

Nifty Futures	Level 1	Level 2	Level 3
Resistance	23,280	23,450	23,580
Support	23,050	22,880	22,700

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	23,215.0	-27.2	-0.1
Nifty Future (May)	23,235.5	-95.6	-0.4
Nifty Future (June)	23,337.0	-88.2	-0.4
Nifty Bank	55,100.3	-94.2	-0.2
Nifty 100	24,200.8	-74.9	-0.3
Nifty 500	22,233.9	-136.3	-0.6
NIFTY MIDCAP 100	59,810.2	-905.3	-1.5

Indices (BSE)	Close	Pts. Chg	% Chg
BSE SENSEX	73,983.2	64.4	0.1
BSE 100	24,673.7	-72.2	-0.3
BSE 200	10,832.8	-54.2	-0.5
BSE AllCap	10,188.3	-67.5	-0.7
BSE MidCap	45,506.5	-633.9	-1.4
BSE SmallCap	52,538.1	-666.3	-1.3

Sectoral Indices	Close	Pts. Chg	% Chg
BSE BANKEX	62,059.0	-205.8	-0.3
BSE CAPITAL GOODS	78,091.1	-1136.1	-1.4
BSE REALTY	5,839.4	-104.8	-1.8
BSE POWER	7,867.9	-131.4	-1.6
BSE OIL & GAS	25,757.4	-463.4	-1.8
BSE METAL	41,563.9	-791.6	-1.9
BSE CONSUMER DURABLES	57,502.6	-482.8	-0.8
BSE AUTO	56,853.2	-472.3	-0.8
BSE TECK	-	-	-
BSE Information Technology	27,552.4	-235.6	-0.9
BSE Fast Moving Consumer Goods	18,135.9	150.4	0.8
BSE Healthcare	46,983.3	-223.4	-0.5
India VIX	15.6	0.1	0.0

Exchange	Advance	Decline	Unchanged
BSE	1,399	2,818	209
NSE	1,123	2,391	71

Volume	Current Rs (in cr)	% Chg
NSE Cash	1,19,714.1	-2.8
BSE Cash	8,413.1	2.8
NSE F&O	-	-

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	14,047.8	16,172.8	-2,125.0
DII	17,396.4	14,272.5	3,124.0

Intraday Nifty Outlook

Nifty 50 closed at 23,215, declining 27 points in a shooting star candle with a 191-point upper shadow. The index rallied to 23,425 before complete rejection, confirming that overhead supply between 23,400 and 23,425 is institutional grade and not easily absorbed. GIFT Nifty implies a gap-down, pushing the index around 23,100 at the open, below the demand zone floor that has held for seven consecutive sessions. A gap-down breach followed by a close below 23,100 would be the most bearish structural development in several weeks, signalling a fresh downleg toward 22,700. A hold above 23,050 with a reversal candle remains the only setup for longs. MACD histogram continues to improve marginally, with MACD line still below signal, the bearish momentum is decelerating but has not reversed. RSI at 39.01 remains in near-oversold territory. 23,280 and 23,450 remain distant overhead resistances.

Corporate News

UltraTech Cement buys stake in renewable energy firm to cut power costs

UltraTech Cement has signed agreements to acquire a 13.99% stake in FPEL Services Pvt. Ltd., a renewable energy company focused on wind power generation and transmission, for ₹12.09 crore. The investment is aimed at meeting the company's green energy requirements, reducing energy costs and complying with captive power consumption regulations. Additionally, its subsidiary, India Cements, will acquire a 12.48% stake in FPEL Services for ₹10.78 crore under a similar arrangement. The transaction is not a related-party deal, and the acquisition is expected to be completed within 180 days.

Source: CNBC

Lenskart Block Deal | Platinum Jasmine likely to sell 2.3% stake for ₹1,944 crore

A block deal in eyewear firm Lenskart Solutions Ltd is expected on Thursday (June 11), with Platinum Jasmine A 2018 Trust likely to sell a 2.3% stake in the company, sources close to the development said. The floor price for the deal has been set at ₹486 per share, which is a 2.8% discount to the stock's closing price, sources said. Through the transaction, Platinum Jasmine A 2018 Trust is looking to raise ₹1,944 crore. The residual holding of the seller will be subject to a 90-day lock-up period.

Source: CNBC

Vascon Engineers secures ₹347 crore order for RBI quarters redevelopment in Guwahati

Pune-based construction company Vascon Engineers Ltd on Wednesday (June 10) said it has received a ₹347.43 crore Letter of Intent from the Central Public Works Department, Guwahati Division, for demolition and redevelopment of RBI Quarters at Zoo-Narengi Road Colony in Guwahati, Assam. "We are pleased to inform that Vascon Engineers Limited has received a Letter of Intent amounting to ₹347.43 Crore [Three hundred forty-seven crores forty-three lakhs) (including GST)] from the Central Public Works Department, Guwahati, for "Demolition and Re-development of RBI Quarters at Zoo-Narengi Road Colony, Guwahati, Assam". The work has been awarded on 'EPC Basis'," according to a stock exchange filing. The project has been awarded on an EPC basis and involves demolition and redevelopment of the RBI Quarters. As per the company's filing, the work is to be completed within 36 months from the date of receipt of the order. The contract has been awarded by a domestic entity, and the order value includes GST.

Source: CNBC

Morning Wealth

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
NESTLEIND	1,438.3	27.9	2.0
HINDUNILVR	2,169.5	36.7	1.7
AXISBANK	1,314.5	22.1	1.7
KOTAKBANK	388.1	6.4	1.7
ICICIBANK	1,293.3	18.3	1.4

Nifty Top 5 Losers	Close	Pts. Chg	% Chg
HINDALCO	1,039.3	-37.4	-3.5
COALINDIA	451.0	-15.9	-3.4
ONGC	251.9	-7.1	-2.7
ETERNAL	239.8	-5.8	-2.4
SBILIFE	1,728.7	-40.4	-2.3

Int. Indices	Close	Pts. Chg	% Chg
S&P 500	7,267.0	-119.7	-1.6
Dow Jones	49,918.8	-953.3	-1.9
Nasdaq	25,169.5	-509.3	-2.0
FTSE 100	10,254.8	27.5	0.3
DAX	24,195.3	-237.8	-1.0
CAC 40	8,161.8	-41.6	-0.5
Nikkei 225	63,736.0	-443.3	-0.7
Hang Seng	24,058.0	-350.0	-1.5

ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	23.2	-0.1	-0.4
ICICI Bank ADR	26.8	0.5	1.8
Infosys ADR	11.8	-0.5	-4.1
Wipro ADR	2.1	-0.1	-2.9

Currencies	Close	Pts. Chg	% Chg
Dollar Index*	100.0	0.0	0.0
USD/INR	95.3	-0.1	-0.1
EURO/INR	110.0	0.0	0.0
USD/YEN*	160.5	0.2	0.1

Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,47,946.0	-4,497.0	-3.0%
Silver (spot) Rs	2,36,300.0	-2,228.0	-0.9%
Crude (Brent) \$*	94.6	1.5	1.6%
Crude Oil (WTI) \$*	91.8	1.7	1.9%

*rates as at 8.30 am

Economy

GeM Procurement from MSEs Crosses US\$ 95.6 billion; Registered Units Rise to 11.9 Lakh

Since its launch in 2016, the Government e-Marketplace (GeM) has transformed public procurement in India through a transparent and technology-driven platform. Procurement worth over Rs. 8.69 lakh crore has been sourced from MSEs, while registered MSEs have grown from 2,396 to over 11.9 lakh and total orders have crossed 2.17 crore. By enabling online onboarding, transparent bidding and digital contract management, GeM has expanded access to government procurement opportunities for businesses across the country. The platform has also promoted inclusive growth by supporting women-led enterprises, startups and SC/ST-owned MSEs. Procurement from women-owned businesses exceeded Rs. 93,327 crore, startup procurement crossed Rs. 61,400 crore and procurement from SC/ST MSEs surpassed Rs. 21,800 crore. GeM has additionally supported major public initiatives, including the procurement of over 324 crore vaccine doses and 199 crore syringes, while leveraging AI and digital tools to improve efficiency, transparency and accountability in government procurement.

Source: IBEF

International News

Consumer prices rose 4.2% annually in May, highest in three years

U.S. inflation accelerated in May, with the Consumer Price Index (CPI) rising 0.5% month-on-month and 4.2% year-on-year, marking the highest inflation rate in three years. The increase was largely driven by a sharp rise in energy prices, which climbed 3.9% during the month and 23.5% over the past year. However, underlying inflation remained relatively moderate, as core CPI (excluding food and energy) increased just 0.2% monthly and 2.9% annually, indicating that broader price pressures are not intensifying significantly. Food prices rose modestly by 0.2%, while shelter inflation slowed to 0.3%, providing some relief in key consumer spending categories. The data suggests that higher energy costs have not yet spread widely across the economy. Transportation services declined 0.6%, new vehicle prices fell 0.3%, and core goods prices edged down 0.1%, reflecting limited pass-through from rising fuel costs and tariffs. Airfares were a notable exception, increasing 2.7% due to higher fuel expenses. Despite inflation reaching a three-year high, financial markets continue to expect the Federal Reserve to keep interest rates unchanged in the near term, although concerns remain that ongoing geopolitical tensions and elevated oil prices could sustain inflationary pressures in the coming months.

Source: CNBC

Major Bulk Deal (NSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

Major Bulk Deal (BSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

Morning Wealth

EVENTS CALENDAR

Monday 08–June-2026	Tuesday 09–June-2026	Wednesday 10–June-2026	Thursday 11–June-2026	Friday 12–June-2026
Results– Economic — Global– Japan GDP (QoQ) (Q1)	Results– Economic — Global– US Trade Balance (Apr), Existing Home Sales (May), China Trade Balance (USD) (May)	Results– Economic— Global– US CPI (MoM) (May), China CPI (YoY) (May)	Results– Economic — Global– ECB Interest Rate Decision (Jun), US PPI (MoM) (May), US Initial Jobless Claims	Results– Economic — CPI (YoY) (May), FX Reserves, USD Global–
15–June-2026 Results– Economic — WPI Inflation (YoY) (May) Global–	16–June-2026 Results– Economic — Global– US Building Permits (May), China Chinese Unemployment Rate (May)	17–June-2026 Results– Economic— Global– EU CPI (YoY) (May), US Retail Sales (MoM) (May), US Fed Interest Rate Decision	18–June-2026 Results– Economic — Global– US Philadelphia Fed Manufacturing Index (Jun)	19–June-2026 Results– Economic — Global– Japan National Core CPI (YoY) (May)
22–June-2026 Results– Economic — Global– China PBoC Loan Prime Rate (Jun)	23–June-2026 Results– Economic — S&P Global Manufacturing & Services PMI (Jun) Global– HCOB Eurozone Services & Manufacturing PMI (Jun), US S&P Global Services PMI	24–June-2026 Results– Economic— Global– US New Home Sales (May)	25–June-2026 Results– Economic — Global– US Core PCE Price Index (May), US GDP (QoQ) (Q1)	26–June-2026 Results– Economic — Global–

(Source: Investing.com and BSE)

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