



The Nifty previous session ended 0.05% down at 15,574.85. It opened on a positive note and remained range-bound throughout the session towards finishing off on an indecisive note. Chart pattern suggests, 15,600-15,650 is likely to act as the thick resistance while the short-term critical support is placed around 15,300 levels. Index majors not moving in tandem with the Nifty is a concern. Hence, staying cautious on rise is advised. Nifty probable trading range is likely to be 15,650-15,300.

On the Nifty hourly chart, both the leading indicators are hovering in the overbought zone. Hence, staying cautious on rise advised.

Nifty patterns on multiple time frames suggest; it looks extremely overbought on the short-term chart, which brightens the possibility of a retracement towards 15,300 levels. Hence, staying cautious on rise is advised.

Nifty Crucial Supports & Resistances-

Supports- 15300, 15200 Resistances- 15600, 15650

Open Positional Calls-

T+3 Positional Buy-
|Cash Segment| PFC @ 117-116,
TGT- 124, Closing SL- 112

T+3 Positional Buy-
|Cash Segment| NMDC on dips
around @ 181-180, TGT- 190, SL-
closing below 175

T+3 Positional Buy-
|Cash Segment| M&M FIN on dips
around @ 158-157, TGT- 167, SL-
closing below 152

T+10 Positional Buy-
|Cash Segment| EXIDE on dips
around @ 192-190, TGT- 210, SL-
closing below 180

T+2 Positional Buy-
|Cash Segment| MOTHER SUMI @
240-239, TGT- 247, Closing SL- 235

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Nifty Intraday Chart



Market in Retrospect

Nifty Halts 7-Day Rally.

Nifty index ended 0.05% lower at 15,575. The broader markets represented by the NIFTY 500 Index ended 0.12% higher, ending at 13,210. Among the sectorial indices, NIFTY Energy was the top gainer, gaining by 0.34%, followed by NIFTY Media, gaining by 0.32% higher. NIFTY Metal was the top loser, losing by 0.78%

Adani Ports & SE was the top gainer, gaining by 3.72%, followed by ONGC and Bajaj Finance which gained by 3.48% & 2.79% respectively. JSW Steel was the top loser, losing by 2.31%, followed by Tata Steel and ICICI Bank which fell by 2.20% & 1.91% respectively.

The Advance : Decline ratio stood at 728:1245

Market Turnover (In Crore) 01-06-2021

Name	Last	Previous
NSE Cash	64176.40	72336.30
NSE F&O	3932625.77	3079549.69
BSE Cash	4,533.80	5,316.21
BSE F&O	*NA	65.24

FII Derivatives Flow (In Crore) 31-05-2021*

Instrument	Purchase	Sale	Net
Index Future	2570.51	3260.79	690.28
Index Option	294601.52	291977.23	2624.29
Stock Future	12819.43	13020.19	200.76
Stock Option	14325.32	14467.03	141.71

Institutional Flow (In Crore) 31-05-2021*

Institution	Purchase	Sale	Net
FII	7456.51	5044.12	2412.39
DII	4912.06	4732.28	179.78

*Data not updated till 5:30pm

NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Adani Ports & SE	3.72	4.48	17847137	8291895
ONGC	3.48	2.62	51620011	19290070
Bajaj Finance	2.79	2.96	2853451	1941414
SBI	1.93	4.90	59299647	57045490
Bajaj Auto	1.10	2.14	1248169	408918

NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Ultratech Cement	1.59	0.68	397989	548967
Grasim Industries	1.81	5.07	1117622	3494937
ICICI Bank	1.91	0.03	14123196	17739790
Tata Steel	2.20	0.39	17690925	18194940
JSW Steel	2.31	0.90	14156453	16055060

Bulk and Block Deals

<https://www.nseindia.com/products/content/equities/equities/bulk.htm>
<http://www.bseindia.com/markets/equity/EQReports/BulknBlockDeals.aspx>

Sensex Intraday Chart



Market in Detailed (Updated after 4:00 PM)

Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	51934.88	2.56	0.00	2.56	6.46	4.18	55.94
Nifty	15574.85	7.95	0.05	2.41	6.45	5.51	58.50
BSE M Cap	21760.70	2.31	0.01	0.73	7.13	7.35	78.99
BSE S Cap	23522.99	72.99	0.31	0.73	8.55	14.86	109.60
Nifty MC 100	25749.50	25.95	0.10	0.80	6.42	8.72	88.16
BSE Auto	23477.62	63.50	0.27	0.72	8.35	0.03	61.41
BSE Capgoods	22506.71	8.44	0.04	0.80	11.13	3.07	80.52
BSE FMCG	13134.84	4.11	0.03	1.26	5.01	8.62	19.14
BSE Metal	18570.51	306.82	1.63	0.65	4.20	32.61	162.60
BSE Oil&Gas	16588.80	116.49	0.71	2.72	10.62	4.70	38.36
BSE Healthcare	24537.21	2.23	0.01	0.33	4.28	16.11	56.18
BSE Power	2816.03	0.41	0.01	1.31	13.50	14.08	86.45
BSE Realty	2666.05	13.96	0.52	2.60	8.02	5.62	84.00
BSE ConsDur	33473.84	84.57	0.25	1.15	3.56	3.76	65.63
BSE Bank	40120.90	223.78	0.55	1.96	7.55	1.27	75.53
BSE IT	27521.71	63.10	0.23	2.01	4.62	11.30	91.58

Bond Markets

Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	1.62	0.02	1.39	3.70	0.58	14.07	145.24
UK	0.81	0.02	1.89	3.05	3.80	6.72	250.65
Brazil	3.75	0.03	0.69	2.98	6.51	4.44	25.15
Japan	0.08	0.00	4.60	6.41	14.43	46.45	492.86
Australia	1.69	0.02	1.11	0.36	3.09	1.32	89.05
India	6.02	0.00	0.03	0.62	0.10	2.96	4.28
Switzerland	0.15	0.01	5.00	10.06	24.00	44.12	67.24
Germany	0.19	0.00	0.00	11.98	7.43	44.01	53.48

Currency

Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	72.90	0.28	0.39	0.17	1.42	0.89	3.63
USD Index	89.84	0.01	0.01	0.00	1.58	1.32	8.17
YUAN	6.38	0.01	0.20	0.44	1.44	1.30	11.67
GBP	1.42	0.00	0.24	0.18	1.92	1.82	13.50
EUR	1.22	0.00	0.05	0.24	1.30	1.43	9.74
YEN	109.59	0.01	0.01	0.74	0.47	2.58	1.83

Freight

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	2596.00	92.00	3.42	9.52	14.97	54.99	415.08
Baltic Dirty	604.00	1.00	0.17	1.47	0.33	9.72	15.29
SG Dubai HY	0.60	0.20	25.00	172.73	63.64	54.20	125.64

Global Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	34529.45	64.81	0.19	0.94	1.93	11.63	36.03
Nasdaq	13748.74	12.46	0.09	2.06	1.53	4.22	44.88
S&P 500	4204.11	3.23	0.08	1.16	0.55	10.31	38.10
FTSE100	7098.61	76.36	1.09	0.67	1.85	9.49	16.82
CAC40	6500.64	52.96	0.82	1.72	3.68	12.21	36.48
DAX	15642.69	222.63	1.44	1.16	3.36	11.64	35.01
Mexico IPC	50885.95	845.21	1.69	2.89	5.99	13.62	37.60
Brazil Bovespa	126215.8	654.30	0.52	1.76	6.16	14.39	42.42
Russian RTS	1618.00	20.41	1.28	2.36	8.95	12.12	29.68
Japan Nikkei	28814.34	45.74	0.16	0.91	0.01	2.86	30.60
Hang Seng	29468.00	316.20	1.08	1.93	2.59	0.05	24.17
Taiwan Index	17162.38	93.95	0.55	3.41	2.30	7.58	54.91
Shanghai Comp	3624.71	9.24	0.26	1.21	5.16	2.06	24.33
KOSPI	3221.87	17.95	0.56	1.59	2.35	6.93	56.02
Malaysia KLCI	1585.90	2.35	0.15	0.90	0.98	1.20	6.43
Jakarta Comp	5947.46	98.85	1.69	3.02	0.80	6.17	25.11
Philippine SE	6627.43	1.06	0.02	6.95	4.03	3.57	11.76
Thai Exch	1618.59	25.00	1.57	4.30	2.24	7.84	19.69

Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	68.11	1.77	2.67	3.09	7.09	12.29	92.13
BRENT Crude	70.72	1.38	1.99	3.23	6.67	14.48	67.54
Natural Gas	3.07	0.09	2.88	3.78	3.16	4.88	20.19

LME

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1905.86	1.48	0.08	0.32	7.70	10.46	9.53
Silver(\$/Ounce)	28.22	0.18	0.64	0.74	8.83	6.15	54.11
Aluminium	2458.51	7.26	0.30	5.08	2.67	14.39	62.34
Copper	10248.25	43.10	0.42	3.86	3.72	12.13	93.16
Zinc	3043.55	0.45	0.01	2.87	4.84	9.66	56.88
Lead	2196.25	12.50	0.57	0.13	5.56	7.73	36.12

Agro Commodities

Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	164.40	2.05	1.26	10.34	16.22	19.35	53.00
Cotton	84.80	1.48	1.78	1.81	0.31	2.29	44.61
Sugar	17.73	0.37	2.13	5.35	4.42	12.86	53.77
Wheat	677.00	13.50	2.03	2.23	7.86	5.37	25.84
Soybean	1542.00	11.50	0.75	1.26	0.51	11.66	78.42

Narayana Hrudayalaya Ltd.

- Q4FY21 consolidated operating revenue increased by 12.8% YoY to INR8,378 million. FY21 consolidated operating revenue decreased by 17.4% YoY to INR25,823 million.
- Q4FY21 consolidated EBITDA increased by 47.7% YoY to INR1,414 million. FY21 consolidated EBITDA decreased by 56.9% YoY to INR1,821 million.
- Q4FY21 consolidated EBITDA margin was 16.9% (+400bps YoY). FY21 consolidated EBITDA margin was 7.1% (-650bps YoY).
- Q4FY21 PAT was INR680 million (+468.7% YoY). FY21 PAT was -143 million (-112% YoY).
- Q4FY21 PAT margin was 8.1% (+650bps YoY). FY21 PAT margin was -0.6% (-440bps YoY).
- Consolidated net debt as on 31st March 2021 was INR4,857 million leading to a debt equity ratio of 0.43.
- 34% of the FY21 India revenue came from cardiac sciences.
- 50% of the FY21 India revenue came from cash paying patients.
- Bangalore and Kolkata were the leading revenue generators of FY21 at 32% and 27% respectively.
- ARPOB for India business was INR11 million in Q4FY21 compared to INR9.9 million in Q4FY20. ARPOB for India business was INR10.4 million in FY21 compared to INR9.7 million in FY20.
- ALOS for India business was 4.8 days in Q4FY21 compared to 3.5 days in Q4FY20. The numbers for FY21 and FY20 were 4.6 and 3.5 respectively.
- Discharges for India business was 48,218 persons for Q4FY21. Discharges for Q4FY20 was 67,387. FY21 discharges were 1,55,529 vs. 2,85,908 in FY20.
- ARPOB for Cayman came at USD 2 million in Q4FY21 compared to USD 1.5 million in Q4FY20. FY21 and FY20 figures were USD 1.9 million and USD 1.5 million respectively.
- Discharges in Cayman for Q4FY21 was 582 compared to 584 in Q4FY20. Discharges for FY21 were 2,122 vs. 2,581 in FY20.
- In the backdrop of the current unprecedented surge in Covid-19 cases across the country leading to localized lockdowns coupled with restrictions on international travel, Narayana remains cautious about a near term recovery in the business. However, with the agility and the resilience demonstrated by its team in the year gone by, it remains confident about its business prospects over the long term.

Rupa & Company Ltd.

Q4FY21- Consolidated-

- Company's Net sales increased by 153.2% and by 31.4% on YoY and QoQ basis respectively to INR4,539.9 mn.
- Q4FY21 Gross margin increased by 247 bps & 124 bps on YoY and QoQ basis respectively to 35.7%.
- Q4FY21 EBITDA stood at INR906.1 mn Vs 78.8 mn in Q4FY20. Q4FY21 EBITDA margin increased by 1,556 bps YoY to 20%.
- Company posted a PAT of INR659 mn vs INR42.8 mn loss in Q4FY20.
- EPS 8.29 vs -0.5 YoY

FY21- Consolidated-

- Company's Net sales increased by 34.7% on YoY basis to INR13,127 mn.
- FY21 Gross margin decreased by 22 bps YoY to 35%.
- FY21 EBITDA increased by 126.2% YoY to 2,573.4 mn. FY21 EBITDA margin increased by 793 bps to 19.6%.
- FY21 PAT increased by 183% YoY to INR1752.6 mn
- EPS 22.0 vs 7.8 YoY
- The Board has recommended a dividend of INR5/- per equity share of INR1 each for the year ended 31st March, 2021.
- FY21 Net Debt stood at INR270 mn, reduced from INR1770 mn in FY20.
- At the end of FY21, cash & bank balances stood at INR1,180 mn, improved from INR17 mn in FY20.
- There has been a reduction in net working capital days by 54 days YoY to 165 days in FY21.

Jamna Auto

Jamna Auto reported net sales at INR484.40 crore in March 2021 up 103.96% from INR237.49 crore in March 2020. Quarterly Net Profit at INR47.50 crore in March 2021 up 330.54% from INR11.03 crore in March 2020. EBITDA stands at INR75.07 crore in March 2021 up 131.27% from INR32.46 crore in March 2020. Jamna Auto EPS has increased to INR1.19 in March 2021 from INR0.28 in March 2020.

Honeywell Automation India

Net profit of Honeywell Automation India declined 6.41% to INR104.02 crore in the quarter ended March 2021 as against INR111.14 crore during the previous quarter ended March 2020. Sales declined 4.48% to INR672.70 crore in the quarter ended March 2021 as against INR704.26 crore during the previous quarter ended March 2020. For the full year, net profit declined 6.40% to INR460.04 crore in the year ended March 2021 as against INR491.48 crore during the previous year ended March 2020. Sales declined 7.51% to INR3042.78 crore in the year ended March 2021 as against INR3290.01 crore during the previous year ended March 2020.

Magma Fincorp

Net Sales at INR434.70 crore in March 2021 down 16.31% from INR519.43 crore in March 2020. Quarterly Net Loss at INR625.91 crore in March 2021 down 1670.61% from INR35.35 crore in March 2020. EBITDA stands negative at INR631.32 crore in March 2021 down 327.14% from INR277.94 crore in March 2020.

Tourism Finance Corporation of India

Net profit of Tourism Finance Corporation of India rose 49.38% to INR18.18 crore in the quarter ended March 2021 as against INR12.17 crore during the previous quarter ended March 2020. Sales rose 9.43% to INR59.52 crore in the quarter ended March 2021 as against INR54.39 crore during the previous quarter ended March 2020. For the full year, net profit declined 0.33% to INR80.75 crore in the year ended March 2021 as against INR81.02 crore during the previous year ended March 2020. Sales declined 1.64% to INR258.45 crore in the year ended March 2021 as against INR262.75 crore during the previous year ended March 2020.

Radico Khaitan

Net profit of Radico Khaitan rose 125.07% to INR73.53 crore in the quarter ended March 2021 as against INR32.67 crore during the previous quarter ended March 2020. Sales rose 18.68% to INR694.73 crore in the quarter ended March 2021 as against INR585.36 crore during the previous quarter ended March 2020. For the full year, net profit rose 20.96% to INR277.16 crore in the year ended March 2021 as against INR229.14 crore during the previous year ended March 2020. Sales declined 0.37% to INR2418.14 crore in the year ended March 2021 as against INR2427.04 crore during the previous year ended March 2020.

Balrampur Chini Mills

Net profit of Balrampur Chini Mills declined 2.46% to INR235.50 crore in the quarter ended March 2021 as against INR241.44 crore during the previous quarter ended March 2020. Sales declined 41.42% to INR1019.36 crore in the quarter ended March 2021 as against INR1740.05 crore during the previous quarter ended March 2020. For the full year, net profit declined 7.62% to INR479.79 crore in the year ended March 2021 as against INR519.35 crore during the previous year ended March 2020. Sales rose 1.48% to INR4811.66 crore in the year ended March 2021 as against INR4741.29 crore during the previous year ended March 2020.

TTK Prestige concludes long-term settlement with workers at Gujarat plant

TTK Prestige has concluded a long-term settlement covering all its workmen at the manufacturing unit in Gujarat. The company has successfully concluded a long-term settlement covering all its workmen at the manufacturing unit at Karjan, Gujarat. This settlement provides for better productivity. As per TTK Prestige's website, the company has five manufacturing plants at Hosur and Coimbatore in Tamil Nadu, Karjan in Gujarat, Roorkee in Uttarakhand, Khardi in Maharashtra. TTK Prestige has rolled out a series of measures to provide COVID-19 relief and support to employees and their families, as the country grapples with the second wave of the pandemic.

Glenmark Pharma launches anti-epileptic drug, Rufinamide, in the US

Glenmark Pharma announced the launch of anti-epileptic drug Rufinamide tablets in the US market. Glenmark Pharmaceuticals Ltd has launched Rufinamide tablets USP in the strengths of 200 mg and 400 mg. The newly launched drug is a therapeutic equivalent of Banzel tablets, 200 mg and 400 mg of Eisai, Inc. Banzel tablets are used in combination with other medications to treat children with Lennox-Gastaut syndrome, a severe form of childhood epilepsy that also causes developmental and behavior problems.

Jio brings back INR98 prepaid pack after a year, here are the features

Reliance Jio's INR98 prepaid recharge plan, its cheapest, is again available now after the gap of a year, albeit with reduced validity. In its earlier version, the pack used to give 28 days of validity, which in the new iteration has been brought down to 14 days. Customers will get 1.5 GB of 4G data for 14 days. The total data on offer is 21 GB, with a daily limit of 1.5 GB.

CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / DIVIDEND / FCCB / M&A / WARRANTS ETC.

Company	Details
Kanpur Plastipack Ltd	Cash dividend of INR1 effective 02-06-2021
Ravati Organics Ltd	Corporate meeting effective 02-06-2021
Universal Arts Ltd	Corporate meeting effective 02-06-2021
Country Condo's Ltd	Corporate meeting effective 02-06-2021

Domestic Events

- **Upcoming Result's:-** APL Apollo Tubes Ltd., Arvind Fashions Ltd., Cupid Ltd., General Insurance Corporation Of India., Gujarat State Petronet Ltd., Parle Industries Ltd., Roto Pumps Ltd.

Global Events

- The U.S. MBA Mortgage Applications for May 28, 2021.

Source of News : The content may have been taken from The Economic Times, Business Standard, Business Line, Mint and other leading financial newspapers and financial portals BSE,NSE, Bloomberg, Moneycontrol & others.

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