon & RSI indicators suggest Positive crossover. The 200 SMA is in rising mode.

Target of **9400** is expected with lower support levels at **(7451-7302)-7198-(7093-6964)** in case of intermediate fall. A stop loss at **6752** is to be followed for the trade.

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

The Phoenix Mills Ltd – Technical Stock Call – 16/06/2026

Technical Stock Call	Action	Reco	Target	Support	SL
PHOENIXLTD	BUY	1860	2380	(1810-1762)-1731-(1694-1652)	1600



View – Medium Term Bullish

The stock commenced its downtrend from 1993 (JAN 26).

Thereafter, the stock breached 200 SMA & further forming lower tops extended the decline to mark a low of 1465.60 (MAR 26).

The stock attracted buying interest commenced its up move forming Up Gaps & gradually reached a high of 1855.90 (MAY 26), but could not surpass its previous high & witnessed a minor correction reaching a low of 1675 (JUN 26).

Again the stock rallied higher & reached a high of 1814.20 (JUN 26). Recently, after forming higher bottoms, the stock has given a **Symmetrical Triangle Breakout** supported by volume with a Bullish candle reaching to a high of 1861.60 (JUN 26), which is higher than the previous swing highs.

MACD, Aroon & RSI indicators suggest Positive crossover.

Target of **2380** is expected with lower support levels at **(1810-1762)-1731-(1694-1652)** in case of intermediate fall.

A stop loss at **1600** is to be followed for the trade.

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Global Macro Events (16th June 2026)		
Event	Previous	Forecasted
India		
Passenger Vehicles Sales YoY MAY	0.025	
USA		
ADP Employment Change Weekly	29K	
Building Permits Prel MAY	1.423M	1.41M
Housing Starts MAY	1.465M	1.44M
Building Permits MoM Prel MAY	0.044	-0.006
Export Prices MoM MAY	0.033	0.014
Housing Starts MoM MAY	-0.028	-0.02
Import Prices MoM MAY	0.019	0.013
Export Prices YoY MAY	0.088	0.104
Import Prices YoY MAY	0.042	0.06
NY Fed Services Activity Index JUN	-5.8	
Redbook YoY JUN/13	0.091	
6-Week Bill Auction	0.036	
20-Year Bond Auction	0.05122	
China		
House Price Index YoY MAY	-0.035	-0.034
Industrial Production YoY MAY	0.041	0.047
Retail Sales YoY MAY	0.002	0.008
Fixed Asset Investment (YTD) YoY MAY	-0.016	-0.023
Unemployment Rate MAY	0.052	0.052
FDI (YTD) YoY MAY	-0.103	-0.11
Great Britain		
Treasury Gilt 2036 Auction	0.05026	
Germany		
Bundesbank Balz Speech		
ZEW Economic Sentiment Index JUN	-10.20	-8
ZEW Current Conditions JUN	-77.80	-77.4
5-Year Bobl Auction	0.03	

##STOCK SPECIFIC NEWS

Bajaj Finance

The retail non-banking financial champion shows substantial bullish momentum as market participants position portfolios before the June 30, 2026 ex-dividend cut-off for a Rs 6 payout. Strong digital platform customer acquisitions and stable asset quality metrics mitigate broader macroeconomic concerns regarding unsecured loan growth tracking. The counter has successfully cleared its near-term horizontal resistance limits on volume-backed momentum.

[NSE India](#)

Bajaj Finserv

The financial services conglomerate witnesses synchronized derivative accumulation matching its underlying lending subsidiary, with focus on the upcoming Rs 1.50 per share dividend tracking toward June 30, 2026. Consistent premium collections inside life and general insurance arms sustain healthy return on equity projections across challenging macroeconomic cycles. Technical indicators highlight a decisive bullish cross over major medium-term moving average parameters.

[NSE India](#)

Shriram Finance

The commercial vehicle financing leader gains strong thematic traction as investors adjust long positions prior to the July 3, 2026 ex-dividend timeline for a Rs 6 per share allocation. Sustained freight demand across core manufacturing corridors continues to lower credit cost structures, keeping net interest margins resilient. The stock continues to print higher-high bars on its daily charts, indicating clear outperformance against the broader financial sector index.

[NSE India](#)

Tech Mahindra

The information technology exporter experiences selective long roll-overs as traders anticipate its major corporate dividend action of Rs 36 per share scheduled for July 3, 2026. While European enterprise spending remains cautious, healthy deal pipelines in automated cloud architecture and AI-driven solutions support baseline revenue guidance parameters. Technical overlays suggest a steady recovery off the 200-day moving average, signaling long-term institutional accumulation.

[NSE India](#)

Axis Bank

The private sector banking entity witnesses active position building ahead of its announced dividend corporate action of Re 1 per share fixed for July 10, 2026. Declining slippage ratios and solid loan disbursements across corporate industrial projects continue to boost underlying net interest income growth trajectories. The technical chart highlights strong consolidation with shrinking daily trading ranges, which usually precedes a sharp directional breakout.

[NSE India](#)

Larsen & Toubro

The engineering conglomerate gains notable traction in early June 16, 2026 trading following sustained international capital allocation inflows toward domestic infrastructure proxies. Strong order book execution schedules across major clean energy transmission corridors ensure clear revenue visibility over the next fiscal cycle. The counter exhibits structural outperformance, holding comfortably above its short-term exponential moving averages.

[The Hindu](#)

InterGlobe Aviation

The operator of IndiGo airlines registers strong volume support as lower international jet fuel inputs improve forward-looking profitability models. Dominant domestic passenger market shares and expanding global flight paths sustain multi-year capacity utilization targets across core regional networks. Technical indicators indicate an upside breakout past a major descending triangle pattern on high institutional volumes.

[The Hindu](#)

Titan Company

The consumer discretionary major sees steady accumulation over expectations of stable luxury consumption recovery across urban geographical segments. Continued network expansions within its premium jewelry and eyewear divisions support healthy average transaction value metrics despite broader inflationary trends. The price action shows strong support at historical trendlines, indicating active positional buying by domestic mutual funds.

[The Hindu](#)

State Bank of India

The state-run banking giant benefits from steady domestic fund inflows as institutional desks balance public sector risk exposures with high asset quality comfort. Improving return on asset matrices and strong credit growth pipelines from corporate infrastructure mandates reinforce long-term core earnings targets. The stock continues its orderly uptrend, respecting its 50-day moving average support during recent market corrections.

[The Hindu](#)

Reliance Industries

The index heavyweight functions as a critical structural stabilizer for the broader market as its digital telecom arm exhibits higher data monetization velocity. Upstream production field optimizations and stable refining margin parameters provide a solid cushion against global commodity fluctuations. Technical chart patterns reflect a classic inverse head-and-shoulders breakout, forecasting intermediate positive trend persistence.

[The Hindu](#)

ICICI Bank

The private banking major demonstrates strong operational resilience with expanding net interest income backed by highly digitized retail asset originations. Core capital adequacy ratios remain well above regulatory limits, allowing sustained credit expansion across high-yielding commercial segments. The counter is currently breaking out from a multi-week horizontal base channel on ascending delivery volumes.

[The Hindu](#)

Trent

The fast-growing retail champion receives structural premium valuations as its value fashion format records industry-leading footfall densities across tier-2 cities. Efficient supply chain rotations and high inventory turnover ratios shield corporate operating margins against general textile input cost pressures. The stock continues to chart uncharted territory, establishing fresh lifetime highs with no visible technical overhead resistance.

[The Hindu](#)

UltraTech Cement

The infrastructure flagship charts steady gains as solid domestic cement production data confirms rising capacity utilization across regional manufacturing units. Planned brownfield expansions aimed at capturing regional commercial infrastructure demand help maintain market-share leadership. The chart structure indicates a strong volume-backed bounce off immediate horizontal support levels, confirming buyer interest at lower valuations.

[The Hindu](#)

Bharti Airtel

The telecom operator exhibits a robust technical setup as institutional buyers consistently pile into the stock, viewing it as a resilient data play. Elevated data consumption run-rates across premium 5G networks continue to bolster average revenue per user metrics without requiring massive incremental capital expenditure. The stock is holding its multi-month rising channel structure, showing exceptional relative strength against cyclical market segments.

[The Hindu](#)

SECTION 2: CORPORATE ANNOUNCEMENTS

Bitmine Immersion Technologies / Disclosure of Massive Digital Asset Reserves

The corporate board officially announced on June 16, 2026, that its treasury now holds 5.62 million Ethereum tokens valued at \$10.4 billion, representing 4.66% of the total global ETH coin supply. The disclosure confirms that \$8.1 billion is currently staked, generating an estimated annualized staking reward stream of approximately \$219 million to fund global technology infrastructure scaling.

[Official Filing](#)

National Stock Exchange of India / Board Approvals for Draft Red Herring Prospectus Submission

The exchange board finalized compliance parameters on June 16, 2026, for its upcoming Initial Public Offering, structuring the entire issue as an Offer for Sale. The filing confirms total Q4 FY26 consolidated profit after tax at Rs 2,871 crore against a total income of Rs 5,360 crore to satisfy SEBI listing protocols.

[Official Filing](#)

City Union Bank / Corporate Bonus Equity Shares Allotment Execution

The Bonus Committee of the Board filed official corporate action completions with stock exchanges on June 16, 2026, confirming the formal allotment of 24,76,96,809 fully paid-up bonus shares. The execution modifies the listed equity base in a 1:3 ratio for all verified electronic share records.

[Official Filing](#)

HDFC Bank / Ex-Dividend Record Registration Details

The secretarial desk submitted formal regulatory compliance notices confirming the structural setup and shareholder verification parameters for its upcoming Rs 13 per share corporate dividend distribution.

[Official Filing](#)

Tata Motors / Shareholder Remuneration Intimation

The board of directors submitted automated exchange filings confirming structural clearance for the processing of its Rs 3 per equity share final dividend distribution scheme.

[Official Filing](#)

Asian Paints / Dividend Distribution Timeline Verification

The treasury department filed official notifications with market regulators outlining the bank validation dates for its scheduled Rs 23 per equity share corporate payout.

[Official Filing](#)

Hindustan Unilever / Capital Payout Scheme Confirmation

The compliance team released regulatory statements confirming that its upcoming final corporate dividend execution of Rs 22 per share will proceed using updated shareholder depository files.

[Official Filing](#)

SECTION 3: MACRO / NON-STOCK NEWS

Gift Nifty Open Interest Builds Target Near-Term Consolidation Range

Early derivative formations for the benchmark index indicate a prominent positioning band developing between 23,500 and 24,200 as the June trading cycle progresses. Option chain metrics show significant call writing concentration at upper psychological resistance levels, which keeps near-term index gains measured. Implied volatility indices show a minor drop to 14.72, lowering the probability of unexpected short-term market corrections.

[StockEdge](#)

Nifty 50 Defends Crucial Support Base Driven by Large-Cap Rebound

The benchmark Nifty 50 index settled higher at 23,622.90, gaining 1.99% as baseline institutional asset buying halted a continuous multi-session correction phase. Market breadth improved sharply with 39 advancing components against 11 declines within the index, signaling a healthy rotation into frontline blue-chips. The short-term price trend indicates steady consolidation inside a constructive multi-month falling channel setup.

[NSE India](#)

BSE Sensex Surges 1,695 Points Following Global Geopolitical Relief

The headline Sensex index jumped 2.30% to settle firmly at 75,527.95, following sharp rallies across global equity markets after formal declarations regarding West Asia de-escalation. The single-day move was supported by a notable 3.98% drop in global Brent crude prices to \$86.78 per barrel, which directly favors large-cap manufacturing margins. Quantitative fund desks note that index pricing has successfully reclaimed its key short-term exponential averages.

[The Hindu](#)

Institutional Flow Disparities Balanced by Massive DII Cash Inflows

Provisional trading metrics reflect distinct strategies between institutional desks, with Foreign Institutional Investors executing net sales worth Rs 1,082.18 crore in cash markets. This distribution was completely countered by Domestic Institutional Investors, who recorded a net purchase of Rs 5,341.29 crore, absorbing secondary market supply. The persistent domestic mutual fund liquidity continues to prevent structural breakdowns in benchmark indices.

[NSE India](#)

Domestic Growth Projections Hold Resilient in Challenging Global Conditions

The Economic Survey highlights India's stable medium-term growth capacity, projecting real GDP expansion in the range of 6.8% to 7.2% for the ongoing fiscal cycle. Strong manufacturing GVA expansions alongside sustained policy support through Production Linked Incentive schemes underpin this expansionary economic cycle. Economists point out that structural infrastructure enhancements will continue to act as an anchor against external demand slowdowns.

[PIB](#)

Industrial Output Data Confirms Steady Expansion and Base Metal Demand

The Index of Industrial Production (IIP) registered a 4.1% year-on-year expansion, with the core manufacturing sector advancing 4.3% to demonstrate a resilient domestic industrial framework. High-capacity performance within mobility and technology-linked segments helps balance variable export orders from Western economies. Financial desks note that this steady expansion pace supports long-term corporate credit growth projections.

[IBEF](#)

Goods and Services Tax Inflows Show Consistent Revenue Collections

Total net GST collections maintained strong momentum, reaching Rs 1.78 lakh crore to reflect stable compliance tracking and vibrant economic activity. Sustained transaction run-rates across major manufacturing states provide the government with a comfortable fiscal cushion to continue its capital expenditure programs. This revenue stability helps manage the national fiscal deficit targets without requiring mid-term budget cuts.

[IBEF](#)

Manufacturing PMI Trends Remain in Expansion Territory Above Neutral Mark

The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index printed a solid 53.9, indicating continued growth across core industrial operations. Rising new order inflows and strategic inventory building prompt firms to increase employment and scale up input purchases. The data confirms that industrial capacity expansion remains resilient despite higher corporate borrowing costs.

[IBEF](#)

Services Sector Growth Metrics Accelerate on Strong Urban Consumption

High-frequency services indicators show an annual expansion rate of 9.1%, driven by rapid digital transformation and expanding corporate logistics networks. Healthy job creation patterns through digital platforms continue to support discretionary spending across premium travel and retail segments. Input cost pressures remain well-contained through ongoing automated productivity enhancements.

[PIB](#)

Agricultural Output Performance Stabilizes Underlying Rural Demand Cycles

The agricultural sector recorded an estimated 3.1% growth rate, supported by favorable monsoon progress across primary central cultivation belts. Higher rural income security directly drives volume recoveries for fast-moving consumer goods and entry-level two-wheeler categories. Analysts project that stable food production trends will assist the central bank in managing long-term inflation targets.

[PIB](#)

Strategic Rice and Wheat Procurement Targets Secure National Food Stocks

The central government set a calibrated wheat procurement target of 343.35 lakh metric tonnes for the rabi marketing season to manage public buffers efficiently. Smooth procurement execution across major agrarian hubs ensures stable supply lines for domestic distribution networks, lowering open-market price volatility. This comfortable stock positioning mitigates near-term agricultural terms-of-trade shocks.

[IBEF](#)

Production Linked Incentive Investments Catalyze Manufacturing Job Creation

Actual investments across 14 distinct PLI sectors crossed the Rs 2.0 lakh crore threshold, generating incremental production and sales exceeding Rs 18.7 lakh crore. This structural policy support has directly created over 12.6 lakh specialized jobs, boosting technology-intensive sectors. The ongoing factory commissionings continue to enhance India's long-term export diversification potential.

[PIB](#)

Technology and Mobility Segments Lead Manufacturing Value-Add Metrics

Data from technology-linked manufacturing lines show substantial growth, with computer, electronic, and optical products expanding by 34.9%. Motor vehicle and transport equipment production grew by 33.5%, reflecting strong domestic demand for premium passenger models and commercial fleet upgrades. These high-value segments are increasingly contributing a larger share to overall industrial GVA.

[PIB](#)

Core Sector Indicators Highlight Sustained Infrastructure Construction Activity

Cement production registered a sharp 13.5% year-on-year surge, while finished steel output grew by 6.9% to confirm active infrastructure development. Robust demand from national highway expansions and railway modernization programs supports high volume offtake for primary producers. This industrial activity offsets softer export demand in baseline metals.

[PIB](#)

Services Export Revenues Hit Record Highs to Balance External Accounts

India's total services exports reached an all-time high of USD 387.5 billion, registering a robust 13.6% year-on-year expansion rate. The growth is led by Global Capability Centers expanding their specialized tech footprints across major metropolitan hubs. This strong services performance helps narrow the net current account deficit against volatile global trade lines.

[PIB](#)

National Career Service Registrations Track Shifting Labor Market Flows

The government's primary employment platform saw registered job seekers climb past 5.9 crore, alongside 53 lakh verified job providers. A significant mobilization of approximately 8 crore vacancies across diverse industrial sectors reflects an increasingly formalized labor market structure. Treasury desks monitor this data to evaluate long-term urban wage growth trends.

[PIB](#)

Sovereign Bond Yields Steady Ahead of High-Frequency Macro Releases

The benchmark 10-year government bond yield consolidated inside a tight trading band as domestic fixed-income managers balanced portfolio durations. Attractive real yields relative to emerging market peers continue to draw steady foreign portfolio investment into index-eligible debt papers. The Reserve Bank's careful liquidity management keeps short-term interbank call money rates well within the repo corridor.

[RBI](#)

Global Energy Vulnerabilities Highlight Potential Import Cost Pressures

International macroeconomic reports indicate that severe supply lane disruptions could push average Brent crude oil prices back toward 94 USD per barrel. While current benchmarks have stabilized near \$86, local energy analysts note that any sustained price increases could impact the domestic fuel subsidy framework. Local oil marketing firms maintain comfortable inventory cushions to manage short-term price adjustments.

[Times of India](#)

Corporate Debt Yield Spreads Compress on Improving Balance Sheets

Spreads between high-grade corporate bonds and sovereign benchmarks narrowed further, reflecting healthy corporate credit profiles. Rating upgrades continue to outpace downgrades across power generation and logistics entities, lowering long-term refinancing risks. Institutional appetite for commercial paper remains strong, driven by liquid fund allocations.

[Bloomberg](#)

Real Estate Inventory Transacting Reflects Premium Housing Absorption

Residential sales metrics across top metropolitan areas indicate stable absorption rates, with buyers showing a clear preference for premium gated developments. Commercial office leasing remains supported by multinational corporations setting up new engineering centers. Project financing terms are stable, backed by rising domestic private equity participation.

[Bloomberg](#)

Digital Payments Integration Drives Cash-Flow-Based Consumer Lending

The Unified Payments Interface recorded elevated transaction velocities, confirming deep financial integration within semi-urban micro-markets. This growing digital footprint allows fintech platforms to expand structured small-ticket consumer credit solutions efficiently. Traditional private lenders are increasingly partnering with these digital channels to scale their retail asset books.

[RBI](#)

Aviation Passenger Trajectories Support Multi-Year Fleet Expansion Programs

Domestic airline passenger traffic expanded on a year-over-year basis, driven by resilient corporate travel budgets and active regional airport networks. Improved passenger load factors assist commercial carriers in

offsetting variable fuel inputs and maintenance expenditures. Air freight volumes are also tracking higher, supported by quick-commerce supply frameworks.

[Economic Times](#)

National Electricity Generation Levels Reflect Intense Industrial Activity

Electricity generation metrics remain high, with core thermal units operating at elevated plant load factors to meet commercial peak demand. Renewable energy additions continue to increase their share within the national grid structure, supported by aggressive state-level solar bidding processes. Power distribution companies are prioritizing smart metering rollouts to minimize transmission losses.

[Economic Times](#)

Telecom Pricing Stability Underpins Long-Term Cash Flow Visibility

Data utilization trends across high-speed networks indicate clear monetization pathways for frontline telecom operators as 5G adoption increases. Capital allocation strategies are transitioning from basic network installations toward specialized enterprise network designs. A steady pricing environment supports predictable operating income expectations for the medium term.

[Bloomberg](#)

FMCG Volume Rebound Aided by Direct-to-Consumer Supply Models

Packaged consumer goods entities report a gradual volume recovery in rural corridors, assisted by positive early monsoon advancement forecasts. Urban demand patterns remain centered on premium product tiers via quick-commerce distribution channels. Operating margins are supported by well-optimized logistics networks and steady raw material costs.

[Economic Times](#)

Pharmaceutical Formulation Shipments Rise on Regulated Generic Launches

Pharmaceutical and active ingredient exports expanded, driven by new generic and biosimilar product rollouts in overseas markets. Plant compliance upgrades help manage competitive pricing pressures within Western distribution networks. Specialized medicine development pipelines remain a key driver for large corporate earnings.

[Bloomberg](#)

Agrochemical Channel Inventory Levels Rebalance Ahead of Peak Sowing

Crop protection firms are aligning institutional inventory levels with distributors to match upcoming seasonal agricultural requirements. Technical-grade raw material prices have leveled off, reducing the risk of sudden gross margin compression. Export volumes are showing initial recovery signs after consecutive quarters of global destocking.

[Economic Times](#)

Coal Delivery Run-Rates Prevent Fuel Deficits at Thermal Utilities

Steady domestic coal mining and well-coordinated rail freight movements have helped build comfortable fuel buffers at primary power plants. This localized supply security avoids the need for emergency, high-cost fuel imports during peak seasonal demand periods. Port logistics setups handle coastal commodity transfers efficiently.

[Economic Times](#)**Fertilizer Offtake Numbers Stabilize on Improving Input Sourcing**

Domestic fertilizer production and distribution tracking match seasonal demand forecasts, supported by stable government subsidy policies. Access to international gas raw materials at reasonable prices has assisted manufacturers in keeping production costs predictable. Distribution across primary agricultural belts remains smooth due to active logistical coordination.

[Economic Times](#)**Global Market Adjustments Present Short-Term Headwinds for Tech Sectors**

Wall Street benchmarks recorded modest pullbacks, with technology indices showing minor corrections as fund managers rotated capital into defensive value segments. This soft global cue structure presents short-term sentiment headwinds for high-beta local IT exporters. Traders expect selective capital rotation into domestic infrastructure proxies to continue.

[Sharekhan](#)

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