



The Nifty ended 0.40% up at 15,746.50. It opened on a negative note, however, minor recovery in the second half led to a positive closing towards ending nearer the critical resistance placed around 15,750 levels. Ending the day with a bullish Marubozu candle stands void if the benchmark fails to breakout 15,750 decisively. Higher resistance is placed around 15,850. We prefer staying cautious on rise. Downside immediate support is placed around 15,600 levels.

On the Nifty hourly chart, direction of the leading indicators suggests downside is limited till 15,600 as of now. Resistances are placed around 15,750 and 15,850 levels.

Nifty patterns on multiple periods suggest; it ended the day with a bullish marubozu candle. Broader trading range is likely to be 15,600-15,850.

Nifty Crucial Supports & Resistances-

Supports- 15600, 15450 Resistances- 15750, 15850

Open Positional Calls-

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

T+10 Positional Buy-
|Cash Segment| BHEL @ 64-60, TGT
- 80, Closing SL- 50

T+5 Positional Buy-
|Options Segment| NIFTY 1'Jul
15450-PE @ 65-60, TGT- 120, SL-
below 30

T+5 Positional Sell-
|Futures Segment| SBIN Fut @ 419-
420, TGT- 400, SL- above 430

T+5 Positional Sell-
|Futures Segment| CAN BANK Fut
@ 153-154, TGT- 144, SL- above 159

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Nifty Intraday Chart



Market in Retrospect

Indian equity benchmarks closed higher after a volatile day of trading.

Nifty index ended 0.40% higher at 15,747. The broader markets represented by the NIFTY 500 Index ended 0.52% higher, ending at 13,456. Among the sectorial indices, NIFTY PSU Bank was the top gainer, gaining by 4.11%, followed by NIFTY Realty which was gaining by 2.33%. NIFTY Auto was the top loser, losing by 0.41%

Adani Ports & SE was the top gainer, gaining by 5.29%, followed by NTPC and Titan which gained by 3.92% & 1.84% respectively. UPL was the top loser, losing by 4.43%, followed by Wipro and Hindalco Industries which fell by 1.39% & 1.01% respectively.

The Advance : Decline ratio stood at 1255:771

Market Turnover (In Crore) 21-06-2021

Name	Last	Previous
NSE Cash	60812.8	97155.85
NSE F&O	3740220.68	3922007.00
BSE Cash	6,254.04	8,818.72
BSE F&O	*NA	22.07

FII Derivatives Flow (In Crore) 18-06-2021*

Instrument	Purchase	Sale	Net
Index Future	5438.63	5540.05	101.42
Index Option	383213.54	383639.03	425.49
Stock Future	22466.35	22687.62	221.27
Stock Option	23680.13	23293.96	386.17

Institutional Flow (In Crore) 18-06-2021*

Institution	Purchase	Sale	Net
FII	20440.85	17760.28	2680.57
DII	7052.77	6606.57	446.20

*Data not updated till 5:45pm

NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Adani Ports & SE	5.29	4.87	51759617	62339850
NTPC	3.92	0.17	34597018	20461470
Titan	1.84	0.46	925811	1087532
SBI	1.66	2.46	33128978	27003580
HDFC Life Insurance	1.35	5.43	6100487	3447105

NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Maruti Suzuki India	0.85	3.87	443795	441126
Tata Motors	0.92	6.08	29123887	36047280
Hindalco Industries	1.01	6.89	13172227	14910720
Wipro	1.39	3.46	5390821	5938628
UPL	4.43	7.48	10319132	4368015

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	52574.46	230.01	0.44	0.04	4.02	5.45	51.37
Nifty	15746.50	63.15	0.40	0.41	3.76	6.80	53.71
BSE M Cap	22420.06	181.85	0.82	1.54	4.35	11.85	75.10
BSE S Cap	24854.25	205.42	0.83	0.88	7.45	21.41	102.44
Nifty MC 100	26705.20	208.90	0.79	1.81	5.08	14.06	83.34
BSE Auto	23267.37	118.63	0.51	3.42	0.43	1.16	55.07
BSE Capgoods	22251.80	68.91	0.31	2.43	0.79	5.52	77.11
BSE FMCG	13553.64	50.15	0.37	1.89	4.72	7.79	26.03
BSE Metal	18195.96	137.37	0.76	6.31	2.39	31.10	151.74
BSE Oil&Gas	17065.17	198.72	1.18	0.77	7.99	11.93	32.40
BSE Healthcare	24888.79	123.75	0.50	2.41	1.69	21.14	53.56
BSE Power	2832.58	70.43	2.55	4.47	0.26	11.95	83.35
BSE Realty	2806.97	64.86	2.37	0.10	10.05	7.13	70.58
BSE ConsDur	35577.49	292.16	0.83	0.17	8.86	9.70	74.47
BSE Bank	39499.93	322.01	0.82	0.18	0.55	2.68	62.93
BSE IT	29065.02	81.45	0.28	0.82	8.76	11.81	99.90

Bond Markets							
Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	1.43	0.01	0.47	4.20	11.74	16.83	106.33
UK	0.75	0.01	0.80	0.68	10.12	10.98	213.45
Brazil	3.70	0.01	0.27	1.93	3.73	11.32	25.62
Japan	0.05	0.01	15.25	21.95	39.76	55.75	177.78
Australia	1.52	0.08	4.76	2.22	12.28	15.69	76.45
India	6.03	0.02	0.37	0.27	0.87	2.65	3.04
Switzerland	0.23	0.01	6.54	0.00	55.10	4.60	43.28
Germany	0.20	0.00	0.50	19.92	54.62	31.63	51.57

Currency							
Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	74.11	0.24	0.32	1.12	1.71	2.34	2.59
USD Index	92.07	0.16	0.17	1.71	2.28	0.16	5.69
YUAN	6.47	0.01	0.21	1.05	0.50	0.64	9.31
GBP	1.39	0.01	0.51	1.64	1.90	0.12	11.32
EUR	1.19	0.00	0.28	1.84	2.34	0.30	5.65
YEN	110.12	0.09	0.08	0.05	1.05	1.15	2.92

Freight							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	3218.00	49.00	1.50	12.64	12.16	41.08	106.95
Baltic Dirty	592.00	4.00	0.68	1.72	3.74	20.86	16.31
SG Dubai HY	0.55	0.03	5.17	29.49	1733.33	71.88	223.53

Global Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	33290.08	533.37	1.58	3.45	2.68	2.03	28.67
Nasdaq	14030.38	130.97	0.92	0.28	4.15	6.17	41.06
S&P 500	4166.45	55.41	1.31	1.91	0.25	6.47	34.50
FTSE100	7030.45	13.55	0.19	1.62	0.18	4.80	11.73
CAC40	6588.20	19.49	0.30	0.42	3.17	9.85	32.32
DAX	15551.74	105.31	0.68	0.77	0.75	6.38	26.13
Mexico IPC	50319.57	116.77	0.23	1.89	1.09	7.00	31.02
Brazil Bovespa	128405.4	348.20	0.27	0.80	4.74	10.48	32.96
Russian RTS	1640.27	6.49	0.39	2.79	4.50	11.27	31.25
Japan Nikkei	28010.93	953.15	3.29	3.95	1.08	5.98	24.61
Hang Seng	28489.00	312.27	1.08	1.22	0.11	1.73	15.60
Taiwan Index	17062.98	255.56	1.48	0.87	4.67	6.18	47.73
Shanghai Comp	3529.18	4.09	0.12	1.69	1.22	3.66	18.92
KOSPI	3240.79	27.14	0.83	0.35	2.67	6.62	51.35
Malaysia KLCI	1572.24	16.81	1.06	0.65	0.64	3.32	4.31
Jakarta Comp	5996.25	10.87	0.18	1.38	3.87	5.66	21.33
Philippine SE	6827.17	24.21	0.35	1.31	10.13	6.08	8.11
Thai Exch	1601.13	11.85	0.73	1.96	3.14	2.38	16.80

Indian Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	71.83	0.19	0.27	1.34	12.98	16.95	80.70
BRENT Crude	73.62	0.11	0.15	1.04	10.96	15.94	68.20
Natural Gas	3.19	0.03	0.96	5.01	6.95	18.72	24.52

LME							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1784.19	20.18	1.14	4.39	5.15	2.24	2.32
Silver(\$/Ounce)	26.03	0.25	0.97	6.53	5.54	0.79	47.74
Aluminium	2375.00	34.50	1.43	3.65	2.97	8.90	49.42
Copper	9119.75	169.25	1.82	8.57	12.11	0.58	57.69
Zinc	2808.60	89.40	3.08	7.22	7.52	1.05	37.22
Lead	2145.25	32.25	1.53	2.53	3.40	12.99	19.28

Agro Commodities							
Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	149.80	2.15	1.41	4.10	1.51	12.67	43.62
Cotton	84.64	0.54	0.63	1.73	1.71	2.58	41.28
Sugar	16.50	0.16	0.96	5.12	2.02	7.14	37.61
Wheat	659.00	6.75	1.01	2.95	2.66	6.38	26.97
Soybean	1289.75	23.25	1.77	7.56	5.20	5.72	47.02

Bharat Dynamics

Net profit of Bharat Dynamics declined 15.93% to INR260.37 crore in the quarter ended March 2021 as against INR309.72 crore during the previous quarter ended March 2020. Sales declined 21.92% to INR1106.11 crore in the quarter ended March 2021 as against INR1416.70 crore during the previous quarter ended March 2020. For the full year, net profit declined 51.81% to INR257.77 crore in the year ended March 2021 as against INR534.90 crore during the previous year ended March 2020. Sales declined 39.45% to INR1807.47 crore in the year ended March 2021 as against INR2985.29 crore during the previous year ended March 2020.

Info Edge India

Net profit of Info Edge (India) rose 157.11% to INR306.22 crore in the quarter ended March 2021 as against INR119.10 crore during the previous quarter ended March 2020. Sales declined 9.48% to INR296.53 crore in the quarter ended March 2021 as against INR327.60 crore during the previous quarter ended March 2020. For the full year, net profit reported to INR1407.08 crore in the year ended March 2021 as against net loss of INR237.62 crore during the previous year ended March 2020. Sales declined 14.62% to INR1120.12 crore in the year ended March 2021 as against INR1311.93 crore during the previous year ended March 2020.

HBL Power Systems

Net profit of HBL Power Systems rose 39.90% to INR11.50 crore in the quarter ended March 2021 as against INR8.22 crore during the previous quarter ended March 2020. Sales rose 17.05% to INR301.10 crore in the quarter ended March 2021 as against INR257.23 crore during the previous quarter ended March 2020. For the full year, net profit declined 39.43% to INR14.58 crore in the year ended March 2021 as against INR24.07 crore during the previous year ended March 2020. Sales declined 15.61% to INR908.95 crore in the year ended March 2021 as against INR1077.09 crore during the previous year ended March 2020.

Cadila, Bayer extend JV partnership for three years

Cadila Healthcare and Bayer (South East Asia) have decided to extend the operations of their joint venture by three years with effect from June. The companies had entered into an agreement on January 28, 2011, to set up the joint venture Bayer Zydus Pharma for the sales and marketing of pharmaceutical products in India. The spirit of partnership in this joint venture has all been about channeling the core strengths of both Zydus and Bayer for the benefit of the patients. During the term of the joint venture, the JV firm has launched some of Bayer's global innovative assets like Xarelto, Eylea and Visanne in India. Going ahead, Bayer Zydus Pharma will continue to operate in core therapies, including cardiovascular diseases, diabetes, women's health, ophthalmology and oncology, with new products in the pipeline.

Maruti Suzuki India to hike car prices in Jul-Sep qtr amid rise in input costs

Maruti Suzuki India will hike prices of its cars in the second quarter of the current fiscal due to increase in the input costs. Over the past year, the cost of the company's vehicles continue to be adversely impacted due to increase in various input costs. Hence, it has become imperative for the company to pass on some impact of the above additional cost to customers through a price rise. The company did not reveal the quantum of the proposed price hike. The price rise has been planned in the second quarter (July-September period) of the current financial year and the increase shall vary for different models.

Australia rejects \$36 billion wind, solar, hydrogen project

The Australian government has rejected plans for a \$36 billion wind, solar and hydrogen project in a remote area of Western Australia, leaving what would have been one of the world's largest green energy projects in limbo for now. In a decision dated June 15, published on the environment department's website, Environment Minister Sussan Ley ruled that the project, the Asian Renewable Energy Hub. The AREH project, located in the state's Pilbara region, was designed to initially build 15 gigawatts (GW) of renewable energy capacity, eventually to be expanded to 26 GW and produce green hydrogen and ammonia for export. The government had awarded the project fast-track approval status last September, touting the jobs, clean energy for local industry and large-scale export opportunity that it would bring. AREH is being developed by privately owned InterContinental Energy, renewables developer CWP Energy Asia, top global wind turbine maker Vestas and a Macquarie Group fund.

Honeywell launches authentication tech to prevent counterfeit pharma drugs

Honeywell announced digital authentication technology for the pharmaceutical industry in response to the growing menace of counterfeit products. An acute shortage of drugs to treat symptoms of COVID-19 has led to increased circulation of counterfeit medicines in recent times. It added that there are reports of fake antiviral medicines and spurious injectable immunosuppressant's in the market. With rising demand for vaccines, there is concern that fake vaccines could find their way into circulation. Earlier this year, the World Health Organisation sounded an alarm over criminal exploitation of an unmet global demand for COVID-19 vaccines. The Honeywell solution comprises a digital code that is embedded in the packaging of pharmaceutical products. The end user can validate the authenticity of the product by scanning the digital code with the help of a smartphone letting the end user know it is safe to use.

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

Company	Details
Bhansali Engineering Polymers Ltd	Cash dividend of INR1 effective 22-06-2021
Aarti Industries Ltd	Stock dividend of INR2 effective 22-06-2021
Welspun India Ltd	16.667Mln stock buyback effective 22-06-2021
Hindustan Unilever Ltd	Corporate meeting effective 22-06-2021
Nippon Life India Asset Management Ltd	Corporate meeting effective 22-06-2021
Indian Hotels Co Ltd/The	Corporate meeting effective 22-06-2021
NELCO Ltd	Corporate meeting effective 22-06-2021
Bansal Roofing Products Ltd	Corporate meeting effective 22-06-2021
Phillips Carbon Black Ltd	Corporate meeting effective 22-06-2021
PNB Housing Finance Ltd	Corporate meeting effective 22-06-2021
Fourth Dimension Solutions Ltd	Corporate meeting effective 22-06-2021

Domestic Events

- **Upcoming Result's:-** Aster DM Healthcare Ltd, Avanti Feeds Ltd., Bharat Electronics Ltd., GE Power India Ltd., Jindal Worldwide Ltd., NMDC Ltd.

Global Events

- The U.S. Existing Home Sales for May 2021.
- Euro Area Consumer Confidence Flash for June 2021.

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