

Weekly Wrap

05th June 2026





Market Review

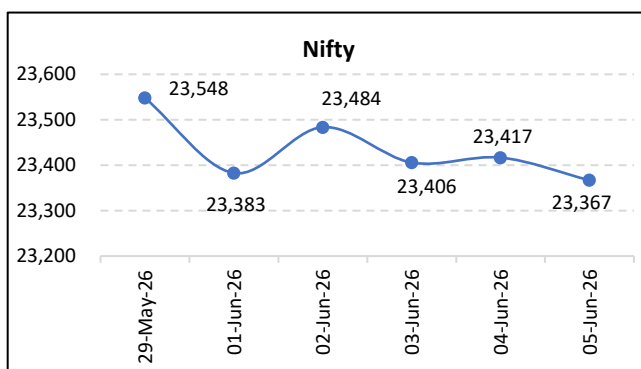
It was a week of consolidation for the Indian equity market amidst high volatility as investors digested the continuing uncertainty in West Asia, continued FII selling as well as the outcome of the RBI MPC meeting. The benchmark indices Nifty 50 and the Sensex ended 0.8%/0.7% lower on a WoW basis. Broader market performance was also mixed with the Midcap index losing 1.2% while the Smallcap index outperformed with a 0.2% gain during the week. The RBI in its policy maintained status quo on the benchmark interest rates. However, it lowered the GDP growth estimate for FY27 to 6.6% from 6.9% previously while at the same time raised the FY27 CPI forecast by 50 bps to 5.1%, factoring in the disruptions due to the West Asia crisis as well as the weak monsoon prediction. The central bank also announced several measures to attract foreign capital. The Govt of India also brought an ordinance to amend the Income Tax Act exempting FIIs from capital gains tax on their G-Sec investments and withholding tax on interest income earned from G-Secs. These measures appeared to boost the sentiment with the rupee gaining 0.9% to end below the 95/\$ mark on Friday. The pace of Bulk and Block deals also picked up this week especially in recently listed companies where PE funds are sitting on healthy gains. The Govt of India too has begun offloading stakes in PSU companies via the OFS route, selling 6% stake in NHPC this week after the 2% stake sale in Coal India last week. On the weather front, the South West monsoon finally arrived on the Indian mainland, reaching Keralam with a 3 day delay.

Globally, the AI and semiconductor led rally in technology stocks appeared to tire a bit this week with Broadcom tumbling 13% from the intra-week high post reporting disappointing set of result. Other tech stocks too witnessed some profit booking including in Asia. The uncertainty on the West Asia front continued with fresh strikes and retaliation keeping Brent crude oil elevated at \$95/barrel. Conflicting statements from both sides on the progress made on the peace deal also contributed to the volatility.

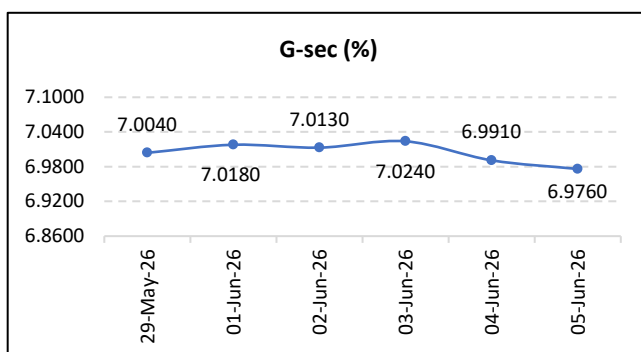
Next week, market will react to the 4QFY26 India GDP

growth data which came in stronger than expectations as well as the US May non-farm payrolls data. The progress of the monsoon will also be keenly tracked. The upcoming week will also see release of the May consumer inflation data across India, USA and China. The ECB will announce its monetary policy decision next week. Developments on the West Asia front will continue to be on the radar of investors. On the downside, the zone of 23100–23050 will act as a critical support area, as the 61.8% Fibonacci retracement of the previous rally from 22182 to 24602 is positioned within this range. A decisive breach below 23050 could trigger a sharper correction towards 22700, followed by 22500 in the short term. On the upside, the zone of 23550–23600 is expected to act as a crucial resistance hurdle. A sustained move above 23600 could pave the way for a sharp recovery towards 23900, followed by 24100 in the short term.

CNX Nifty



10 year Government of India Bond Yield



Indices	29-May	05-Jun	% Chg
Nifty	23,547.8	23,366.7	(0.8)
Sensex	74,775.7	74,243.3	(0.7)
Midcap	16,487.3	16,282.1	(1.2)
Small cap	6,770.3	6,784.9	0.2

Indices	29-May	05-Jun	% Chg
BSE Cons Durab	57,686.0	58,654.5	1.7
BSE Bankex	61,131.3	61,478.6	0.6
BSE Healthcare	46,806.4	46,908.4	0.2
BSE IT	28,165.1	28,221.2	0.2
BSE PSU	20,937.6	20,815.3	(0.6)
BSE Auto	57,983.4	57,632.9	(0.6)
BSE Oil	26,741.0	26,555.6	(0.7)
BSE Cap Goods	80,818.7	80,010.9	(1.0)
BSE Metal	43,765.8	43,212.5	(1.3)
BSE FMCG	18,264.7	17,926.8	(1.8)
BSE Realty	6,115.2	5,995.8	(2.0)
BSE Power	8,383.1	8,135.3	(3.0)

01 June - 05 June		
Rs in Cr	FII Inv	DII Inv*
Buy	1,60,951.8	72,089.4
Sell	2,04,183.8	47,289.9
Net	(43,232.1)	24,799.5

*Data till 04th June 2026

Top 5 Performers - Sensex			
	Close 29-05-2026	Close 05-06-2026	% Chg
Titan Company	4,074.7	4,260.0	4.5
Infosys	1,159.8	1,197.0	3.2
Eternal	250.9	256.5	2.2
InterGlobe Aviation	4,405.0	4,481.3	1.7
State Bank Of India	964.0	977.8	1.4

Top 5 Performers – Nifty			
	Close 29-05-2026	Close 05-06-2026	% Chg
Titan Company	4,074.9	4,260.2	4.5
Adani Enterprises	2,937.4	3,048.2	3.8
Infosys	1,160.9	1,197.5	3.2
Coal India	457.9	472.3	3.1
Eternal	250.6	256.5	2.4

Top 5 Losers – Sensex			
	Close 29-05-2026	Close 05-06-2026	% Chg
NTPC	386.8	361.7	-6.5
Ultratech Cement	11,449.3	10,910.8	-4.7
Bajaj Finserv	1,784.7	1,703.1	-4.6
Larsen & Toubro	4,076.7	3,954.0	-3.0
HCL Technologies	1,184.4	1,154.5	-2.5

Top 5 Losers – Nifty			
	Close 29-05-2026	Close 05-06-2026	% Chg
NTPC	386.9	361.7	-6.5
Ultratech Cement	11,482.0	10,912.0	-5.0
Bajaj Finserv	1,783.6	1,703.2	-4.5
Tata Consumer	1,178.4	1,130.9	-4.0
HDFC Life Insurance	594.8	575.3	-3.3

Source: BSE/NSE/Bloomberg/NSDL

Global Market Update

World Indices	Country	Last Price	Valuation - P/E (x)		% Change				
			CY26E	CY27E	1W	1M	3M	6M	12M
DJIA*	USA	51,561.9	22.2	19.8	1.0	3.3	8.5	7.5	21.8
Nasdaq*	USA	26,831.0	28.9	23.0	-0.5	3.8	19.8	13.8	39.0
S&P 500*	USA	7,584.3	22.4	19.4	0.1	3.0	12.5	10.4	27.7
Russell 2000*	USA	2,935.3	32.1	21.3	0.5	1.7	16.2	16.4	40.0
DAX*	Germany	24,945.0	16.0	13.9	-0.6	0.1	5.7	3.8	2.6
CAC*	France	8,244.3	15.0	13.9	0.7	-0.7	3.1	1.6	5.8
FTSE 100*	UK	10,360.3	13.1	12.2	-0.5	-0.8	0.7	7.2	17.6
STOXX Europe 600*	Europe	624.5	15.4	14.0	-0.2	0.2	4.3	7.9	13.1
Nikkei	Japan	66,588.1	24.0	24.0	0.4	11.9	19.7	31.9	77.3
Hang Seng	Hong Kong	24,962.0	11.3	10.0	-0.9	-4.8	-3.1	-4.3	4.4
Shanghai Composite	China	4,027.7	14.3	12.8	-1.0	-3.2	-2.3	3.2	19.0
KOSPI	Korea	8,160.6	9.7	7.5	-3.7	10.5	46.1	99.0	190.2
Straits Times	Singapore	5,050.0	15.8	14.6	0.2	2.5	4.2	11.4	28.9
SET	Thailand	1,582.6	16.2	15.5	0.9	4.3	12.2	24.2	38.7
S&P ASX 100	Australia	7,216.7	17.6	16.7	-1.2	-2.0	-2.3	0.5	0.6
Bovespa Brazil 50*	Brazil	1,70,330.6	8.5	7.9	-2.0	-9.2	-5.0	8.2	25.0

* Data till 04th June 2026

Global Commodity Update

World Commodities*	Unit	Last Price	% Change				
			1W	1M	3M	6M	12M
Brent Crude	\$/barrel	95.0	3.2	-6.2	2.5	49.1	45.4
Natural Gas Spot	\$/mmBtu	3.1	-7.8	12.4	-0.6	-40.7	7.7
Coal - Newcastle	\$/Ton	147.1	3.3	6.1	8.2	28.1	17.7
Copper LME	\$/Ton	13,920.5	2.4	4.5	8.6	19.6	41.6
Aluminium LME	\$/Ton	3,738.2	-0.8	4.6	7.0	30.3	51.3
Zinc LME	\$/Ton	3,565.5	1.3	5.3	9.0	9.3	34.5
Nickel LME	\$/Ton	18,465.9	-2.1	-2.8	6.9	25.2	20.4
Gold	\$/Troy Ounce	4,474.8	-1.4	-4.6	-13.5	6.6	33.5
Silver	\$/Troy Ounce	73.9	-1.9	-4.5	-12.6	26.6	107.2
Raw Sugar	\$/lb.	14.3	1.5	-3.6	1.2	-3.6	-13.9
Cotton	\$/lb.	78.5	-1.4	-7.4	14.0	16.3	14.1
Rubber	JPY/kg	415.0	1.6	4.8	15.3	29.7	37.7
Coffee Robusta	\$/lb.	3,352.0	-3.6	-7.9	-12.4	-22.0	-27.0
Palm Oil Malaysia Spot	\$/Ton	1,170.0	0.0	-2.5	2.9	11.4	20.0
Baltic Dry Index	points	3,037.0	-5.8	1.5	51.1	11.4	86.8

* Data till 04th June 2026

Source: Bloomberg

Major Currency Performance vs USD

Currency Pairs USD	Last Price*	% Change				
		1W	1M	3M	6M	12M
Dollar Index	99.2	0.3	0.8	-0.1	0.2	0.5
USD/INR	94.9	0.1	0.4	-3.5	-5.2	-9.6
USD/JPY	159.9	-0.4	-1.3	-1.5	-2.9	-10.2
USD/EUR	0.9	0.1	0.4	-0.3	0.0	-1.7
USD/GBP	0.7	-0.2	0.4	-0.9	-1.1	0.7
USD/CNY	6.8	0.0	0.9	2.1	4.5	6.1

*Live Price on 5th June'26 at 4:00 pm

Major Currency Performance vs INR

Currency Pairs INR	Last Price*	% Change				
		1W	1M	3M	6M	12M
USD/INR	94.9	0.1	0.4	-3.5	-5.2	-9.6
JPY/INR	0.6	0.4	1.7	-2.0	-2.3	0.9
EUR/INR	110.5	0.1	0.8	-3.7	-5.1	-11.3
GBP/INR	127.8	-0.3	1.0	-4.3	-6.0	-9.0
CNY/INR	14.0	0.1	-0.5	-5.5	-9.3	-14.8

*Live Price on 5th June'26 at 4:00 pm

Source: Bloomberg



Corporate News



CG Power and Industrial Solutions: The company commissioned the Extra High-Voltage (EHV) Switchgear Manufacturing facility S3 Unit-II in Nashik on 4th June. S3 Unit-2 has a capacity to manufacture 7,200 units (annually) of EHV circuit breakers in the 33kV to 245kV range including 500kV and 350kV high-voltage testing laboratories. The facility is spread across ~35 acres of land, with a built-up area of around 72,000 sq. meters. This expands the company's total EHV switchgear capacity by 80%.

Zee Entertainment: The company announced that it has been awarded the rights to broadcast, stream and distribute a wide portfolio of 39 FIFA competitions in India from 2026 to 2034, including the FIFA World Cup 2026, the FIFA Women's World Cup 2027 and the FIFA World Cup 2030. Zee will deliver coverage across its linear television channels (UNITE8 Sports) and digital platform (Zee 5), in multiple languages, for 39 FIFA events across this period, spanning men's, women's and youth competitions. The consideration under the Agreement is in the nature of a multi-tournament and multi-year rights fee payable over the contract period, specific financial terms have not been disclosed.



Hero Moto Corp: The company unveiled its first Flex Fuel vehicles - the Splendor+ and HF Deluxe. These motorcycles will be available in the 100cc segment and will be fully compatible with ethanol-blended fuels ranging from E20 to E85. The HF Deluxe Flex Fuel will be priced at Rs 72,792 (Ex-showroom Delhi), while the Splendor+ Flex Fuel will be priced at Rs 82,710 (Ex-showroom Delhi). The Flex Fuel portfolio will be introduced in Delhi and select regions of Maharashtra in July 2026, followed by nationwide rollout.

Maruti Suzuki India: The company launched India's first flex-fuel car under the WagonR brand. The car comes with advanced ECU calibration capable of seamlessly adapting to any ethanol blend between E20 to E100.



Wipro: The company announced that it has acquired an additional 20% stake in Aggne Global Inc., for a sum of USD 28.5 mn. Aggne Group is a fast-growing Insurtech company offering a wide range of AI, and Intellectual Property driven services designed to help insurers transform operations, drive new efficiencies, and deliver optimal customer experiences. This takes Wipro's shareholding in Aggne Global to 80%. This transaction was completed on 1st June.

Indigo: The company announced that it has temporarily suspended operations to six international destinations as part of network optimization and it retains 1,800+ weekly international flights despite adjustments. The company added that this decision was taken on account of a traditionally softer demand in the upcoming quarter and an incredibly challenging cost environment. The bookings for all the impacted services will resume starting 1st Oct'26.





Anant Raj: The company signed an MOU with the Government of Haryana, on 1st Jun'26. Anant Raj will invest ~Rs 25,000 cr, for development of Data Center and Cloud Services in the state of Haryana.

Concord Biotech: The company received an approval from the U.S. Food and Drug Administration (USFDA) for its ANDA for Mycophenolate Mofetil for Oral Suspension USP, 200 mg/mL. This is used to prevent the body from rejecting transplanted organs (kidney, heart, or liver) and to manage severe autoimmune diseases like lupus nephritis and rheumatoid arthritis. The U.S. market for this product is ~USD 30 mn.

CONCORD BIOTECH
Biotech for Mankind...

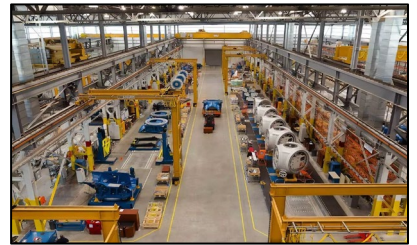


Domestic & Global Economic Update



RBI MPC maintains status quo while increasing inflation forecast: In its second meeting of FY27, the RBI's Monetary Policy Committee (MPC) left the repo rate unchanged at 5.25%, which was last cut in Dec'25 from 5.5% to 5.25%. Further, the RBI revised the FY27 real GDP growth projection downward to 6.6 % from earlier projection of 6.9% and increased the retail inflation projection to 5.1% from 4.6% for FY27.

India Industrial Production (IIP): India's Industrial production grew 4.9% in Apr'26, lower than the 5.7% growth in Apr'25. Capital goods output emerged as the strongest-performing segment of India's industrial sector in Apr'26, registering a robust 16% growth. Infrastructure and Construction Goods output rose 7.1% in Apr'26 from 6.4% in Apr'25. In contrast, primary goods output growth slowed sharply to 0.8% in Apr'26 from 3.3% in Apr'25. This was the 1st IIP data released under the newly revamped IIP series with base year updated to 2022-23 and expanded coverage to 463 item groups to better reflect structural shifts in the economy



Cabinet decision to replace Old Trucks and Buses in Delhi NCR: On 3rd June, the cabinet approved a Rs 9,585 cr scheme aimed at replacing over 2 lakh old trucks and buses in the Delhi-NCR with cleaner BS-VI models and electric vehicles (EVs) over the next 2 years. The programme seeks to incentivise owners of BS-IV and older commercial vehicles (CVs) to switch to BS-VI-compliant vehicles or EVs.



Order Inflows during the week

Date	Company	Mcap (Rs cr)	Order Size (Rs cr)	Client	Execution span
03-06-2026	Bharat Heavy Electrical	1,34,756	2,000 to 2,500	Dangote Petroleum Refinery & Petrochemicals (Nigeria)	26 Months
05-06-2026	Bharat Heavy Electrical	1,34,756	21,000	Meja Urja Nigam Private Ltd. (MUNPL)	70 Months
01-06-2026	Kalpataru Projects International	21,995	2,002	Multiple orders	-
03-06-2026	Atlanta Electricals	15,720	285.2	Punjab State Transmission Corporation	-
02-06-2026	Paras Defence and Space Technologies	7,742	52.8	Bharat Electronics Ltd	Sept'27
02-06-2026	John Cockerill India	4,524	1,250 - 1,300	JSW Vijaynagar Metallics	36 Months
30-05-2026	Concord Control Systems	3,110	279.9	Indian Railways	12 Months
03-06-2026	Bajel Projects	2,337	300 - 400	Data Center Client (Mumbai)	24 Months
30-05-2026	Ceinsys Tech	1,986	4.7	Emotiv Mobility LLC, USA	4 Months
02-06-2026	SBC Exports	1,769	18.0	HUXXE Readymade Garments Trading LLC	1 Year
02-06-2026	Magellanic Cloud	1,480	9.7	East Coast Railways	6 Months
02-06-2026	Magellanic Cloud	1,480	4.3	South Western Railway	6 Months
04-06-2026	Shree Refrigerations	1,081	2.5	Mazagon Dock Shipbuilders	Jun'27

Source: BSE



Macro Economic Event Calendar

Country	Macro Economic Event Calendar	Previous	Forecast
08th June 2026			
JPY	1QCY26 GDP Growth Rate YoY	2.1%	2.1%
09th June 2026			
USA	Apr'26 Balance of Trade (USD Bn)	-60.3	-57.9
USA	May'26 Exisiting Home Sales (Mn Homes)	4.0	3.9
CNY	May'26 Balance of Trade (USD Bn)	84.8	89.0
10th June 2026			
USA	May'26 Core CPI MoM	0.4%	0.3%
USA	May'26 CPI MoM	0.6%	0.4%
CNY	May'26 CPI YoY	1.2%	1.4%
CNY	May'26 PPI YoY	2.8%	3.1%
11th June 2026			
USA	May'26 PPI MoM	1.4%	0.3%
USA	May'26 Core PPI MoM	1.0%	0.2%
USA	Weekly Initial Jobless Claims	225K	219K
EUR	ECB Interest Rate Decision	2.2%	2.4%
12th June 2026			
IND	May'26 CPI YoY	3.5%	4.0%

Country / Organisation	
IND	India
USA	United States of America
CNY	China
GBP	United Kingdom
EUR	European Union
JPY	Japan

Source: Bloomberg



Insider trades during the week

Company Name	CMP* (Rs)	Mcap (Rs cr)	Net Buy/Sell	Net Quantity	Net Value (Rs cr)	Net % Traded	Latest Promoter holding
Coal India Ltd	473	2,91,682	Sell	36,98,38,698	16,647.0	0.06	63.1%
Paisalo Digital Ltd	57	5,202	Buy	2,01,50,000	108.6	0.02	41.7%
Ravindra Energy Ltd	128	2,285	Sell	44,00,000	52.3	0.02	63.7%
Go Fashion (India) Ltd	413	2,232	Buy	6,54,259	23.6	0.01	54.2%
KDDL Ltd	2,890	3,554	Sell	70,978	19.7	0.01	50.4%
NIIT Ltd	93	1,271	Buy	20,67,000	17.0	0.02	37.0%
Acutaas Chemicals Ltd	3,329	27,255	Sell	39,881	12.3	0.00	32.7%
Prataap Snacks Ltd	1,138	2,722	Buy	1,01,914	12.0	0.00	55.6%
Remsons Industries Ltd	84	294	Sell	10,00,000	9.2	0.03	65.5%
Avenue Supermarts Ltd	4,147	2,70,478	Sell	20,000	8.2	0.00	74.5%
Ajmera Realty & Infra India Ltd	122	2,398	Buy	6,41,000	7.4	0.00	68.2%
Jaro Institute of Technology Management and Research Ltd	576	1,278	Buy	93,445	5.5	0.00	57.3%
Ganesh Consumer Products Ltd	208	842	Buy	2,39,900	5.0	0.01	64.1%
Info Edge (India) Ltd	994	64,476	Sell	42,709	4.2	0.00	37.5%
Gem Aromatics Ltd	157	821	Buy	2,28,760	3.4	0.00	57.0%
NCC Ltd	146	9,179	Buy	2,17,236	3.2	0.00	22.8%
Landmark Cars Ltd	416	1,726	Buy	68,600	2.6	0.00	49.8%
Premier Polyfilm Ltd	55	576	Buy	4,11,275	2.2	0.00	69.4%
Paradeep Phosphates Ltd	127	13,232	Buy	1,60,000	2.0	0.00	57.8%
NIIT Learning Systems Ltd	228	3,142	Buy	80,000	1.8	0.00	34.1%
Lakshmi Mills Company Ltd	7,500	522	Buy	2,400	1.8	0.00	65.6%
Euro Pratik Sales Ltd	256	2,616	Buy	63,815	1.6	0.00	70.5%
Alembic Pharmaceuticals Ltd	737	14,490	Buy	20,000	1.5	0.00	69.7%
Aurum PropTech Ltd	189	1,358	Buy	80,000	1.5	0.00	47.4%
Mach Travel Solutions Ltd	138	291	Buy	84,600	1.3	0.00	72.9%
Shaily Engineering Plastics Ltd	3,072	14,129	Buy	4,455	1.3	0.00	43.4%
Knowledge Marine & Engineering Works Ltd	1,850	4,523	Buy	7,079	1.3	0.00	53.6%
Navigant Corporate Advisors Ltd	81	25	Sell	1,30,000	1.1	0.04	40.2%
La Opala RG Ltd	175	1,945	Buy	60,000	1.0	0.00	66.2%
Sterlite Technologies Ltd	619	30,235	Sell	15,000	0.9	0.00	44.4%
STEL Holdings Ltd	498	919	Buy	17,268	0.8	0.00	71.7%
Cupid Breweries And Distilleries Ltd	25	232	Sell	2,69,876	0.7	0.00	54.0%
Sinclairs Hotels Ltd	75	383	Buy	85,228	0.6	0.00	63.6%
Nirlon Ltd	617	5,560	Sell	10,000	0.6	0.00	67.7%
KCP Ltd	160	2,061	Buy	35,000	0.6	0.00	44.3%
Shyam Metalics and Energy Ltd	1,003	27,991	Sell	5,900	0.6	0.00	74.6%

*Current market price as on 05th June'26

Source: Stock Exchange filings, SSL Research

Kindly note: Data pertains to exchange filings under Promoters, Promoter group and Immediate relative categories.

Company Name	CMP* (Rs)	Mcap (Rs cr)	Net Buy/Sell	Net Quantity	Net Value (Rs cr)	Net % Traded	Latest Promoter holding
Unicommerce Esolutions Ltd	87	973	Sell	60,000	0.5	0.00	36.0%
NGL Fine Chem Ltd	2,745	1,696	Sell	1,722	0.5	0.00	72.7%
Vascon Engineers Ltd	32	741	Sell	1,28,578	0.4	0.00	30.4%
Parshva Enterprises Ltd	157	160	Buy	25,920	0.4	0.00	74.6%
Mangalam Global Enterprise Ltd	16	511	Buy	2,72,622	0.4	0.00	72.4%
Avax Apparels and Ornaments Ltd	52	43	Buy	80,000	0.4	0.01	52.0%
Cosmic CRF Ltd	1,085	999	Buy	3,700	0.4	0.00	55.1%
KPIT Technologies Ltd	777	21,295	Sell	4,999	0.4	0.00	39.4%
AK Capital Services Ltd	1,695	1,119	Buy	2,294	0.4	0.00	72.2%
Gujjubhai Industries Ltd	139	291	Buy	26,011	0.4	0.00	27.7%
HCL Technologies Ltd	1,150	3,12,180	Sell	2,611	0.3	0.00	60.9%
Olatech Solutions Ltd	102	45	Sell	25,900	0.3	0.01	62.7%
Motor & General Finance Ltd	28	108	Buy	96,780	0.3	0.00	69.6%
Haldyn Glass Ltd	110	589	Buy	22,084	0.3	0.00	59.0%
Monotype India Ltd	0	29	Sell	60,00,000	0.2	0.01	13.9%
Torrent Pharmaceuticals Ltd	4,444	1,50,419	Buy	600	0.2	0.00	68.3%
Gland Pharma Ltd	2,277	37,561	Sell	1,000	0.2	0.00	51.8%
Trident Lifeline Ltd	243	290	Buy	9,000	0.2	0.00	62.9%
Centum Electronics Ltd	3,490	5,151	Sell	1,000	0.2	0.00	46.9%
Afcons Infrastructure Ltd	318	11,696	Sell	6,700	0.2	0.00	50.2%
Jash Engineering Ltd	438	2,767	Sell	4,900	0.2	0.00	43.2%
Zyodus Wellness Ltd	499	15,878	Buy	4,000	0.2	0.00	69.6%
HealthCare Global Enterprises Ltd	638	9,520	Sell	3,000	0.2	0.00	64.2%
NCL Industries Ltd	181	820	Buy	10,000	0.2	0.00	41.6%
Mrs. Bectors Food Specialities Ltd	173	5,316	Buy	10,000	0.2	0.00	49.0%
Senco Gold Ltd	351	5,745	Sell	5,000	0.2	0.00	64.5%
CFF Fluid Control Ltd	739	1,551	Buy	2,400	0.2	0.00	68.1%
Kirloskar Oil Engines Ltd	1,917	27,868	Buy	900	0.2	0.00	41.1%
Ganon Products Ltd	15	14	Sell	1,00,000	0.2	0.01	12.2%
Gamco Ltd	42	224	Buy	37,085	0.2	0.00	71.3%
Indo City Infotech Ltd	13	13	Buy	1,37,000	0.1	0.01	62.0%
Promact Plastics Ltd	9	6	Buy	1,68,949	0.1	0.03	39.4%
Patel Integrated Logistics Ltd	14	95	Buy	66,000	0.1	0.00	36.0%
Dolphin Rubbers Ltd	170	171	Buy	2,995	0.1	0.00	37.5%
Bhartiya International Ltd	720	966	Buy	534	0.0	0.00	61.2%
Harshdeep Hortico Ltd	83	133	Buy	4,500	0.0	0.00	73.0%
Damodar Industries Ltd	31	73	Sell	4,111	0.0	0.00	70.2%
Crestchem Ltd	147	44	Buy	790	0.0	0.00	30.0%
Alfa Transformers Ltd	50	45	Buy	1,000	0.0	0.00	46.8%
Hilltone Software and Gases Ltd	48	63	Buy	1,000	0.0	0.00	10.7%
Ugar Sugar Works Ltd	42	470	Buy	10	0.0	0.00	44.5%
Linc Ltd	99	591	Sell	0	0.0	0.00	61.0%
Daikaffil Chemicals India Ltd	39	23	Buy	4,200	0.0	0.00	52.7%
Sodhani Academy of Fintech Enablers Ltd	170	97	Buy	500	0.0	0.00	73.6%

*Current market price as on 05th June'26

Source: Stock Exchange filings, SSL Research

Kindly note: Data pertains to exchange filings under Promoters, Promoter group and Immediate relative categories.



Key Bulk and Block Deals

(For companies above Rs 1,000 cr Market Cap)

NSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/Sell	Price (Rs)	Quantity Traded	% Traded
01-06-2026	RAVINDRA ENERGY	KHANDEPAR INVESTMENTS PVT LTD	SELL	118.9	22,00,000	1.2%
02-06-2026	ALKEM LABORATORIES	JAYANTI SINHA	SELL	5,200.0	12,38,200	1.0%
02-06-2026	BAJAJ ELECTRICALS	JAMNALAL SONS PVT LTD	SELL	320.5	56,16,000	4.9%
03-06-2026	GMR AIRPORTS	FMRC FIDELITY ADVISOR INTERNATIONAL CAPITAL APPRECIATION FUND	BUY	97.8	14,92,50,100	1.4%
03-06-2026	GMR AIRPORTS	GOLDMAN SACHS TRUST II-GOLDMAN SACHS GQG PARTNERS INTL OPPORTUNITIES FUND	SELL	97.8	16,27,45,207	1.5%
03-06-2026	LENSKART SOLUTIONS	SVF II LIGHTBULB (CAYMAN) LTD	SELL	508.6	5,65,00,000	3.3%
04-06-2026	AQYLON NEXUS	KURJIBHAI PREMJBHAI RUPARELIYA	SELL	56.2	37,58,170	1.5%

NSE Block Deals

Date of Deal	Company Name	Client Name	Buy/Sell	Price (Rs)	Quantity Traded	% Traded
02-06-2026	ALKEM LABORATORIES	JAYANTI SINHA	SELL	5,200.0	12,38,200	1.0%
02-06-2026	BAJAJ ELECTRICALS	JAMNALAL SONS PVT LTD	SELL	320.5	56,16,000	4.9%
03-06-2026	GMR AIRPORTS	FIDELITY INVESTMENT TRUST FIDELITY INTERNATIONAL SMALL CAP FUND	BUY	97.8	19,50,00,000	1.9%
03-06-2026	GMR AIRPORTS	GQG PARTNERS EMERGING MARKETS EQUITY FUND	SELL	97.8	19,50,00,000	1.9%
03-06-2026	LENSKART SOLUTIONS	SVF II LIGHTBULB (CAYMAN) LTD	SELL	508.6	5,65,00,000	3.3%

BSE Bulk Deals

Date of Deal	Company Name	Client Name	Buy/Sell	Price (Rs)	Quantity Traded	% Traded
02-06-2026	NEOGEN CHEMICALS	AXIS MUTUAL FUND	SELL	1,778.0	2,66,000	1.0%

BSE Block Deals

Date of Deal	Company Name	Client Name	Buy/Sell	Price (Rs)	Quantity Traded	% Traded
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: Stock Exchange filings, SSL Research | Above list consists of only key bulk & block deals and is not exhaustive.



Technical Desk

Nifty Chart



Nifty Awaits a Directional Trigger

For the second consecutive week, the benchmark index Nifty ended in negative territory. On the weekly chart, the index formed a bearish candle with shadows on both sides, reflecting indecisiveness among market participants. Notably, over the last four trading sessions, the index has been hovering near its previous swing low, indicating a lack of directional conviction. Yet, beneath this seemingly quiet price action, a fascinating battle between bullish and bearish signals continues to unfold.

Interestingly, Nifty formed a Bullish Belt Hold pattern on Tuesday, followed by a Gravestone Doji on Wednesday. However, the absence of any meaningful follow-through move during Thursday and Friday suggests that traders remain cautious. As a result, the index has largely traded within a narrow range over the past four sessions. The bigger question, however, is why the index remains trapped despite these contrasting candlestick formations.

A key reason behind this sideways movement is the divergence between the index's heavyweight sectors. While Nifty Bank has been showing relative strength, Nifty IT has continued to underperform, resulting in a tug-of-war that has kept the benchmark range-bound. Additionally, Nifty continues to trade below its crucial moving averages, while momentum indicators are also signaling a lack of strong directional bias. When heavyweight sectors pull in opposite directions, the next move often becomes more explosive once the stalemate is broken.

These technical factors suggest that the index is likely to remain in a consolidation phase in the near term. On the downside, the zone of 23100–23050 will act as a critical support area, as the 61.8% Fibonacci retracement of the previous rally from 22182 to 24602 is positioned within this range. A decisive breach below 23050 could trigger a sharper correction towards 22700, followed by 22500 in the short term. Equally important is the resistance zone, as it could determine whether the current consolidation transforms into a meaningful recovery.

On the upside, the zone of 23550–23600 is expected to act as a crucial resistance hurdle. A sustained move above 23600 could pave the way for a sharp recovery towards 23900, followed by 24100 in the short term.



Corporate Action

Dividend

Company Name	Ex-Date	Div %	DPS (Rs)	FV (Rs)	CMP (Rs)	Type	Div. Yield (%)
Unified Data- Tech Solutions Ltd.	08-Jun-26	55.0	5.5	10.0	408	Interim	1.3
Inox India Ltd.	09-Jun-26	100.0	2.0	2.0	1,506	Final	0.1
Nelco Ltd.	09-Jun-26	10.0	1.0	10.0	698	Final	0.1
Indian Bank	10-Jun-26	182.5	18.3	10.0	837	Final	2.2
Infosys Ltd.	10-Jun-26	500.0	25.0	5.0	1,201	Final	2.1
Seshasayee Paper and Boards Ltd.	10-Jun-26	100.0	2.0	2.0	227	Final	0.9
Tata Chemicals Ltd.	10-Jun-26	110.0	11.0	10.0	721	Final	1.5
Tata Elxsi Ltd.	10-Jun-26	750.0	75.0	10.0	4,294	Final	1.7
Tata Investment Corporation Ltd.	10-Jun-26	340.0	3.4	1.0	667	Final	0.5
Sunshield Chemicals Ltd.	11-Jun-26	30.0	3.0	10.0	1,095	Final	0.3
ACC Ltd.	12-Jun-26	75.0	7.5	10.0	1,351	Final	0.6
Adani Enterprises Ltd.	12-Jun-26	130.0	1.3	1.0	2,973	Final	0.0
Adani Ports and Special Economic Zone Ltd.	12-Jun-26	375.0	7.5	2.0	1,791	Final	0.4
Adani Total Gas Ltd.	12-Jun-26	25.0	0.3	1.0	744	Final	0.0
Ambuja Cements Ltd.	12-Jun-26	100.0	2.0	2.0	426	Final	0.5
Apcotex Industries Ltd.	12-Jun-26	275.0	5.5	2.0	540	Final	1.0
Avantel Ltd.	12-Jun-26	10.0	0.2	2.0	176	Final	0.1
Canara Bank	12-Jun-26	210.0	4.2	2.0	133	Final	3.2
Cemindia Projects Ltd.	12-Jun-26	300.0	3.0	1.0	1,127	Final	0.3
Eimco Elecon (India) Ltd.	12-Jun-26	40.0	4.0	10.0	1,536	Final	0.3
Elecon Engineering Company Ltd.	12-Jun-26	150.0	1.5	1.0	507	Final	0.3
High Energy Batteries (India) Ltd.	12-Jun-26	150.0	3.0	2.0	491	Final	0.6
ICICI Prudential Asset Management Company Ltd.	12-Jun-26	1,240.0	12.4	1.0	3,311	Final	0.4
JM Financial Ltd.	12-Jun-26	175.0	1.8	1.0	121	Final	1.4
Lloyds Metals & Energy Ltd.	12-Jun-26	100.0	1.0	1.0	1,780	Final	0.1
MM Forgings Ltd.	12-Jun-26	40.0	4.0	10.0	453	Interim	0.9
Navin Fluorine International Ltd.	12-Jun-26	430.0	8.6	2.0	7,092	Final	0.1
Orient Cement Ltd.	12-Jun-26	50.0	0.5	1.0	135	Final	0.4
Oseaspre Consultants Ltd.	12-Jun-26	870.0	87.0	10.0	-	Final	-
Panchsheel Organics Ltd.	12-Jun-26	8.0	0.8	10.0	124	Final	0.6
Petronet LNG Ltd.	12-Jun-26	30.0	3.0	10.0	269	Final	1.1
Piramal Finance Ltd.	12-Jun-26	550.0	11.0	2.0	1,964	Final	0.6
Punjab National Bank	12-Jun-26	150.0	3.0	2.0	106	Final	2.8
Reliance Industrial Infrastructure Ltd.	12-Jun-26	35.0	3.5	10.0	756	Final	0.5
Tata Motors Ltd.	12-Jun-26	200.0	4.0	2.0	374	Final	1.1
Tata Steel Ltd.	12-Jun-26	400.0	4.0	1.0	211	Final	1.9
Technojet Consultants Ltd.	12-Jun-26	870.0	87.0	10.0	100	Final	87.4
Trent Ltd.	12-Jun-26	600.0	6.0	1.0	2,837	Final	0.2
Voltas Ltd.	12-Jun-26	400.0	4.0	1.0	1,286	Final	0.3
SMC Global Securities Ltd	15-Jun-26	30.0	0.6	2.0	59	Final	1.0

Open Offer

Company Name	Start Date	Close Date	Offer Price (Rs)	Acquisition (No. of Shares)	CMP (Rs)	Last Traded Date
Midland Polymers Ltd.	25-May-26	08-Jun-26	10.0	97,50,000	23.9	03-Mar-15
Shantai Industries Ltd.	26-May-26	09-Jun-26	21.0	19,20,000	99.0	01-Jun-26
Sharp India Ltd.	08-Jun-26	19-Jun-26	10.0	64,86,000	113.2	01-Jun-26
Jindal Leasefin Ltd.	12-Jun-26	25-Jun-26	18.0	7,82,314	80.6	01-Jun-26
TMT (India) Ltd.	12-Jun-26	25-Jun-26	10.0	12,87,988	7.7	18-May-26
SJ Corporation Ltd.	17-Jun-26	01-Jul-26	12.0	1,12,72,300	78.8	18-May-26
Fabino Enterprises Ltd.	22-Jun-26	06-Jul-26	20.0	5,46,000	20.3	27-Apr-26

Stock Split

Company Name	Ex-date/ Record Date	FV Before Split (Rs)	FV After Split (Rs)	Comment
Mobavenue AI Tech Ltd.	12-Jun-26	10.0	2.0	-

Bonus

Company Name	Ex/Record Date	Ratio
Gautam Exim Ltd	10-Jun-26	3:1 (3 Bonus shares for every 1 share held)
City Union Bank Ltd.	12-Jun-26	1:3 (1 Bonus share for every 3 shares held)

Rights issue

Company Name	Ex/Record Date	Ratio	Offer Price (Rs.)	FV (Rs)	CMP (Rs)	Last Traded Date
Consecutive Commodities Ltd.	08-Jun-26	3:1	1.0	1.0	1.1	04-Jun-26
Ravindra Energy Ltd.	08-Jun-26	1:9	101.0	10.0	138.9	04-Jun-26

Buyback offer - Upcoming

Company Name	Record date	Face Value (Rs)	Market Type	CMP (Rs)	Buyback Price (Rs)	Buyback Amount (Rs Cr)
N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Upcoming Board Meetings & Agenda

Company Name	Board Meeting Date	Agenda
ASM Technologies Ltd.	06-Jun-26	Fund Raising
Ganesh Infraworld Ltd.	06-Jun-26	Fund Raising
Gujarat Themis Biosyn Ltd.	06-Jun-26	Fund Raising
IBL Finance Ltd.	06-Jun-26	Fund Raising
North Eastern Carrying Corporation Ltd.	06-Jun-26	Issue of preference share against conversion of loan
Panth Infinity Ltd.	06-Jun-26	Fund Raising
Steelco Gujarat Ltd.	06-Jun-26	Rights Issue
Amalgamated Electricity Company Ltd.	08-Jun-26	Fund Raising
AYE Finance Ltd.	08-Jun-26	Fund Raising
Can Fin Homes Ltd.	08-Jun-26	Fund Raising
Oneclick Logistics India Ltd.	08-Jun-26	Fund Raising
Parmax Pharma Ltd.	08-Jun-26	Fund raising
Pro Fin Capital Services Ltd.	08-Jun-26	Fund raising
Sumeet Industries Ltd.	08-Jun-26	Rights Issue
Suryoday Small Finance Bank Ltd.	25-Jun-26	Fund raising

Company Name Change

Date of Announcement	Old Name	New Name
N.A.	N.A.	N.A.

Source: ACE Equity, Exchange Fillings

SBICAP Securities Limited

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