



The Nifty ended 0.66% up at 15,790.40. It opened on a flat note and remained range-bound with a positive bias towards finishing off in green. However, breaking out thick resistance placed 15,800-15,850 still remains a major challenge. Downside immediate support is placed around 15,600 levels.

On the Nifty hourly chart, direction of the leading indicators suggests range-bound oscillation within the price band of 15,850-15,600 levels.

Nifty patterns on multiple periods suggest; this pullback may face tough resistance in the price range of 15,800-15,850. Failing to breakout may lead to retracement towards 15,600 levels.

Nifty Crucial Supports & Resistances-

Supports- 15600, 15450 Resistances- 15800, 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

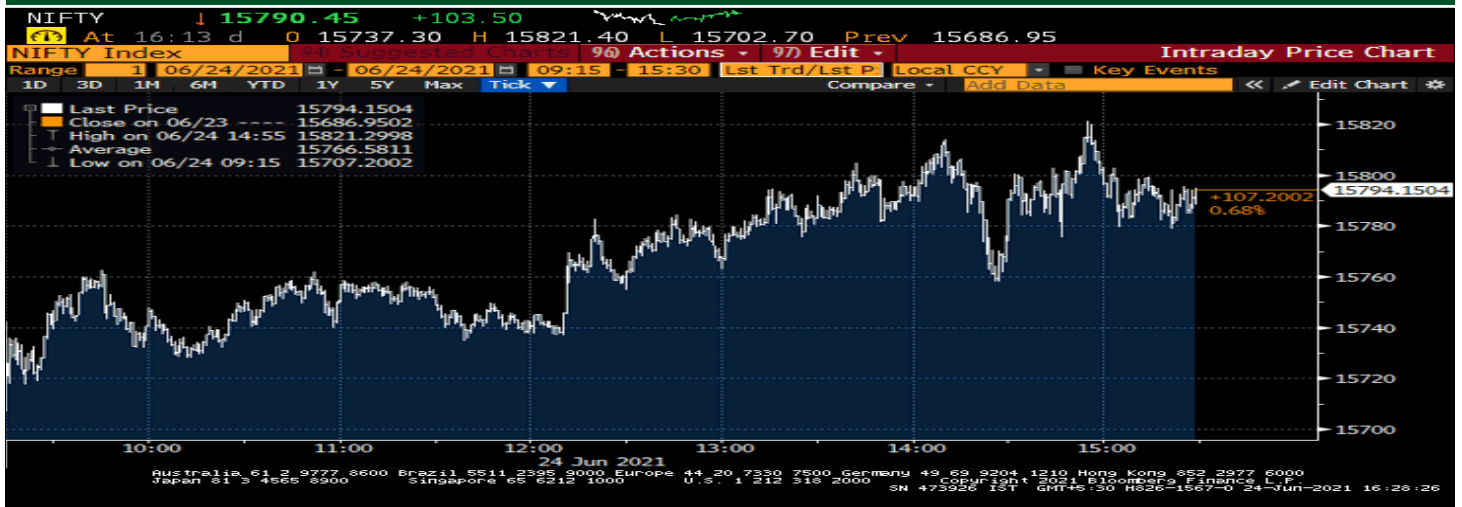
T+5 Positional Sell-
|Futures Segment| SBIN Fut @ 419-
420, TGT- 400, SL- above 430

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

T+2 Positional Sell-
|Futures Segment| HDFC BANK Fut
@ 1495-1500, TGT- 1460, SL- above
1520

Key Contents	Page No.
Result Update	4
Domestic News	5

Nifty Intraday Chart



Market in Retrospect

Nifty index ended 0.66% higher at 15,790. The broader markets represented by the NIFTY 500 Index ended 0.33% higher, ending at 13,468. Among the sectorial indices, NIFTY IT was the top gainer, gaining by 2.79%, followed by NIFTY Service which was gaining by 1.17%. NIFTY PSU Bank was the top loser, losing by 1.40%

Infosys was the top gainer, gaining by 3.73%, followed by TCS and Tech Mahindra which gained by 3.44% & 2.23% respectively. RIL was the top loser, losing by 2.35%, followed by Coal India and IOCL which fell by 1.38% & 1.28% respectively.

The Advance : Decline ratio stood at 778:1184

Market Turnover (In Crore) 24-06-2021

Name	Last	Previous
NSE Cash	63543.48	64039.1
NSE F&O	8099901.37	5270239.12
BSE Cash	4,428.79	12,927.63
BSE F&O	*NA	109.96

FII Derivatives Flow (In Crore) 23-06-2021*

Instrument	Purchase	Sale	Net
Index Future	5830.41	5457.98	372.43
Index Option	562160.71	559038.68	3122.03
Stock Future	38464.92	37985.94	478.98
Stock Option	8377.24	8498.96	121.72

Institutional Flow (In Crore) 23-06-2021*

Institution	Purchase	Sale	Net
FII	13648.63	10492.10	3156.53
DII	4982.56	3665.36	1317.20

*Data not updated till 5:45pm

NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Infosys	3.73	4.27	10785137	7724730
TCS	3.44	1.68	4155204	1992041
Tech Mahindra	2.23	0.02	3617010	3040190
JSW Steel	2.03	2.49	6985183	7758004
Asian Paints	1.87	0.56	985596	1351292

NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Bharti Airtel	0.99	0.02	6301610	8802708
ONGC	1.09	2.48	24358397	33463010
IOCL	1.28	2.75	7991737	11689250
Coal India	1.38	3.78	12929173	15224680
RIL	2.35	2.81	42209687	8014159

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	52699.00	392.92	0.75	0.72	4.04	7.15	51.13
Nifty	15790.45	103.50	0.66	0.63	3.90	8.53	53.23
BSE M Cap	22320.39	114.26	0.51	0.34	3.00	11.10	69.86
BSE S Cap	24896.86	55.76	0.22	0.11	6.89	21.80	99.00
Nifty MC 100	26601.45	74.40	0.28	0.65	3.98	14.00	79.62
BSE Auto	23751.91	65.23	0.28	0.76	2.46	5.95	55.26
BSE Capgoods	22806.64	123.00	0.54	1.96	1.88	9.29	73.85
BSE FMCG	13533.47	33.24	0.25	0.43	4.86	7.88	22.72
BSE Metal	18195.89	128.59	0.71	1.27	1.81	35.04	146.29
BSE Oil&Gas	16677.25	297.78	1.75	2.85	3.75	11.67	29.83
BSE Healthcare	24800.86	73.54	0.30	0.39	0.79	18.96	51.03
BSE Power	2812.21	31.39	1.10	1.01	2.31	10.58	74.32
BSE Realty	2750.86	21.90	0.79	0.60	6.28	4.06	65.33
BSE ConsDur	35886.00	109.04	0.30	1.82	10.10	12.92	74.44
BSE Bank	39427.30	297.56	0.76	0.41	0.50	5.17	62.28
BSE IT	29875.51	846.44	2.92	2.19	11.82	13.99	104.31

Bond Markets

Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	1.49	0.01	0.57	0.69	6.72	7.14	119.97
UK	0.78	0.00	0.13	0.39	3.95	2.77	312.17
Brazil	3.70	0.02	0.51	1.28	4.14	10.67	24.88
Japan	0.06	0.00	0.00	11.11	30.00	23.29	273.33
Australia	1.57	0.01	0.32	4.81	7.89	5.38	69.56
India	6.01	0.01	0.10	0.08	0.67	2.28	1.59
Switzerland	0.19	0.01	2.62	9.27	26.53	36.08	51.81
Germany	0.17	0.01	5.62	13.85	20.00	52.41	61.82

Currency

Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	74.17	0.11	0.15	0.12	1.62	2.17	2.10
USD Index	91.67	0.13	0.14	0.24	2.03	0.93	5.64
YUAN	6.47	0.01	0.11	0.29	0.74	0.89	9.45
GBP	1.40	0.00	0.05	0.35	1.31	2.08	12.50
EUR	1.19	0.00	0.16	0.32	2.22	1.12	6.17
YEN	110.79	0.17	0.15	0.52	1.84	1.86	3.38

Freight

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	3147.00	28.00	0.90	0.91	9.23	43.44	84.57
Baltic Dirty	621.00	6.00	0.98	5.61	1.31	16.42	35.29
SG Dubai HY	0.48	0.06	14.29	36.84	36.84	223.08	152.63

Global Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	33945.58	68.61	0.20	1.03	0.77	4.70	29.78
Nasdaq	14253.27	111.79	0.79	1.28	5.81	7.75	40.68
S&P 500	4246.44	21.65	0.51	0.00	2.18	8.59	35.61
FTSE100	7113.54	22.39	0.32	1.01	1.34	6.17	12.54
CAC40	6585.77	26.93	0.41	1.02	3.10	10.75	31.23
DAX	15555.99	81.94	0.52	0.99	0.76	6.09	24.20
Mexico IPC	50129.88	185.81	0.37	1.53	0.71	7.44	31.17
Brazil Bovespa	128767.4	497.50	0.38	1.02	5.04	13.69	34.17
Russian RTS	1657.27	12.03	0.73	1.27	5.61	15.46	29.38
Japan Nikkei	28874.89	9.24	0.03	1.42	1.97	0.42	28.05
Hang Seng	28817.07	507.31	1.79	1.34	1.26	1.12	15.70
Taiwan Index	17336.71	261.16	1.53	0.17	6.35	7.16	49.30
Shanghai Comp	3566.22	8.81	0.25	1.36	2.28	4.53	20.05
KOSPI	3276.19	12.31	0.38	0.08	3.79	9.03	53.72
Malaysia KLCI	1564.76	9.26	0.59	0.86	0.17	1.91	3.83
Jakarta Comp	6034.54	53.30	0.88	0.72	4.53	3.49	23.68
Philippine SE	6918.41	48.00	0.70	0.79	11.60	7.32	9.85
Thai Exch	1592.08	7.15	0.45	2.01	2.55	1.78	17.37

Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	73.00	0.06	0.08	2.79	10.55	19.35	92.11
BRENT Crude	75.11	0.07	0.09	2.79	9.87	18.37	75.35
Natural Gas	3.34	0.01	0.18	2.64	12.80	24.08	32.97

LME

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1782.33	3.64	0.20	0.50	5.25	2.75	1.20
Silver(\$/Ounce)	26.00	0.11	0.41	0.36	6.38	3.60	48.55
Aluminium	2413.25	16.00	0.67	2.41	3.14	10.21	53.15
Copper	9452.50	177.90	1.92	1.93	4.21	5.27	60.43
Zinc	2878.10	29.35	1.03	4.48	2.72	1.87	41.48
Lead	2179.75	15.22	0.70	0.26	0.63	13.47	25.87

Agro Commodities

Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	152.80	1.10	0.71	0.79	1.19	17.09	43.88
Cotton	86.89	0.05	0.06	3.37	4.32	8.10	46.80
Sugar	16.91	0.10	0.59	1.20	0.41	10.45	40.80
Wheat	654.50	9.25	1.39	1.79	1.69	5.82	26.23
Soybean	1285.00	15.25	1.17	2.57	5.67	4.62	47.28

Apollo Hospitals Enterprise Ltd

- Q4FY21/FY21 Consolidated Revenue from Operations was INR2868 cr (-1.9% YoY) and INR10560 cr (-6.1% YoY) respectively.
- Q4FY21/FY21 Consolidated EBITDA was INR412 cr (+8.4% YoY) and INR1137 cr (-28.3% YoY) respectively.
- Q4FY21/FY21 Consolidated EBITDA margin was 14.4% (+140bps YoY) and 10.8% (-330bps YoY) respectively.
- Q4FY21/FY21 Healthcare segment Revenue was INR1542 cr (+10% YoY) and INR5023 cr (-12.6% YoY).
- Q4FY21/FY21 Pharmacy Distribution Revenue was INR1119 cr and INR2606 cr respectively. Pharmacy Distribution segment did not exist in Q4FY20. Retail Pharmacy segment (currently discontinued) reported Revenue of INR1359 cr in Q4FY20, INR2270 cr in FY21 and INR4821 cr in FY20.
- Q4FY21/FY21 AHLL Revenue was INR211 cr (+25.8% YoY) and INR682 cr (-2% YoY).
- Q4FY21/FY21 Healthcare segment EBIT was INR216 cr (+57% YoY) and INR288 cr (-59% YoY) respectively. Q4FY21/FY21 Healthcare segment EBIT margin was 14.03% (+423 bps YoY) and 5.7% (-650bps YoY) respectively.
- Pharmacy Distribution segment reported an EBIT of INR50 cr in Q4FY21. EBIT margin for Q4FY21 was 4.5%.
- AHLL reported an EBIT of INR7.7 cr in Q4FY21 as against an EBIT of INR(6.61) cr in Q4FY20. FY21 EBIT was INR(10.69) cr against an EBIT of INR(21.86) cr in FY20.
- Q4FY21/FY21 Net Profit was INR168 cr (-23.5% YoY) and INR150 cr (-66.9% YoY) respectively.
- Of the 8816 owned hospital beds capacity, 7409 beds were operational and had an occupancy of 63% in Q4FY21 and 55% in FY21.
- Q4FY21 occupancy across the group was at 4631 beds (63% occupancy) as compared to 4658 beds (63% occupancy) in Q3FY21. The Q4FY21 occupancy in mature hospitals was at 3365 beds (64% occupancy). New hospitals had an occupancy of 1266 beds (60% occupancy) in Q4FY21.
- Inpatient Volumes across the group increased by 9% QoQ from 99197 to 108169.
- ARPOB registered a growth of 11% in Q4FY21 as compared to the previous year.
- The total number of pharmacies as on Mar 31, 2021 was 4118. Gross additions of 144 stores with 26 stores closed; Net addition of 118 stores in Q4FY21 & 352 stores in FY21.
- The Company has announced a re-organization through the slump sale of identified business undertaking including a) AHEL's back-end offline pharmacy business (excluding hospital-based pharmacies), b) AHEL's digital healthcare platform Apollo 24/7, c) AHEL's investment in retail pharmacy business (Apollo Medicals Private Ltd), and d) the "Apollo 24/7" brand, the "Apollo Pharmacy" brand and private label brands into AHEL's 100% subsidiary Apollo HealthCo Limited .

Allcargo Logistics

Allcargo Logistics reported consolidated net profit tanked 89.1% to INR5.91 crore on 79% jump in net sales to INR3,349.31 crore in Q4 March 2021 over Q4 March 2020. Profit before tax slumped 76.2% to INR15.52 crore in Q4 FY21 as against INR65.25 crore in Q4 FY20. Revenue from Multimodal Transport Operations jumped 60.90% to INR2,723.89 crore in Q4 March 2021 from INR1,692.88 crore in Q4 March 2020. Revenue from Container Freight Station Operations climbed 31.41% to INR131.35 crore in Q4 March 2021 as against INR99.95 crore in Q4 March 2020. Revenue from Express Distribution stood at INR406.63 crore in Q4 March 2021. During the financial year, Allcargo Logistics' consolidated net profit tumbled 59.41% to INR95.11 crore on 42.90% increase in revenue from operations to INR10,498.10 crore in FY 2021 over FY 2020.

Nirlon

Net profit of Nirlon declined 2.15% to INR28.73 crore in the quarter ended March 2021 as against INR29.36 crore during the previous quarter ended March 2020. Sales declined 6.29% to INR77.03 crore in the quarter ended March 2021 as against INR82.20 crore during the previous quarter ended March 2020. For the full year, net profit rose 16.37% to INR127.40 crore in the year ended March 2021 as against INR109.48 crore during the previous year ended March 2020. Sales rose 2.23% to INR316.91 crore in the year ended March 2021 as against INR310.00 crore during the previous year ended March 2020.

West Coast Paper Mills

Net profit of West Coast Paper Mills declined 37.53% to INR74.92 crore in the quarter ended March 2021 as against INR119.93 crore during the previous quarter ended March 2020. Sales rose 26.14% to INR937.03 crore in the quarter ended March 2021 as against INR742.87 crore during the previous quarter ended March 2020. For the full year, net loss reported to INR3.10 crore in the year ended March 2021 as against net profit of INR370.38 crore during the previous year ended March 2020. Sales declined 9.96% to INR2244.53 crore in the year ended March 2021 as against INR2492.85 crore during the previous year ended March 2020.

Ambani announces JioPhone Next, the 'most affordable smartphone in the world'; powered by Google

Mukesh Ambani announced a new JioPhone, the JioPhone Next - 'the most affordable smartphone not only in India, but also worldwide'. It will be available in the market from Ganesh Chaturthi, 10th September. Neither company leader disclosed a price for the handset. It is built for India and it will open up new possibilities for millions of new users who will experience the internet for first time. A new 5G partnership between Google Cloud and Jio will help Indians connect to a faster internet, support businesses in digital transformation and lay foundation for next phase of India's digitization.

Ambani announces INR75,000 cr investment in clean energy

Billionaire Mukesh Ambani announced a INR75,000 crore investment in setting up four 'Giga' factories to make solar photovoltaic cells, green hydrogen, batteries and fuel cells over the next three years. Reliance will set up 100 GW of solar power generating capacity. Company will invest an additional INR15,000 crore in the value chain, partnerships and future technologies, including upstream and downstream industries. Thus, our overall investment in the new energy business will be INR75,000 crore in 3 years. Last year, company announced a 15-year commitment to become net carbon zero by 2035.

Adani Group strikes coal at Carmichael project in Australia

Adani Group's Australian business Bravus struck coal and exposed the first of coal seams at the Carmichael project in Queensland, it said on Thursday. Bravus is on track to export its first coal this year as promised. It was an exciting day for 2,600-plus people on the project, a day that has been in the making for over a decade. India will be a foundation customer for the Carmichael mine and is the fourth largest global user of electricity as well as the source of the biggest growth in global energy demand. Carmichael coal will add to Adani Group's growing energy portfolio designed to create a 'sustainable energy mix, incorporating, thermal power, solar power, wind power and gas. Bravus has already secured the market for 10 million tonnes per annum of coal produced at Carmichael mine.

Zydus Cadila gets tentative USFDA nod to market generic sclerosis treatment drug

Zydus Cadila on Thursday said it has received tentative approval from the US health regulator to market Fingolimod capsules, used in the treatment of multiple sclerosis, in the American market. The company has received tentative approval from the US Food and Drug Administration (USFDA) to market the product in the strength of 0.25 mg. Earlier, in October 2020, the Ahmedabad-based group had received approval to market the Fingolimod capsules in the strength of .5mg. Fingolimod is an immunomodulation drug. It is a sphingosine 1-phosphate receptor modulator indicated for the treatment of relapsing forms of multiple sclerosis (MS). The drug will be manufactured at the Zydus's manufacturing facility at the SEZ, Ahmedabad. The group now has 319 approvals and has so far filed over 400 abbreviated new drug applications (ANDAs) since the commencement of the filing process in 2003-04.

Mankind Pharma inks distribution pact with BDR Pharmaceuticals for COVID drug

Mankind Pharma on Thursday said it has inked a pact with BDR Pharmaceuticals for distributing Baricitinib, a drug that is used in COVID treatment. The product, which would be sold under the BARIKIND trademark, has received restricted emergency use approval for use in combination with remdesivir in the treatment of COVID. Under the partnership, BDR Pharma will be manufacturing and marketing the product under a royalty free, limited and non-exclusive voluntary license from Eli Lilly and Company. Mankind Pharma will be distributing the same. Eli Lilly has received the permission for restricted emergency use from the Central Drugs Standard Control Organization, a division of Ministry of Health.

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

Company	Details
Vimta Labs Ltd	Cash dividend of INR2 effective 25-06-2021
Supreme Petrochem Ltd	Cash dividend of INR12.50 effective 25-06-2021
Panacea Biotech Ltd	Corporate meeting effective 25-06-2021
Tejas Networks Ltd	Corporate meeting effective 25-06-2021
SIS Ltd	Corporate meeting effective 25-06-2021
Tata Consumer Products Ltd	Corporate meeting effective 25-06-2021
Raghav Productivity Enhancers Ltd	Corporate meeting effective 25-06-2021
Craftsman Automation Ltd	Corporate meeting effective 25-06-2021
ICICI Prudential Life Insurance Co Ltd	Corporate meeting effective 25-06-2021
Tata Elxsi Ltd	Corporate meeting effective 25-06-2021
State Bank of India	Corporate meeting effective 25-06-2021
Quint Digital Media Ltd	Corporate meeting effective 25-06-2021
Insilco Ltd	Corporate meeting effective 25-06-2021
Kansai Nerolac Paints Ltd	Corporate meeting effective 25-06-2021

Domestic Events

- **Upcoming Result's:-** Alchemist Corporation Ltd., Apex Frozen Foods Ltd., Atul Auto Ltd., Balmer Lawrie & Co.Ltd., Finolex Industries Ltd., Godfrey Phillips India Ltd., HCL Infosystems Ltd., Hindustan Copper Ltd., Hindustan Tin Works Ltd., India Glycols Ltd., Indraprastha Gas Ltd., Inox Wind Ltd., JSW Energy Ltd., Maharashtra Seamless Ltd., Voltamp Transformers Ltd.
- India Foreign Exchange Reserve for June 18, 2021.

Global Events

- The U.S. Personal Income and Personal Spending for May 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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