



Market Updates

Asian Market	Close	Abs. Change	Per. Change
HANG-SENG	25,120.0	(136.0)	(0.5)
NIKKEI 225	66,431.0	(1,030.0)	(1.5)
STRAIT TIMES	5,066.0	(0.5)	(0.0)
Global Bellwethers	Close	Abs. Change	Per. Change
DOW JONES 30	51,562.0	875.0	1.7
NASDAQ	30,408.0	(163.0)	(0.5)
FTSE UK	10,360.0	28.0	0.3
Indian Benchmark	Close	Abs. Change	Per. Change
NIFTY 50	23,417.0	11.0	0.1
NIFTY 200	13,550.0	21.0	0.2
NIFTY 500	22,498.0	46.0	0.2
Indian Bro ader Markets	Close	Abs. Change	Per. Change
NIFTY MIDCAP 100	60,967.0	279.0	0.20
NIFTY SMLCAP 100	18,121.0	89.0	0.3
NSE Sector Indices	Close	Abs. Change	Per. Change
NIFTY BANK	54,308.0	122.0	0.2
NIFTY FINANCIAL SERRVICES	25,031.0	76.0	0.3
NIFTY IT	29,301.0	(84.0)	(0.3)
NIFTY ENERGY	40,446.0	249.0	0.6
NIFTY FMCG	48,216.0	92.0	0.2
NIFTY AUTO	26,144.0	52.0	0.2
NIFTY METAL	13,436.0	(99.0)	(0.7)
NIFTY CONSUMPTION	11,186.0	51.0	0.5
NIFTY PHARMA	24,178.0	91.0	0.4
NIFTYINFRA	9,209.0	(10.0)	(0.1)
NIFTY REALTY	765.0	2.0	0.3
NIFTY MEDIA	1,452.0	31.0	2.2
NIFTY MNC	31,696.0	58.0	0.2

Fund Flow

Participants in INR Cr	Latest	MTD Calendar	YTD (CY)
FIIIs	(4,447)	(22,338)	(3,19,051)
DIIIs	4,360	24,799	4,09,136

Source: BS = Business Standard, Tol: Times of India, MC = Money Control, B = Bloomberg

Stocks in News

- **TITAN COMPANY:** The Company gives its retail outlook 8–9% market CAGR through FY30.
- **WOCKHARDT:** The company outlines a two-year strategy focused on growth acceleration, operational excellence, and AI enablement. It plans to launch Zaynich across key global markets, expand the reach of Miqnaf, and strengthen its Emrok franchise.
- **PREMIER ENERGIES:** The company is recognised as a Grade A manufacturer in Wood Mackenzie's Global Solar PV Module Manufacturer Rankings 2026.
- **RAJESH EXPORT:** The company clarifies that no penalty has been imposed by SEBI and states that reported financials are accurate. It attributes the discrepancy flagged by SEBI to misinterpretation of EBITDA versus revenue and says it is engaging with the regulator to resolve the issue.
- **JUNIPER HOTELS:** The company signs an agreement to acquire 100% stake in Juniper Hospitality Assets and plans to develop a five-star hotel in New Delhi on a 2.52-acre land parcel.
- **TATA TECHNOLOGIES:** The company launches the fourth edition of its Inno-Vent hackathon, in collaboration with Emerson and Amazon Web Services, focused on AI at the edge.
- **ICICI BANK:** The company receives a warning letter from SEBI related to an FPI fund repatriation issue but states there is no material impact on operations or financials.
- **PREMIER ENERGIES:** The company is executing a Rs. 12,500 crore capex programme in solar manufacturing and diversifying into adjacent clean-energy segments including batteries.
- **FDC:** Maharashtra FDA officials inspect company depots at Nagpur and Chhatrapati Sambhaji Nagar, seize stock of 'Enerzal'; the company plans legal recourse

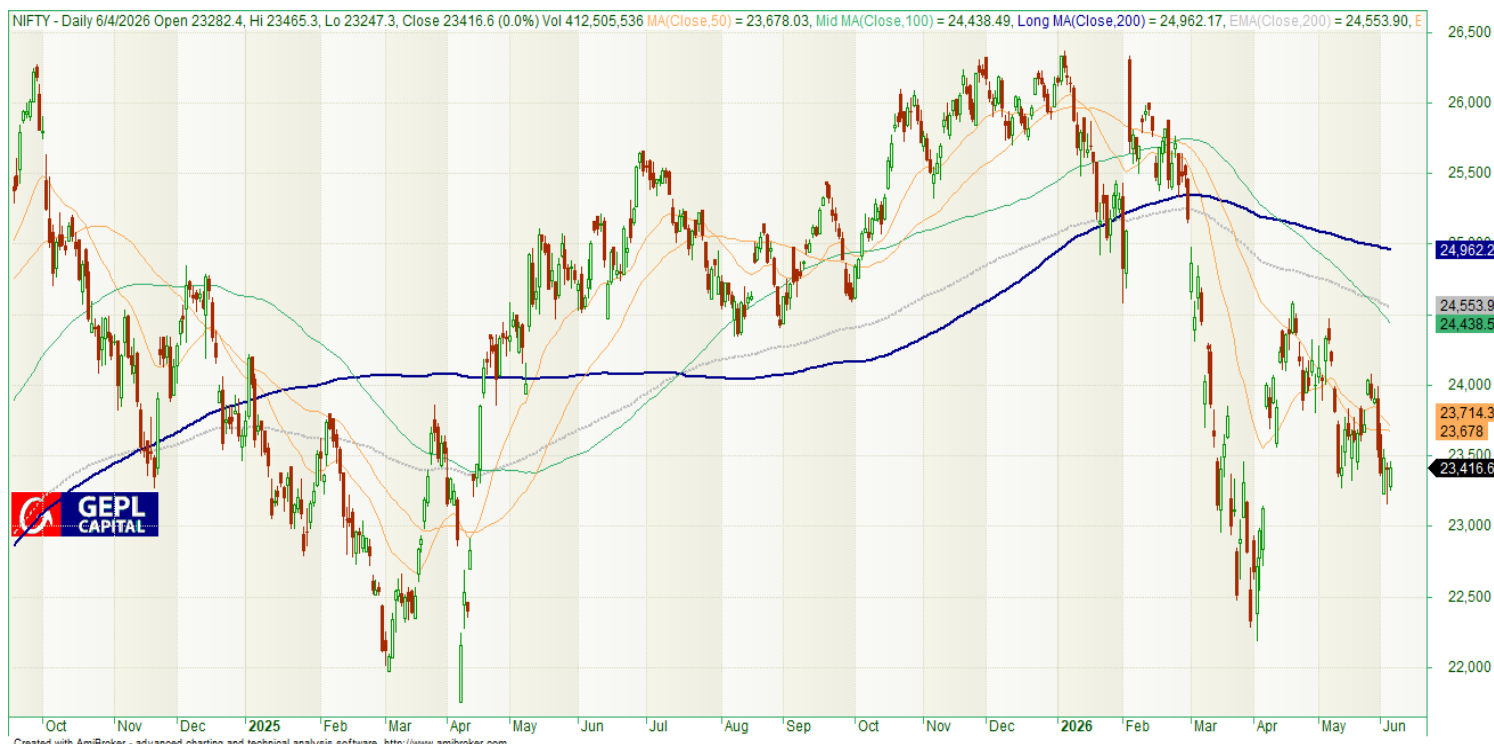
Economic News

- **FPI Exodus Hits Financials Hardest as Foreign Investors Trim India Exposure:** FPIs sold Indian equities worth ₹2.25 lakh crore during Jan–May 2026, with financial services bearing the brunt of outflows at nearly ₹1.15 lakh crore, driven by profit-booking and high foreign ownership. IT and FMCG followed with outflows of ₹26,800 crore and ₹21,600 crore, respectively, amid valuation concerns, growth pressures, and capital shifting toward global AI opportunities. Other sectors such as consumer services, autos, healthcare, telecom, and oil & gas also saw significant selling, though capital goods, metals, mining, and power continued to attract foreign investor interest. Outflows peaked in March to April before easing in May.

Global News

- **US Jobless Claims Hit 4-Month High, Labor Market Remains Resilient:** U.S. initial jobless claims rose by 13,000 to 225,000 in the week ended May 30, the highest level in four months, mainly due to Memorial Day-related volatility. Despite the increase, labor market conditions remain stable, with continuing claims falling to 1.78 million and layoffs staying historically low. Productivity growth for Q1 was revised down to 0.3%, while unit labor costs increased a modest 1.8%, reinforcing expectations that AI-driven efficiency gains could help contain labor costs. With unemployment expected to remain at 4.3% and payroll growth moderating, the Federal Reserve is likely to keep interest rates unchanged while monitoring inflation trends.

Technical Snapshot



Name	Previous Close	Reversal	Support 2	Support 1	Pivot Point	Resistance 1	Resistance 2	Trend
NIFTY	23416.55	23632.65	23158.38	23287.47	23376.38	23505.47	23594.38	BEAR
BANKNIFTY	54307.85	54461.00	53567.82	53937.84	54199.42	54569.44	54831.02	BEAR
NIFTY MIDCAP 150	22315.95	22492.55	21979.58	22147.77	22282.33	22450.52	22585.08	BEAR
NIFTY SMLCAP 250	17052.70	17112.45	16792.27	16922.48	17017.47	17147.68	17242.67	BEAR

Key Highlights:

<p>NIFTY SPOT: 23416.55 (0.05%)</p> <p>TRADING ZONE: Resistance: : 23600 (Pivot Level) and 23800 (Key Resistance). Support: 23360 (Pivot Level) and 23150 (Key Support).</p> <p>BROADER MARKET: OUTPERFORMED MIDCAP 150: 19694.15 (0.25%), SMALLCAP 250: 26144.35 (0.2%)</p> <p>VIEW: Bearish Till Below 23800 (Key Resistance)</p>	<p>BANKNIFTY SPOT: 54307.85 (0.22%)</p> <p>TRADING ZONE: Resistance:54500 (Pivot Level) and 55000 (Key Resistance) Support: :53000 (Pivot Level) and 52500 (Key Support).</p> <p>VIEW: Bearish Till Below 55000 (Key Resistance)</p>
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Stocks to Watch:

BSE	PERSISYENT
GVT&D	BSOFT
HSCL	RENUKA
HFCL	POLICYBZR
NETWEB	CHEMPLASTS

Sector view:

Bullish Sectors	Bearish Sectors
MEDIA	IT
CONSR	METAL

Stock view for the day:

Stock	View	Duration	CMP	Support	Resistance
NETWEB	BULLISH	INTRADAY	4910	4861	5008
BSOFT	BEARISH	INTRADAY	325.75	319	329

Debt Market Snapshot

Forex Rates	Prev. Close	Abs. Change	Change (%)
USD/INR	95.705	-0.01	-0.01
EUR/INR	111.012	0.48	0.43
GBP/INR	128.398	0.52	0.41
JPY/INR	59.8232	0.06	0.09

Particulars	Latest	Previous	Change (bps)
5 Year GOI Bond	6.80	6.83	(0.03)
10 Year GOI Bond	6.99	7.02	(0.03)
15 Year GOI Bond	7.32	7.35	(0.03)
Call Money (WAR)	5.28	5.28	-
CBLO (WAR)	5.04	5.13	(0.09)
US 10 Year	4.49	4.46	0.03
Crude Oil (in \$/b)	97.81	96.00	1.81
Inflation (Monthly CPI)	3.48	3.40	0.08

Highly Traded Govt. Bonds (Top 5)

Security	Volume	High	Low	LTP
6.48% GS 2035	32075	96.53	96.2950	96.5125
6.94% GS 2036	5905	99.6250	99.38	99.6250
6.68% GS 2040	4105	94.40	94.2225	94.3875
6.36% GS 2031	2340	98.25	98.1225	98.23
6.90% GS 2065	995	90.29	90.10	90.26

Government Security Market:

- The Inter-bank call money rate traded in the range of 4.60%- 5.40% on Thursday ended at 4.85%.
- The 10 year benchmark (6.48% GS 2035) closed at 6.9931% on Thursday Vs 7.0240% on Wednesday .

Global Debt Market:

US Treasury yields were largely unchanged on Thursday morning as investors await more key data on the U.S. employment picture, while renewed hopes for a Middle East ceasefire sent energy costs lower. The yield on the 10-year Treasury note the main benchmark for mortgages, auto loans and credit card debt was unchanged at 4.4828% on Thursday morning. The yield on the 2-year Treasury note, which typically reacts in line with short-term Federal Reserve interest rate decisions, was about 2 basis point lower at 4.0638%. Meanwhile, the 30-year Treasury yield, which traditionally moves on geopolitical events, was also holding steady at 4.9846%. Treasury markets are taking a breather after yields moved higher on Wednesday as new ADP data showed private payrolls rose by 122,000 in May, the strongest month since January 2025. Traders are awaiting new weekly jobless claims data from the Department of Labor later this morning, ahead of crucial non-farm payrolls data and unemployment numbers on Friday. U.S. unemployment benefit claims increased by 5,000 to 215,000 for the third week of May. Elsewhere, investors continue to monitor developments in the Middle East conflict and their impact on the U.S. economy. Oil prices dipped on Thursday morning as Israel and Lebanon agreed to implement a ceasefire. U.S. West Texas Intermediate futures were 1.2% lower at \$94.91 per barrel, while Brent crude, the global oil price benchmark, slipped 1.4% to \$96.49.

10 Year Benchmark Technical View :

The 10 year Benchmark (6.48% GS 2035) yield likely to move in the range of 6.97% to 7.02% level on Friday.

Tax free Bonds in Secondary Market:

Issuer	Coupon	Yield	LTP	Volume	Maturity Date
875NHAI29	8.7500	5.21	1,099	4,296	5-Feb-29
76NHAI31	7.6000	5.29	1,095	1,331	11-Jan-31
830NHAI27	8.3000	5.26	1,075	1,340	25-Jan-27
769NHAI31	7.6900	5.25	1,138	1,009	9-Mar-31
888REC29	8.8800	4.94	1,138	812	24-Mar-29

Taxable Bonds in Secondary Market:

Issuer	Coupon	Yield	LTP	Volume	Maturity Date
915APSBC31	9.1500	8.79	1,02,749.88	80	28-Nov-31
915APSBC33	9.1500	9.05	1,02,193.18	37	30-Nov-33
1102NFL26	11.0200	-1.23	1,299.00	1,107	18-Jul-26
840CIFCL28	8.4000	8.19	1,011	695	4-May-28
890AEL31	8.9000	8.68	1,041.96	600	12-Jan-31

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