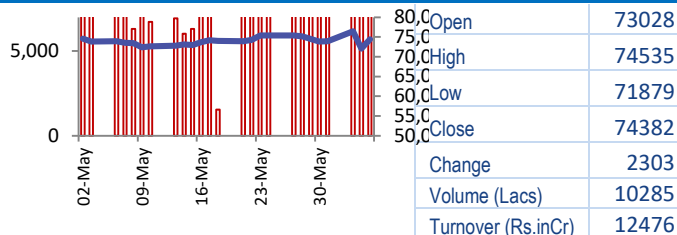
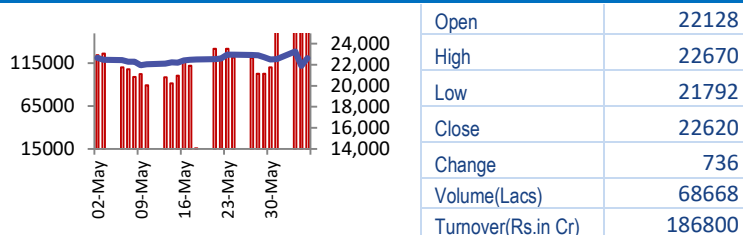


BSE



NSE



World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	38807	38711	96	0.2%
Dow Futures	38897	38884	13	0.0%
Nasdaq	17188	16857	331	2.0%
FTSE	8247	8232	15	0.2%
Nikkei	38842	38490	352	0.9%
Hang Seng	18582	18425	157	0.9%
Gift Nifty	22679	22502	177	0.8%
Straits Singapore	3346	3330	16	0.5%
South Korea	2690	2690	Closed	Closed
Taiwan	21910	21485	425	2.0%
Shanghai	3068	3065	3	0.1%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	9926	9945	(19.0)	-0.2%
Alumin (\$/MT)	2622	2664	(42.0)	-1.6%
Zinc (\$/MT)	2864	2935	(71.0)	-2.4%
Brent Crude (\$/bbl)	79.0	78.0	1.0	1.3%
Gold (\$/Ounce)	2373	2355	18.0	0.8%
Silver (\$/Ounce)	31.0	30.0	1.0	3.3%
Light Crude (\$/bbl)	75.0	74.0	1.0	1.4%
N G (\$/mmbtu)	3.0	3.0	0.0	0.0%
Sugar (\$/MT)	560.0	556.0	4.0	0.7%
Rubber (Rs./kg)	194.5	194.0	0.5	0.3%
Baltic Dry Index	1852	1813	39.0	2.2%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	83.38	83.53	-0.18%
Rs./ Euro	90.68	90.83	-0.17%
Rs./Chinese Yuan	11.51	11.50	0.09%
Yen / \$ rate	155.61	156.11	-0.32%
\$ US/Euro	1.09	1.09	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	105.26	105.28	-0.02%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	22540	48770
Support 2	22430	48500
Resistance	22700	49640

Securities in Ban For Trade
Zeel

Market Review

US: US benchmarks- the S&P 500 and Nasdaq Composite hit new record highs overnight, buoyed by hopes of Fed's rate cutting cycle. Nvidia has surpassed Apple Inc in terms of market capitalisation as it moved past the \$3 trillion mark.

Asia: Asian shares gained on Thursday on rising expectations the U.S. Federal Reserve will likely cut interest rates in September, while the euro advanced ahead of the European Central Bank policy meeting where a rate cut is widely expected.

India: Equity markets staged a smart rebound on Wednesday as investors assessed increased prospects of the Bharatiya Janata Party (BJP)-led National Democratic Alliance (NDA) forming the next government. Besides, reports suggest that Narendra Modi has tendered his resignation for the second term and will take oath as India's prime miniter for a third term on June 8. **Market is expected to open on a gap up and likely to witness positive move during the day.**

Global Economy: Hiring by U.S. private employers slid to a four-month low in May, with small firms reducing staff, and wage gains for job changers moderated for a second month, according to a report on Wednesday that added to signs the job market is cooling. Private payrolls increased by 152,000 jobs last month - the fewest since January and well below the average of 194,000 over the past year - after rising by a downwardly revised 188,000 in April, the ADP Employment report showed. Economists polled by Reuters had forecast private employment increasing by 175,000 last month.

Growth among Britain's services businesses eased in May from April's 11-month high and inflation pressures dropped to their lowest in three years, potentially easing the way for a Bank of England rate cut later this year. The S&P Global UK Services PMI touched a six-month low of 52.9, down from April's 55.0, in line with an earlier provisional reading.

Commodities: Gold prices rose on Thursday, building on the previous session's gains as investors awaited U.S. non-farm payrolls data that could determine whether interest rates will be cut earlier than expected this year.

Oil rose for a second session even as Saudi Arabia signaled concerns over the demand outlook with cuts to its crude prices.

Currency: The euro firmed a touch on Thursday ahead of a policy decision from the ECB where traders consider a rate cut all but certain, while the dollar eased on renewed bets of a U.S. Federal Reserve easing cycle expected this year.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value	Value	Contract	Value	Contract	Value	Contract	Value
Index Future	264443	16607	220671	14096	2511	479219	30894	477013	28850	2206	2044
Index Option	62206662	4260901	61381826	4216920	43981	6452216	380328	7724758	458930	(1272542)	(78602)
Stock Future	773864	57201	748364	55310	1891	3703645	272649	3708141	262060	(4496)	10589
Stock Option	885724	69480	897946	70471	(991)	501403	37499	446975	32105	54428	5394
Total	64130693	4404189	63248807	4356797	47392	11136483	721370	12356887	781945	(1220404)	(60575)

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
29-May-24	15490	19801	(4311)
30-May-24	21864	22986	(1122)
31-May-24	96155	93977	2178
3-Jun-24	23537	16690	6847
4-Jun-24	26736	38980	(12244)
Month to date- June	50273	55670	(5397)
FII (Prov.) (Rs Cr)	Buy	Sell	Net
30-May-24	18109	21159	(3050)
31-May-24	95468	93854	1613
3-Jun-24	23451	16601	6851
4-Jun-24	26776	39212	(12436)
5-Jun-24	21013	26669	(5656)
Month to date-June	71240	82482	(11242)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
30-May-24	13749	10316	3433
31-May-24	21441	19327	2114
3-Jun-24	22651	20737	1914
4-Jun-24	25964	29283	(3319)
5-Jun-24	28615	24060	4555
Month to date-June	77230	74080	3150
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
29-May-24	2508	1071	1437
30-May-24	2112	700	1411
31-May-24	1036	1697	(661)
3-Jun-24	2517	252	2265
4-Jun-24	2986	2123	862
Month to date- June	5503	2376	3127

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	2560	65%	1913	71%
Decline	1261	32%	709	26%
Unchanged	97	2%	70	3%

Market Turnover	05-Jun	04-Jun	Var (%)
BSE Cash	12476	21722	-43%
NSE Cash	186800	271245	-31%
NSE Futures	302468	469935	-36%
NSE Options	60821468	41069603	48%
Total (Rs.Cr)	61323211	41832506	47%

Volatility Index	05-Jun	04-Jun
Volatility Index	18.89	26.75

Index PE - TTM	05-Jun	Yr. High	Yr. Low
Sensex	22.5	26.0	21.8
Nifty	21.5	28.8	20.3

Corporate News

Maruti Suzuki to invest Rs 450 cr in renewable energy initiative

Maruti Suzuki India will invest Rs 450 cr over a span of three years towards commissioning renewable energy projects linked to solar power and biogas. In FY24, the company invested Rs 120.8 cr in the vertical. The company will increase this investment around four-fold to Rs 450 cr spread over three years starting FY25. (BS)

KEC International gets new orders worth over Rs 1,000 crore

KEC International has secured new orders worth over Rs 1,000 cr in the domestic market. The orders include residential projects in northern and southern India from renowned real estate developers. It also includes construction of official residences and associated facilities for defence officials. (FE)

Lupin arm completes acquisition of two brands from Sanofi

Lupin's European arm has completed the acquisition of two brands from Sanofi. Lupin Atlantis Holdings SA has completed the acquisition of Aarane in Germany and Nalcrom in Canada and the Netherlands, along with the associated trademark rights, from Sanofi. (ET)

Economy

Services activity growth eases to 5-month low in May

India's services sector output growth moderated in May, reaching its lowest level in five months, according to the HSBC India Services Business Activity Index. The index slipped to 60.2 from 60.8 in April, indicating a softening in services activities due to factors like severe heat waves and price pressures. (ET)

Expect broad policy continuity with focus on capex: Ratings agencies

Economists emphasize the new Indian govt's need to focus on growth, job creation, fiscal stability, tax reforms, and risk management. Reforms in land, labor, and capital markets are crucial, along with fiscal consolidation and increased government spending to attract private investments. (ET)

International

Costco's May sales rise 8.1%, analysts maintain buy rating

Costco Wholesale Corp reported an increase of 6.5% in same store sales (excluding gas and foreign exchange impacts) for May. This figure exceeded the consensus estimate of 6.0% and showed acceleration from the 5.5% growth reported in April. A significant rise in net sales was also reported, reaching \$19.64 bn, an 8.1% increase compared to the \$18.16 bn reported in the same period last year. (ET)

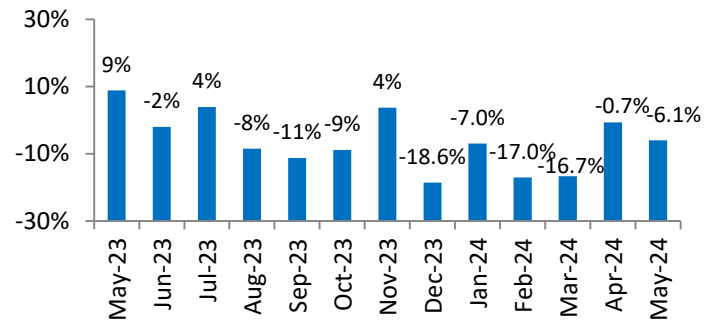
Top 5 Nifty Gainers	05-Jun	04-Jun	Var(%)
ADANI PORTS	1355	1249	8.5%
INDUSINDBK	1501	1392	7.9%
HINDALCO	695	649	7.1%
HEROMOTOCO	5659	5311	6.5%
M&M	2741	2573	6.5%
Top 5 Nifty Losers	05-Jun	04-Jun	Var(%)
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	74382	3.2%	-0.2%	0.7%	18.5%
MIDCAP	42586	4.4%	-1.8%	1.4%	55.1%
SMLCAP	46278	2.9%	-2.7%	-0.9%	48.4%
AUTO	55003	4.5%	2.0%	7.0%	61.9%
BANKEX	55829	4.2%	0.9%	0.5%	11.1%
Capital Goods	65643	1.3%	-5.9%	5.5%	72.0%
FMCG	20648	4.5%	4.4%	4.8%	13.0%
Health Care	35578	3.4%	-0.3%	-0.5%	47.0%
IT	33769	2.5%	-1.3%	-1.0%	17.0%
METAL	32121	5.4%	-3.2%	1.7%	62.9%
Oil & Gas	27362	2.3%	-4.7%	-4.1%	53.4%
Power	7309	2.9%	-4.2%	1.2%	89.4%
Realty	7829	2.5%	-0.3%	0.9%	96.2%

NSE USD Futures	05-Jun	04-Jun	Var (%)
June Expiry (Rs./\$)	83.10	83.10	0.0%
July Expiry (Rs./\$)	83.50	83.50	0.0%
Total Turnover (Rs. Crore)	5158	19655	-74%

Sectors	TTM PE
Auto	32.55
Auto Ancillary	46.15
Banking	15.19
Engineering	40.2
Cement	71.24
Diamonds & Jewellery	57.62
Housing Finance	20.29
Infrastructure & Const	29.11
Metals-Aluminium	40.41
Metal - Steel	18.6
Oil Expl.	16.99
Pharma	9.75
Power – Gen. Supp.	39.01
Information Tech.	24.77
Sugar	18.05
Telecom Serv. Prov.	82.21
Tyres	26.84

Escorts Monthly Volume Growth(YoY) (Source: Company data)



10 year G-Sec Yield	Current	Previous	Change
US	4.29%	4.28%	1 bps
Japan	1.00%	1.02%	(2) bps
India	7.03%	7.04%	(1) bps
UK	4.18%	4.18%	0 bps
Libor 3 Mths	5.60%	5.60%	0 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation - WPI	1.26%	0.53%	73 bps
Inflation - CPI	4.83%	4.85%	(2) bps

India GDP	Q4FY24	Q3FY24	Var(%)
Growth	7.76%	8.57%	(81) bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	494	436	57.6

IIP Growth %	Jan-24	Jan-23	Apr-Feb
IIP	4.9	1.9	6.1
Mining	5.9	9.0	8.5
Manufacturing	3.2	4.5	5.7
Electricity	5.6	12.7	7.0

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	17.15	7513164	16.80	8822761	2.08%	1	1429.95	1430.10	0.0%
Wipro	5.33	2468906	5.19	3122392	2.70%	1	444.41	451.50	-1.6%
Dr.Reddy's	69.53	366271	68.75	182802	1.13%	1	5797.33	5824.15	-0.5%
ICICI Bank	26.67	7754398	25.77	11343990	3.49%	2	1111.86	1108.65	0.3%
HDFC Bank	58.43	4518780	55.51	5316294	5.26%	3	1623.94	1551.80	4.6%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	40.90	41.10	(0.2)	-0.5%
RIL	68.10	67.60	0.5	0.7%
SBI	95.40	94.00	1.4	1.5%

US Economy Data

	Current	Previous
Inflation (%) (YoY)	3.40%	3.50%
Unemployment (%)	3.90%	3.80%

Interest Rate (%)

	Current	Previous
Fed Rate	5.50%	5.50%

US GDP

	Q1CY24	Q4CY23	Q4CY22
Growth (QoQ Annualized)	1.30%	3.40%	2.60%

China Economy Data

	Current	Previous
GDP	5.30%	5.20%
Inflation – CPI (%)	0.30%	0.10%

Economic Calendar

	Date
Indian GDP Data	30 Aug
Indian Inflation Data CPI	12 Jun
Indian Inflation Data WPI	14 Jun
Indian Monetary Policy	07 Jun
India's Industrial Production (IIP)	12 Jun
US Inflation Data	12 Jun
US GDP	27 Jun
US Unemployment Data	07 Jun
US Fed Rate	12 Jun
China GDP	15 Jul
China Inflation Data	12 Jun

Event Update

Name	Date	Purpose
Clara Industries Ltd.	06-06-2024	Rs.0.50 per share(5%)Interim Dividend
Remus Pharmaceuticals Ltd.	06-06-2024	Bonus
Vuenow Infratech Ltd.	06-06-2024	Rs.0.25 per share(2.5%)Interim Dividend
Home First Finance Company India Ltd.	07-06-2024	Rs.3.40 per share(170%)Final Dividend
ICICI Lombard General Insurance Company Ltd.	07-06-2024	Rs.6.00 per share(60%)Final Dividend
Indiamart Intermesh Ltd.	07-06-2024	Rs.20.00 per share(200%)Final Dividend
Richfield Financial Services Ltd.	07-06-2024	Rs.0.80 per share(8%)Interim Dividend
Service Care Ltd.	07-06-2024	Dividend.
The Indian Hotels Company Ltd.	07-06-2024	Rs.1.75 per share(175%)Final Dividend
UNO Minda Ltd.	07-06-2024	Rs.1.35 per share(67.5%)Final Dividend

Bulk Deal As On 05/06/24

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
531719	BHAGCHEM	DERIVE TRADING AND RESORTS PRIVATE LIMITED	B	4306487	188.49
531719	BHAGCHEM	SHANTILAL SHAH CHETAN	S	4310220	188.49
504340	CONFINT	D P VORA SECURITIES PRIVATE LIMITED	S	126932	5.25
504340	CONFINT	GLOBALWORTH SECURITIES LIMITED	S	367655	5.45
504340	CONFINT	KOLLIPARA PHANI KUMARI	S	76000	5.45
504340	CONFINT	KUBER EQUITY SERVICES LLP	S	82052	5.45
504340	CONFINT	MANOJ NAGINLAL JAIN	B	1006000	5.42
504340	CONFINT	VIKAS RAMESH MEHTA	S	146586	5.45
542918	GIANLIFE	MAHESHBHAI NATHABHAI PATEL	B	52246	19.79
531758	GKCONS	RAM GOPAL RAMGARHIA	B	29928	13.35
531758	GKCONS	VIKAS JAIN	S	30000	13.35
513309	GOLKONDA	DEEPAK JAIN	S	30000	15.5
513309	GOLKONDA	DEEPAK MAHAVEERCHAND JAIN (HUF)	B	30000	15.5
539697	HILIKS	SEEMA A GANDHI	B	40786	59.3
539697	HILIKS	SIVA LAKSHMANA RAO KAKARALA	S	95000	59.3
540134	IISL	FAISALSHAIKH	B	65279	6.86
539175	INDRAIND	KAUSHAL HITESHBHAI PARIKH	B	92703	14.13
539175	INDRAIND	VIKAS CHAUDHARY (HUF)	S	54511	14.18
542924	JANUSCORP	DEEPAK MAHAVEERCHAND JAIN (HUF)	B	70000	6.9
539762	MEAPL	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	32905	201.55
530251	RISAINTL	SHRADHA MANISH MEHTA	S	935624	0.6
512047	ROYALIND	MONEYCREW FINTEC PRIVATE LIMITED	B	117000	25.53
512047	ROYALIND	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	126433	25.53
544170	SAI	SOMANI VENTURES AND INNOVATIONS LIMITED	B	132000	50.07
539584	SIPTL	NIMISH PANDE	S	1685359	0.5
538402	SPS	EQUIDEM DEALERS PRIVATE LIMITED	B	89836	61
538402	SPS	JAVERI FISCAL SERVICES LIMITED	S	200000	61.2
538402	SPS	MUNISH FINANCIAL	B	100000	61.1
511523	VEERHEALTH	JAYAKRISHNA TAPARIA	B	122168	21.31
524711	VISTAPH	MEHJABEEN SHALAM	B	300000	13.22
524711	VISTAPH	UMAKANTH KATTA	S	300103	13.22

NSE

Security Code	Security Name	Client Name	Deal	Quantity	Price
AHIMSA	Ahimsa Industries Ltd.	ABHAY CHANDRAKANT LAKHANI	BUY	102000	15.9
AHIMSA	Ahimsa Industries Ltd.	BHANSALI VALUE CREATIONS PVT LTD	BUY	120000	15.9
AHIMSA	Ahimsa Industries Ltd.	CHETNA HIMANSHUBHAI AMIN	SELL	66000	15.9
AHIMSA	Ahimsa Industries Ltd.	DINESHBHAI KARSHANBHAI SENDHAV	SELL	60000	15.9
AHIMSA	Ahimsa Industries Ltd.	VINODBHAI KARSHANBHAI SENDHAV	SELL	120000	15.9
APOLLOPIPE	Apollo Pipes Limited	MEENAKSHI GUPTA	SELL	980000	647.05
APOLLOPIPE	Apollo Pipes Limited	OHANA INDIA GROWTH FUND	BUY	772000	647.05
ASLIND	ASL Industries Limited	PARAG COMMOSALES	SELL	600000	53.1
ASLIND	ASL Industries Limited	YUVRAJ HIRALAL MALHOTRA	BUY	600000	53.1
BLUEPEBBLE	Blue Pebble Limited	GUNJAN	BUY	25600	207.5
GLOBE	Globe Textiles (I) Ltd.	EMPOWER TRADEX PRIVATE LIMITED	SELL	4299903	2.85
GLOBE	Globe Textiles (I) Ltd.	KABEELON SALES CORP	BUY	2876000	2.85
HILTON	Hilton Metal Forging Limi	PARAG COMMOSALES	BUY	140000	108.4
HOACFOODS	Hoac Foods India Limited	MAHAVIR LALCHAND MEHTA HUF	BUY	39000	137.67
KCEIL	Kay Cee Energy & Infra L	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	66500	199
MAHESHWARI	Maheshwari Logistics Limi	ASHAPURA COMMODITIES	BUY	150000	60.3
MAHESHWARI	Maheshwari Logistics Limi	JAINAM BROKING LIMITED	SELL	150000	60.3
SHILPAMED	Shilpa Medicare Ltd	PLUTUS WEALTH MANAGEMENT LLP	BUY	750000	492.34
SHUBHLAXMI	Shubhlaxmi Jewel Art Ltd	MANJULABEN BABULAL MUNGARA	BUY	54000	40.72
SHUBHLAXMI	Shubhlaxmi Jewel Art Ltd	SOHAM NARENDRASINH CHAUHAN	SELL	50000	40.7
SOLARA-RE	Solara Active Pha Sci Ltd	360 ONE ASSET MANAGEMENT LIMITED	SELL	60668	17.4
SUULD	Suumaya Industries Ltd	USHIK MAHESH GALA	SELL	458652	6.51
VAISHALI	Vaishali Pharma Limited	ASHAPURA COMMODITIES	BUY	107107	133
VAISHALI	Vaishali Pharma Limited	JAINAM BROKING LIMITED	SELL	107107	133
YUKEN	Yuken India Limited	BENGAL FIN. & INV. PVT. LTD	BUY	198937	1050
YUKEN	Yuken India Limited	GKK CAPITAL MARKETS PRIVATE LIMITED	SELL	199000	1050

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