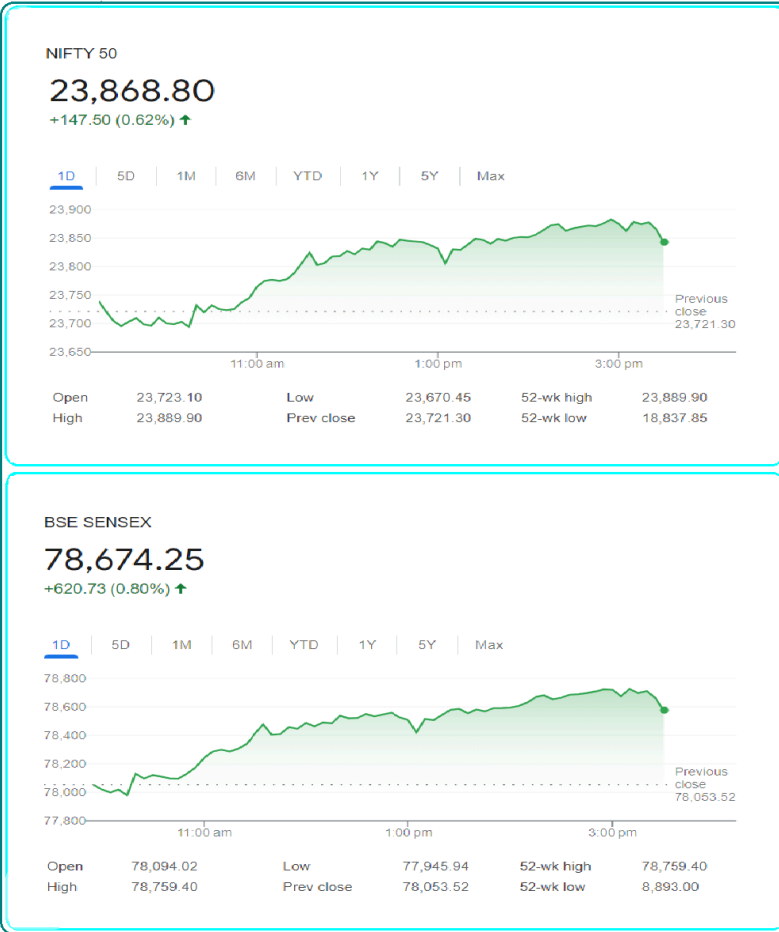


## Index Chart



(Source: [Bloomberg](#))

## Indian Markets

Indices	Close	Previous	Change(%)
<b>NIFTY 50</b>	23868.80	23721.30	<b>0.62%</b>
<b>S&amp;P BSE SENSEX</b>	78674.25	78053.52	<b>0.80%</b>
<b>NIFTY MID100</b>	55245.80	55368.55	<b>-0.22%</b>
<b>NIFTY SML100</b>	18288.00	18242.05	<b>0.25%</b>

(Source: [NSE](#), [BSE](#))

## Sectoral Indices

Indices	Close	Previous	Change(%)
<b>NIFTY BANK</b>	52870.50	52606.00	<b>0.50%</b>

## Market Wrap Up

- The key equity indices ended with substantial gains, rising for third day in a row. The Nifty settled above the 23,850 mark.
- The S&P BSE Sensex, was up 620.73 points or 0.80% to 78,674.25. The Nifty 50 index gained 147.50 points or 0.62% to 23,868.80.
- The Sensex and Nifty clocked an all-time high of 78,759.40 and 23,889.90, respectively in late trade. Further, the Nifty Bank registered an all-time high of 52,988.30 in late trade.
- The S&P BSE Mid-Cap index fell 0.29% and the S&P BSE Small-Cap index rose 0.15%.
- Among the sectoral indices, the Nifty Media index (up 1.60%) and the Nifty Oil & Gas index (up 1.39%) outperformed the Nifty 50 index.
- Meanwhile, the Nifty Metal index (down 1.45%), the Nifty Realty index (down 1.43%) and the Nifty Auto index (down 0.92%) underperformed the Nifty 50 index.

(Source: Capitaline Market Commentary)

## Derivative Watch

- Nifty **July** series futures witnessed a fresh **long** position build up. Open Interest has been increased by **115013** contracts at the end of the day.
- **Long** position build up for the **July** series has been witnessed in **RELIANCE**, **LT**, **BHARTIARTL**, **SBIN**, **ICICIBANK**, **ADANI PORTS**.
- **Short** position build up for the **July** series has been witnessed in **HDFCBANK**, **INFY**, **BAJAJFINSV**.

(Source: Capitaline F&O)

NIFTY AUTO	25018.90	25250.25	-0.92%
NIFTY FMCG	56465.20	56246.35	0.39%
NIFTY IT	35406.55	35426.90	-0.06%
NIFTY METAL	9714.30	9857.45	-1.45%
NIFTY PHARMA	19545.35	19532.30	0.07%
NIFTY REALTY	1099.50	1115.50	-1.43%
BSE CG	72683.19	72694.07	-0.01%
BSE CD	58765.98	59060.12	-0.50%
BSE Oil & GAS	28795.77	28516.59	0.98%
BSE POWER	7823.59	7832.49	-0.11%

(Source: [NSE](#), [BSE](#))

## Asia Pacific Markets

Indices	Close	Previous	Change (%)
NIKKEI225	39667.07	39173.15	1.26%
HANG SENG	18089.93	18072.90	0.09%
STRAITS TIMES	3331.70	3326.28	0.16%
SHANGHAI	2972.53	2950.00	0.76%
KOSPI	2792.05	2774.39	0.64%
JAKARTA	6905.64	6882.70	0.33%
TAIWAN	22986.69	22875.97	0.48%
KLSE COMPOSITE	1590.95	1585.38	0.35%
ALL ORDINARIES	8022.90	8076.90	-0.67%

(Source: [Yahoo Finance](#))

## Exchange Turnover (Crores)

Market	Current	Previous
NSE Cash	137796.94	125361.63
NSE F&O	58751446.17	49307152.96

(Source: [NSE](#))

## FII Activities (Crores)

ACTIVITIES	Cash
NET BUY	-
NET SELL	3535.43

(Source: [NSE](#))

## Corporate News

- **UltraTech** said it had made an offer to acquire 31.6% in UAE-based RAK Cement Co for White Cement and Construction Materials PSC (RAKWCT) and acquire 15.80 crore shares.
- **Vishnu Prakash R Punglia** announced the receipt of letter of acceptance (LoA) from the Office of Superintending Engineer U.P. Jal Nigam (Urban), Naini Prayagraj, for a project worth Rs 273.11 crore.
- **ICICI Bank** has introduced 'SmartLock', a feature that allows customers to instantly lock or unlock various banking services without contacting a helpline. SmartLock is available on the bank's iMobile Pay app and it is the first of its kind in India.
- **Vedanta Resources** will sell a 2.6% stake in Indian metals-to-oil firm Vedanta to a group of institutional investors.
- **Mazagon Dock Shipbuilders** became the latest to join the list of companies to be granted the 'Navratna' status by the Department of Public Enterprises. With the Navratna status, Mazagon Dock gets the authority to invest up to Rs 1,000 crore without requiring approval from the central government. Additionally, it can invest up to 30 percent of its net worth annually, provided it does not exceed Rs 1,000 crore.
- **Tata Motors** said it has partnered with Bajaj Finance Ltd for offering financing solutions across its entire commercial vehicle portfolio.
- **Kalpataru Projects International** has secured orders worth Rs 2,333 crore. The company said its new orders include Transmission & Distribution (T&D) business in India and overseas markets, an EPC (Engineering Procurement Construction) order for an industrial plant in the metal industry and a residential building order in India. Kalpataru Projects International Limited (KPIL) and its Joint Ventures (JVs) and international subsidiaries have secured new orders worth Rs 2,333 crore.
- **Waaree Energies** has secured a solar module supply contract for a 412 MWp project in Rajasthan. It will supply bi-facial solar modules with capacities ranging from 540-545 Wp (watt peak) each for the project, expected to

## Top Gainers

SCRIP NAME	Close	Previous	Change (%)
RELIANCE	3028.05	2908.30	4.12%
BHARTIARTL	1459.50	1414.95	3.15%
ULTRACEMCO	11143.10	10846.20	2.74%
ICICIBANK	1218.00	1197.95	1.67%
GRASIM	2552.25	2516.95	1.40%

(Source: [Moneycontrol](#))

## Top Losers

SCRIP NAME	Close	Previous	Change (%)
APOLLOHOSP	6136.80	6295.35	-2.52%
M&M	2851.50	2909.40	-1.99%
BAJAJ-AUTO	9474.65	9659.95	-1.92%
TATASTEEL	172.56	175.68	-1.78%
HINDALCO	674.70	685.50	-1.58%

(Source: [Moneycontrol](#))

be commissioned by March 2025

- **Reliance Retail** has started the pilot of immediate delivery of groceries and fast-moving consumer goods (FMCG) products in certain areas of Mumbai and Navi Mumbai where orders will be fulfilled within an hour.
- **Punjab & Sind Bank** has signed an initial agreement with the Indian Army on defence salary package which will come with a host of facilities, including free insurance cover. A memorandum of understanding (MoU) has been signed to this effect.
- **Tech Mahindra's** subsidiaries - Healthnxt and Tech Mahindra Americas (TMA) approved merger of Healthnxt with the company.
- **Tata Electronics** announced a memorandum of understanding (MoU) with Synopsys, provider of silicon to systems design solutions, to collaborate on process technology and foundry design platform to accelerate customer products in India's first fab unit.

(Source: [Business Standard](#), [Economic Times](#), [Smart investor](#))

## Global News

- U.S. seasonally adjusted house price index increased 0.2% from the previous month. House prices rose 6.3% year-on-year in April, which was more than double the 3.1% gain registered in the same month last year.
- U.S. Conference Board Consumer Confidence Index fell to 100.4 from 101.3 in May.
- Germany's GfK Consumer Climate Indicator dropped to -21.8 heading into July 2024 from a marginally revised -21.0 in the prior period.
- French consumer confidence indicator fell to 89 in June 2024, edging down from 90 in the previous month.

(Source: [Market Watch](#), [RTT News](#), [Reuters](#), [Bloomberg](#))

## Economic News

- Crude Oil traded at US\$ 81.33/bbl (IST 17:00).
- INR weakened to Rs. 83.57 from Rs. 83.43 against each US\$ resulting in daily change of 0.17%.
- India's external debt was placed at \$663.8 billion, an increase of US\$ 39.7 billion over its level at end-March 2023. If the valuation effect were excluded, external debt would have increased by \$48.4 billion instead of \$ 39.7 billion.
- Usage of India's digital currency, the e-rupee, has slumped to just a tenth of the peak hit in December, four sources said, reflecting the struggles several countries have experienced in trying to generate public support for digital currencies.
- The Centre imposed a stockholding limit on wheat to contain price rise even as it expects the prices of green vegetables, potato and onions to cool down as the heatwave has subsided over large parts of the country.

(Source: [Economic Times](#), [Business Standard](#))

## Forthcoming Events

### Board Meetings as on 27/06/2024

RBL Bank Limited	Fund Raising
Satin Creditcare Network Limited	Fund Raising
AU Small Finance Bank Limited	Fund Raising
Ind-Swift Laboratories Limited	Fund Raising
Transwarranty Finance Limited	Fund Raising

(Source: NSE)

### Corporate Actions as on 27/06/2024

Titan Company Limited	Dividend - Rs 11 Per Share
Aurionpro Solutions Limited	Bonus 1:1
Share India Securities Limited	Face Value Split (Sub-Division) - From Rs 10/- Per Share To Rs 2/- Per Share
Supreme Petrochem Limited	Dividend - Rs 7 Per Share

(Source: NSE)

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