



The Nifty ended 0.17% down at 15,721.50. It opened on a flat note and got sold off from day's high 15,839 towards ending the day with a bearish body candle. Ending the day before the weekly expiry on a bearish note with a shooting star candle is worrisome. Chart pattern suggests, weakness is likely to persist as long as it trades below 15,900. Failing to hold immediate support placed around 15,700 levels may lead to further decline towards 15,600 levels.

On the Nifty hourly chart, direction of the leading indicators suggests range-bound oscillation within the price band of 15,900-15,600 levels. Midway support is placed around 15,700 levels.

Nifty patterns on multiple periods suggest; it ended the day with a bearish candle for the third consecutive session. The Nifty failing to breakout 15,900 still remains a major challenge. Immediate pivotal support is placed around 15,600.

Nifty Crucial Supports & Resistances-

Supports- 15700, 15600 Resistances- 15850, 15900

Open Positional Calls-

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

T+5 Positional Buy-
|Cash Segment| GLENMARK on dips around @ 665-660, TGT- 700, SL- closing below 640

Key Contents	Page No.
Result Update	4
Domestic News	6

Nifty Intraday Chart



Market in Retrospect

India stocks declined for a third day as investors booked profit after key benchmarks closed at record levels last week.

Nifty index ended 0.17% lower at 15,722. The broader markets represented by the NIFTY 500 Index ended 0.06% lower, ending at 13,474. Among the sectorial indices, NIFTY IT was the top gainer, gaining by 0.63%, followed by NIFTY MNC which was gaining by 0.17%. NIFTY Bank was the top loser, losing by 0.68%

Coal India was the top gainer, gaining by 1.49%, followed by Divi's Laboratories and Infosys gained by 1.20% & 1.14% respectively. Shree Cement was the top loser, losing by 2.24%, followed by UPL and Bajaj Finserv which fell by 1.56% & 1.55% respectively.

The Advance : Decline ratio stood at 961:1018

Market Turnover (In Crore) 30-06-2021

Name	Last	Previous
NSE Cash	*NA	63114.33
NSE F&O	*NA	3464779.35
BSE Cash	5,628.80	13,508.38
BSE F&O	*NA	95.07

FII Derivatives Flow (In Crore) 29-06-2021*

Instrument	Purchase	Sale	Net
Index Future	2329.52	3630.34	1300.82
Index Option	283451.42	278774.48	4676.94
Stock Future	11353.93	12530.68	1176.75
Stock Option	8551.18	8789.45	238.27

Institutional Flow (In Crore) 29-06-2021*

Institution	Purchase	Sale	Net
FII	10932.02	10815.39	116.63
DII	8687.31	6877.26	1810.05

*Data not update till 5:30pm

NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Coal India	1.49	1.21	12919448	11621400
Divi'S Laboratories	1.20	4.35	636015	344591
Infosys	1.14	5.17	6058722	7405586
RIL	1.09	4.29	9120556	19465330
SBI Life Insurance	0.88	0.76	777901	1461966

NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
ICICI Bank	1.44	0.99	14276494	12574250
Power Grid	1.53	0.06	9808734	11531360
Bajaj Finserv	1.55	1.41	231546	239708
UPL	1.56	1.39	2180444	3328763
Shree Cement	2.24	4.72	55961	23056

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	52482.71	66.95	0.13	0.34	1.05	6.01	50.31
Nifty	15721.50	26.95	0.17	0.22	0.89	7.02	52.60
BSE M Cap	22535.95	6.85	0.03	0.45	3.57	11.67	72.62
BSE S Cap	25232.17	139.48	0.56	1.12	6.93	22.19	103.80
Nifty MC 100	26970.75	69.65	0.26	1.11	4.64	13.83	83.42
BSE Auto	23771.76	29.29	0.12	0.36	0.98	6.83	55.62
BSE Capgoods	22948.98	72.01	0.31	1.17	2.00	8.78	78.47
BSE FMCG	13517.95	52.50	0.39	0.13	2.95	4.99	20.07
BSE Metal	18664.75	21.29	0.11	3.31	1.13	30.06	158.87
BSE Oil&Gas	16175.51	81.52	0.50	4.71	1.80	9.14	27.69
BSE Healthcare	25589.02	40.71	0.16	2.87	4.30	19.98	57.35
BSE Power	2755.48	25.33	0.91	3.10	2.16	11.33	74.97
BSE Realty	2740.68	11.71	0.43	1.16	2.26	2.64	73.30
BSE ConsDur	35575.43	92.37	0.26	1.17	6.55	8.38	74.92
BSE Bank	39349.98	243.05	0.61	0.56	2.47	4.80	61.98
BSE IT	30135.93	260.81	0.87	3.81	9.25	13.54	102.43

Bond Markets							
Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	1.45	0.02	1.15	2.18	8.88	14.69	121.43
UK	0.72	0.02	2.98	8.21	9.94	13.11	316.28
Brazil	3.71	0.03	0.71	0.19	0.88	13.95	24.71
Japan	0.06	0.00	6.45	3.57	30.12	36.26	107.14
Australia	1.53	0.01	0.59	1.92	9.41	14.09	75.86
India	6.05	0.02	0.25	0.37	0.78	1.56	2.80
Switzerland	0.21	0.02	11.83	8.90	42.47	18.43	52.51
Germany	0.20	0.03	14.71	9.55	6.56	31.82	57.05

Currency							
Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	74.33	0.10	0.13	0.07	2.31	1.64	1.58
USD Index	92.08	0.03	0.04	0.31	2.28	1.23	5.45
YUAN	6.46	0.01	0.09	0.26	1.36	1.47	9.39
GBP	1.39	0.00	0.18	0.74	2.47	0.57	11.77
EUR	1.19	0.00	0.07	0.31	2.76	1.36	5.83
YEN	110.49	0.04	0.04	0.43	0.82	0.21	2.32

Freight							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	3418.00	94.00	2.83	9.59	31.66	67.06	89.99
Baltic Dirty	605.00	9.00	1.47	2.58	0.17	14.79	30.95
SG Dubai HY	0.34	0.03	8.11	19.05	57.50	241.67	197.14

Global Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	34292.29	9.02	0.03	1.02	0.69	3.97	32.85
Nasdaq	14528.34	27.82	0.19	1.93	5.67	9.67	44.43
S&P 500	4291.80	1.19	0.03	1.07	2.09	8.03	38.43
FTSE100	7046.62	40.37	0.57	0.38	0.35	4.97	14.22
CAC40	6514.78	52.16	0.79	0.55	1.06	7.38	32.00
DAX	15539.38	148.38	0.95	0.56	0.79	3.56	26.25
Mexico IPC	50337.36	13.85	0.03	0.41	1.08	6.54	33.46
Brazil Bovespa	127327.4	101.80	0.08	1.12	0.88	9.17	33.95
Russian RTS	1639.29	1.05	0.06	1.63	2.60	10.96	35.16
Japan Nikkei	28791.53	21.08	0.07	0.29	0.24	1.33	29.18
Hang Seng	28827.95	166.15	0.57	0.04	1.11	1.58	18.02
Taiwan Index	17755.46	157.27	0.89	2.42	4.03	8.06	52.78
Shanghai Comp	3591.20	18.02	0.50	0.70	0.67	4.34	20.32
KOSPI	3296.68	10.00	0.30	0.63	2.90	7.68	56.36
Malaysia KLCI	1532.63	15.68	1.01	2.05	3.22	2.60	2.11
Jakarta Comp	5985.49	36.44	0.61	0.81	0.64	0.00	22.02
Philippine SE	6901.91	54.74	0.79	0.24	4.12	7.12	11.18
Thai Exch	1587.79	3.64	0.23	0.27	0.36	0.04	18.58

Indian Indices							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	73.83	0.85	1.16	1.03	11.32	24.80	88.01
BRENT Crude	75.23	0.47	0.63	0.05	8.53	21.50	73.10
Natural Gas	3.70	0.07	1.93	10.38	23.05	34.40	45.55

LME							
Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1758.06	3.27	0.19	1.16	7.81	2.94	1.29
Silver(\$/Ounce)	25.82	0.05	0.18	0.28	7.87	5.74	41.81
Aluminium	2538.00	65.75	2.66	5.87	3.23	13.19	59.67
Copper	9312.25	49.00	0.52	0.41	9.13	5.03	56.47
Zinc	2949.50	59.25	2.05	3.54	3.09	4.76	43.58
Lead	2334.50	84.50	3.76	7.85	6.29	20.88	30.29

Agro Commodities							
Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	160.85	0.65	0.41	4.52	2.10	26.36	48.04
Cotton	87.44	0.14	0.16	0.58	4.94	9.16	45.06
Sugar	17.56	0.02	0.11	3.23	0.98	18.81	47.32
Wheat	644.25	2.00	0.31	2.94	3.45	4.37	23.89
Soybean	1307.00	5.50	0.42	0.52	4.79	4.04	49.84

Balmer Lawrie Investment

Net profit of Balmer Lawrie Investment declined 13.19% to INR1.25 crore in the quarter ended March 2021 as against INR1.44 crore during the previous quarter ended March 2020. Sales declined 30.13% to INR1.60 crore in the quarter ended March 2021 as against INR2.29 crore during the previous quarter ended March 2020. For the full year, net profit rose 1.24% to INR84.62 crore in the year ended March 2021 as against INR83.58 crore during the previous year ended March 2020. Sales rose 0.01% to INR86.90 crore in the year ended March 2021 as against INR86.89 crore during the previous year ended March 2020.

DCM Shriram Industries

DCM Shriram Industries reported total income of INR522.70 crores during the period ended March 31, 2021 as compared to INR495.20 crores during the period ended December 31, 2020. The company has posted net profit / (loss) of INR19.51 crores for the period ended March 31, 2021 as against net profit / (loss) of INR15.65 crores for the period ended December 31, 2020. The company has reported EPS of INR11.21 for the period ended March 31, 2021 as compared to INR9 for the period ended December 31, 2020.

EID-Parry

EID-Parry (India) lost 3.76% to INR429 after the company's consolidated net profit tanked 75.4% to INR61.61 crore on 7.9% fall in net sales to INR3,907.96 crore in Q4 March 2021 over Q4 March 2020. Profit before tax tumbled 59.3% to INR185.70 crore in Q4 FY21 as against INR455.93 crore in Q4 FY20. EBITDA for the quarter ended 31 March 2021 at INR321 crore as against the corresponding quarter of previous year at INR639 crore. The consolidated sugar operations reported an operating loss of INR21 crore as compared to the corresponding quarter of previous year, where profit stood at INR170 crore. The consolidated Farm Inputs operations reported an operating profit of INR265 crore as against the corresponding quarter of previous year, where profit was at INR372 crore. The consolidated Nutraceuticals division reported an operating profit of INR19 crore over the corresponding quarter of previous year profit of INR4 crore. During the financial year, EID-Parry (India)'s consolidated net profit jumped 12.48% to INR999.82 crore on 8.51% increase in revenue from operations to INR18,587.45 crore in FY 2021 over FY 2020.

Gallantt Metal

Gallantt Metal reported total income of INR355.38 crores during the period ended March 31, 2021 as compared to INR207.66 crores during the period ended December 31, 2020. The company has posted net profit / (loss) of INR37.93 crores for the period ended March 31, 2021 as against net profit / (loss) of INR7.41 crores for the period ended December 31, 2020. The company has reported EPS of INR4.67 for the period ended March 31, 2021 as compared to INR0.91 for the period ended December 31, 2020.

HUDCO

HUDCO Ltd reported -6.84% lower consolidated revenues for the Mar-21 quarter at INR1,759.38cr. On a sequential basis, net sales revenues were down -4.65% compared to total revenues in the Dec-20 quarter at INR1,845.19cr. Full year revenues for FY21 were -3.9% lower at INR7,235cr. The interest income for the quarter was lower on a yoy basis by almost 7% on account of lower cost of funds being passed on to the end customers and surplus liquidity in the system. Net profits in the Mar-21 quarter was higher by 19.36% at INR526.38cr. This was on the back of writeback of provisions previously made towards impairment of loan assets. The fall in the interest costs were just about marginal on a yoy basis and employee costs were also lower. Net margins for the Mar-21 quarter at 29.91% was better than 23.35% in the Mar-20 quarter as well as better than 21.22% net margins in the sequential Dec-20 quarter. HUDCO declared a final dividend of INR1.425 per share taking the total dividend for FY21 to INR2.125.

NBCC India

NBCC India Limited reported PAT at INR79.64cr in the fourth quarter ended March 31, 2021, compared to INR78.98cr during the same quarter last year. Yearly PAT rose to INR221.80cr in FY21 compared to INR78.23cr in FY20. The company's net sales rose to INR2,624.68cr in Q4FY21 compared to INR2568.73cr in Q4FY20. During FY21, net sales declined to INR6,739.94cr compared to INR8,027.50cr in FY20. The company board has recommended the final Dividend of INR0.47 per paid up equity share of INR1 each i.e. 47% for the FY21

Ruchi Soya Industries

Ruchi Soya Industries Ltd reported a net profit of INR314.33 crore for the quarter ended March 2021. The company had posted a net loss of INR41.24 crore in the year-ago period. Total income rose to INR4,859.5 crore in the fourth quarter of 2020-21 from INR3,209.02 crore earlier. For the full fiscal 2020-21, Ruchi Soya's net profit declined to INR680.77 crore from INR7,672 crore in 2019-20. Total income increased to INR16,382.97 crore in the 2020-21 fiscal from INR13,175.36 crore in the previous year. The branded business vertical registered a growth of 14.53% on q-o-q and 49.47% on y-o-y basis.

Gujarat Mineral Development Corporation

Net loss of Gujarat Mineral Development Corporation reported to INR184.64 crore in the quarter ended March 2021 as against net profit of INR12.30 crore during the previous quarter ended March 2020. Sales rose 37.33% to INR565.81 crore in the quarter ended March 2021 as against INR412.02 crore during the previous quarter ended March 2020. For the full year, net loss reported to INR39.34 crore in the year ended March 2021 as against net profit of INR146.49 crore during the previous year ended March 2020. Sales declined 11.95% to INR1339.24 crore in the year ended March 2021 as against INR1520.95 crore during the previous year ended March 2020.

Rs 3.03 lakh crore power reforms scheme cleared by Cabinet

The Union Cabinet cleared a Rs 3.03 lakh crore scheme under which state power distribution companies will receive grants each year only if they achieve the milestones agreed for the previous fiscal. As per the five-year programme, reforms-based, result-linked scheme for financial assistance to discoms if a utility is found ineligible any year, then the gap in funding to complete its projects will have to be met by the discom or its state government.

Tata Motors bags order for 15 hydrogen fuel cell bus from Indian Oil Corporation

Even as the push towards electrification gains momentum, Tata Motors India's largest commercial vehicle maker has bagged an order of 15 hydrogen based fuel cell buses from Indian Oil Corporation Ltd. The buses will be used to evaluate the potential of developing hydrogen-based PEM Fuel Cell Technology in India. IOCL had invited bids for supply of PEM fuel cell buses in December 2020.

Cabinet approves Rs 19,041 cr viability gap funding for BharatNet in 16 states

The Cabinet on Wednesday approved public private partnership mode for the rollout of BharatNet project for broadband services in villages in 16 states with viability gap funding of Rs 19,041 crore. The total expense will be Rs 29,430 crore to cover around 3,60,000 villages in the 16 states, which includes Rs 19,041 crore to be spent by the government for the viability gap funding. The decision to involve private players was taken after Prime Minister Narendra Modi announced on August 15, 2020 that around 6 lakh villages in the country will be connected with broadband in 1,000 days.

Lupin gets USFDA nod for HIV drug under PEPFAR

Lupin has received approval from the US health regulator to market HIV treatment medication in the American market. The Mumbai-based company has received tentative nod from the US Food and Drug Administration (USFDA) under the US President's Emergency Plan for AIDS Relief (PEPFAR) for its new drug application (NDA) for Dolutegravir, Lamivudine and Tenofovir Disoproxil Fumarate (TLD) tablets (50 mg/300 mg/300 mg), along with antiretroviral fixed dose combination. The product would be manufactured at the company's Nagpur-based facility. TLD tablets are recommended by the World Health Organisation (WHO), the US Agency for International Development (USAID), and PEPFAR as a preferred first-line treatment regimen for the treatment of HIV in adults and pediatric patients weighing at least 35 kg.

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

Company	Details
Swaraj Engines Ltd	Cash dividend of INR50 effective 01-07-2019
TTK Prestige Ltd	Cash dividend of INR30 effective 01-07-2019
Larsen & Toubro Infotech Ltd	Cash dividend of INR25 effective 01-07-2019
Sundaram Finance Ltd	Cash dividend of INR6 effective 01-07-2019
MM Forgings Ltd	Cash dividend of INR5 effective 01-07-2019
Dhunseri Tea & Industries Ltd/new	Cash dividend of INR5 effective 01-07-2019
Petronet LNG Ltd	Cash dividend of INR3.50 effective 01-07-2019
Smruthi Organics Ltd	Cash dividend of INR3 effective 01-07-2019
PTL Enterprises Ltd	Cash dividend of INR2.50 effective 01-07-2019
Apcotex Industries Ltd	Cash dividend of INR2 effective 01-07-2019
Power Finance Corp Ltd	Cash dividend of INR2 effective 01-07-2019
Adani Enterprises Ltd	Cash dividend of INR1 effective 01-07-2019
Vishnu Chemicals Ltd	Cash dividend of INR1 effective 01-07-2019
Federal Bank Ltd	Cash dividend of INR0.70 effective 01-07-2019

Domestic Events

- India Balance of Trade Prel for June 2021.
- India Markit Manufacturing PMI for June 2021.

Global Events

- China Caixin Manufacturing PMI for June 2021.
- Japan Jibun Bank Manufacturing PMI for June 2021.
- The U.S. ISM Manufacturing PMI for June 2021.
- The U.S. Initial Jobless Claims for June 26, 2021.
- Euro Area Manufacturing PMI for June 2021.
- Euro Area Unemployment Rate 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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