

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	34529	34529	Closed	Closed
Dow Futures	34489	34489	Closed	Closed
Nasdaq	13749	13749	Closed	Closed
FTSE	7023	7023	Closed	Closed
Nikkei	28681	28860	-179	-0.6%
Hang Seng	29161	29152	10	0.0%
SGX CNX Nifty	15629	15580	49	0.3%
Straits Singapore	3166	3164	2	0.1%
South Korea	3218	3204	14	0.4%
Taiwan	17090	17068	21	0.1%
Shanghai	3585	3615	-31	-0.9%

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	10258	10258	Closed	Closed
Alumin (\$/MT)	2483	2483	Closed	Closed
Zinc (\$/MT)	3060	3060	Closed	Closed
Brent Crude (\$/bbl)	70.2	69.3	0.9	1.3%
Gold (\$/Ounce)	1912	1907	4.9	0.3%
Silver (\$/Ounce)	28.2	28.0	0.2	0.6%
Light Crude (\$/bbl)	67.6	66.3	1.3	1.9%
N G (\$/mmbtu)	3.1	3.0	0.1	2.7%
Sugar (\$/MT)	459.6	459.6	Closed	Closed
Rubber (Rs./kg)	170.0	171.0	-1.0	-0.6%
Baltic Dry Index	2596	2596	Closed	Closed

Currency Exchange Rate	Current	Previous	Var(%)
Rs./\$ rate	72.62	72.44	0.26%
Rs./ Euro	88.50	88.29	0.24%
Rs./Chinese Yuan	11.41	11.40	0.05%
Yen /\$ rate	109.41	109.58	-0.16%
\$ US/Euro	1.22	1.22	0.02%

Dollar Index	Current	Previous	Var(%)
Dollar Index	89.78	89.83	-0.06%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	15440	35300
Support 2	15300	35000
Resistance	15670	35850

Securities in Ban For Trade	
BANKBARODA	
PNB	
SUNTV	

Market Review

US: U.S. stocks was closed
Asia: Asian stock markets rose on Tuesday while gold flirted near five-month highs ahead of European and U.S. data this week that will likely offer clues on the health of the global economy.
India: Equity benchmark Sensex rallied around 515 points on Monday while the NSE Nifty closed at a fresh peak, led by gains in RIL, ICICI Bank and HDFC Bank amid a mixed trend in global markets. A steady decline in daily COVID-19 caseload also strengthened investor sentiment, brokers said. **Market is expected to open on a flattish note and likely to witness positive move during the day**

Economy: China's factory activity expanded at the fastest pace this year in May as domestic and export demand picked up, though sharp rises in raw material prices and strains in supply chains crimped some companies' production. The Caixin/Markit Manufacturing PMI rose to 52.0 last month, the highest level since December and inching up from April's 51.9. South Korea exports logged their sharpest expansion in 32 years in May, marking another robust month of shipments fuelled by stronger consumer demand globally as many economies start to reopen. Surging chip and car shipments helped power a 45.6% surge in South Korea's exports from a year earlier, posting the fastest growth since August 1988 and extending their expansion to a seventh month in a row. Germany's annual consumer price inflation accelerated in May, advancing further above the European Central Bank's target of close to but below 2%. Consumer prices, harmonised to make them comparable with inflation data from other European Union countries, rose by 2.4% in May, up from 2.1% in April.

Commodities: Oil prices rose on Tuesday ahead of an OPEC+ meeting and on optimism that fuel demand will grow in the months ahead with the summer driving season starting in the United States, the world's top oil consumer.

Gold prices on Tuesday traded near a five-month high scaled last week, supported by a softer dollar and growing inflationary pressures, while investors awaited key U.S. data that will provide a clearer picture on the global economy's recovery path.

Currency: The dollar languished near multi-month lows versus major peers on Tuesday as traders pondered the prospects for early policy normalization by the Federal Reserve ahead of a key jobs report at the end of the week.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	26134	2571	32452	3261	-690	117432	12829	122500	13269	-5068	-440
Index Option	2963769	294602	2941053	291977	2625	885524	95664	820786	86445	64738	9219
Stock Future	164574	12819	171385	13020	-201	1414557	110789	1402140	109160	12417	1629
Stock Option	190436	14325	192483	14467	-142	157920	12047	128345	9848	29575	2199
Total	3344913	324317	3337373	322725	1592	2575433	231329	2473771	218722	101662	12607

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
21-May-21	7720	7388	332
24-May-21	8252	7129	1123
26-May-21	12548	11053	1495
27-May-21	43559	43514	45
28-May-21	5693	5272	421
Month to date-May	166431	166234	197
FII (Prov.) (Rs Cr)	Buy	Sell	Net
25-May-21	7283	6323	960
26-May-21	5114	4873	242
27-May-21	42734	43395	(661)
28-May-21	5918	5004	914
31-May-21	7457	5044	2412
Month to date-May	166977	172992	(6015)
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
25-May-21	4300	4863	(564)
26-May-21	3624	4063	(439)
27-May-21	6139	6027	112
28-May-21	6441	5166	1275
31-May-21	4912	4732	180
Month to date-May	105544	103477	2067
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
21-May-21	221	513	(292)
24-May-21	321	443	(122)
26-May-21	578	875	(298)
27-May-21	450	1401	(951)
28-May-21	175	1533	(1358)
Month to date-May	10365	11166	(801)

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1699	50%	1102	53%
Decline	1541	45%	914	44%
Unchanged	187	5%	76	4%

Market Turnover	31-May	28-May	Var (%)
BSE Cash	5316	5387	-1%
NSE Cash	72336	74125	-2%
NSE Futures	91160	97924	-7%
NSE Options	2988390	2190183	36%
Total (Rs.Cr)	3157202	2367619	33%

Volatility Index	31-May	28-May
Volatility Index	16.89	17.40

Index PE – TTM	31-May	Yr. High	Yr. Low
Sensex	31.3	36.2	21.1
Nifty	29.2	42.0	23.7

Corporate News

PNB Housing Finance to raise up to Rs 4,000 cr from Carlyle Group entities, others

PNB Housing Finance's board has approved a capital raise of up to Rs 4,000 crore, led by entities affiliated to The Carlyle Group Inc. The board has approved a preferential allotment on a private placement basis, an aggregate of 8,20,51,281 equity shares and 2,05,12,820 warrants exchangeable into equity shares at a price of Rs 390 per share warrant to Pluto Investments S.a r.l, Salisbury Investments Pvt Ltd, General Atlantic Singapore Fund FII Pte Ltd and Alpha Investments V Pte. Ltd in specified proportions for cash consideration aggregating to approximately Rs 4,000 crore. (FE)

Aiming for 20% revenue from international markets by 2025: Vinod Dasari, Royal Enfield

Order books are fairly full for Royal Enfield bikes. Company needs to ramp up our production. Company wants to Royal Enfield from being a 95% India player with one model, with one colour and so on, to be 60% in India, 20% international and 20% to come from solutions and non-motorcycle revenue. These could be things like apparel, accessories, spares, financing, insurance and so on, and a whole bunch of other solutions. (ET)

J Kumar Infraprojects bags Rs 1,307 crore order from MMRDA

The company has received a letter of acceptance from Mumbai Metropolitan Region Development Authority (MMRDA) for part design and construction of balance works... of Mumbai Metro Rail project of MMRDA, amounting to Rs 1,307 crore. (ET)

Magma Fincorp announces key management changes; Adar Poonawalla takes charge as chairman

Magma Fincorp Limited's board on May 31 appointed Adar Poonawalla as the chairman of the company. Also, the company has announced a series of leadership changes following the Poonawalla-controlled Rising Sun Holdings acquiring controlling stake through an equity infusion of Rs 3,456 crore in May 2021. Abhay Bhutada has taken over as the managing director while Vijay Deshwal, a seasoned banker with a track record of over two decades, will take charge as CEO at Magma Fincorp from the first week of July. He will also be the Group CEO of Poonawalla Group's financial services business. Deshwal is currently a business head at ICICI Bank, responsible for its fast-growing services sector, including new age businesses. He is also responsible for driving the liability strategy for the corporate ecosystem at the bank. (MC)

Top 5 Nifty Gainers	31-May	28-May	Var(%)
GAIL	160	153	4.6%
RELIANCE	2160	2095	3.1%
ICICIBANK	663	643	3.1%
JSWSTEEL	711	690	3.1%
DRREDDY	5309	5195	2.2%
Top 5 Nifty Losers	31-May	28-May	Var(%)
M&M	808	846	-4.5%
ADANI PORTS	770	776	-0.9%
INFY	1394	1405	-0.8%
LT	1468	1478	-0.7%
INDUSINDBK	1013	1019	-0.6%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	51,937	1.0%	2.5%	6.5%	56.0%
MIDCAP	21,758	0.4%	0.4%	7.1%	79.0%
SMLCAP	23,596	0.5%	1.3%	8.9%	110.3%
AUTO	23,541	-0.1%	1.5%	8.6%	61.8%
BANKEX	40,345	1.2%	1.8%	8.1%	76.5%
Capital Goods	22,498	0.1%	0.5%	11.1%	80.4%
FMCG	13,131	1.0%	1.7%	5.0%	19.1%
Health Care	24,535	0.5%	-0.3%	4.3%	56.2%
IT	27,585	-0.2%	3.2%	4.9%	92.0%
METAL	18,877	2.3%	1.9%	5.9%	166.9%
Oil & Gas	16,472	1.4%	2.5%	9.8%	37.4%
Power	2,816	1.2%	-2.2%	13.5%	86.5%
Realty	2,680	1.3%	3.5%	8.6%	85.0%

NSE USD Futures	31-May	28-May	Var (%)
June Expiry (Rs./\$)	72.90	72.90	0.0%
July Expiry (Rs./\$)	73.23	72.81	0.6%
Total Turnover (Rs. Crore)	19078	29306	-35%

Sectors	TTM PE
Auto	34.82
Auto Ancillary	71.69
Banking	26.12
Engineering	30.42
Cement	33.56
Diamonds & Jewellery	104.66
Housing Finance	28.41
Infrastructure & Const	33.55
Metals-Aluminium	24.61
Metal – Steel	11.22
Oil Expl.	42.23
Pharma	36.74
Power – Gen. Supp.	21.28
Information Tech.	32.01
Sugar	9.01
Telecom Serv. Prov.	22.79
Tyres	23.02

Economy News

India's GDP grows 1.6% in Q4, contracts 7.3% in FY21

India GDP for the Q4 grew by 1.6%, while the GDP for the entire financial year 2020-21 contracted 7.3%, as per the provisional estimates of GDP released by the Ministry of Statistics and Programme Implementation (MoSPI). The FY21 GVA at basic prices came at -6.2% while the Q4 GVA at basic prices was at 3.7%. (IE)

Non-food bank credit grows at 5.7 pc in April: RBI data

Non-food bank credit grew at 5.7% in April 2021 as against 6.7% in the year-ago month. The growth in advances to agriculture and allied activities accelerated to 11.3% in April 2021 as compared to a 4.7% growth in April 2020. Credit growth to industry decelerated to 0.4% in April 2021 from 1.7% in April 2020. (ET)

Centre's fiscal deficit for FY21 settles at 9.2% of GDP vs target of 9.5%

The Centre's fiscal deficit for the financial year 2020-21 settled at 9.2% of the gross domestic product, marginally below the government's revised target of 9.5%. This was on the back of better-than-expected revenue receipts with expenditure staying broadly at the level targeted in the revised estimates of the Budget. In absolute terms, India's fiscal deficit was Rs 18.21 trillion, about Rs 27,194 crore lower than the projected Rs 18.48 trillion. (BS)

Core sectors' output soars by 56.1% in April due to low base effect

Growth in the eight core sectors rose sharply by 56.1% YoY in April, mainly due to the low base effect. Growth in April, 2021 was also driven by a massive jump in steel and cement output. Core sector output in April 2020 shrank by a record 37.9%, as factories remained closed across the country and production came to a virtual halt. (BS)

International Corporate News

Nestle papers show over 60% of its food portfolio is 'unhealthy'

The world's largest food company, Nestlé, has acknowledged that over 60% of its mainstream food and drinks products do not meet a "recognised definition of health" and that "some of our categories and products will never be 'healthy' no matter how much we renovate". Nestlé said it was working on updating its nutrition and health strategy. (BS)

Johnson & Johnson asks high court to void \$2B talc verdict

Johnson & Johnson is asking for Supreme Court review of a \$2 billion verdict in favor of women who claim they developed ovarian cancer from using the company's talc products. (BS)

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	19.34	2156982	19.37	2931960	-0.15%	1	1404.49	1393.75	0.8%
Tata Motors	21.73	868825	22.18	1480420	-2.03%	5	315.61	318.75	-1.0%
Wipro	7.93	1287650	7.92	2004736	0.13%	1	575.89	539.05	6.8%
Dr.Reddy's	71.37	85099	72.22	127013	-1.18%	1	5182.98	5309.15	-2.4%
ICICI Bank	18.01	4372922	18.17	3241421	-0.88%	2	653.95	662.75	-1.3%
HDFC Bank	76.53	1043524	75.63	1057729	1.19%	3	1852.57	1515.85	22.2%

GDR's (US\$)				
	Prices	Prev. Close	Change	Var %
L&T	20.30	20.00	0.30	1.5%
RIL	57.65	54.80	2.85	5.2%
SBI	58.00	58.40	-0.40	-0.7%

10 year G-Sec Yield	Current	Previous	Change
US	1.61%	1.59%	2 bps
Japan	0.09%	0.09%	(0) bps
India	6.02%	6.00%	2 bps
UK	0.80%	0.80%	0 bps
Libor 3 Mths	0.13%	0.13%	(0) bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	593	590	0.5%
Inflation – WPI	10.49%	7.39%	310 bps
Inflation – CPI	4.29%	5.52%	44 bps

India GDP	Q4FY21	Q3FY21	FY21
Growth	1.6%	0.5%	-7.3%

Monetary Policy	Current	Previous	Change
Repo Rate	4.00%	4.00%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	3.00%	3.00%	0 bps
O/S Banking System Liquidity (Rs bn)	5397	5397	1

IIP Growth -%	Mar-21	Mar-20	YTD-FY21
IIP	22.4	0.2	-8.6
Mining	6.1	2.2	-7.8
Manufacturing	25.8	-0.3	-9.8
Electricity	22.5	1.3	-0.5

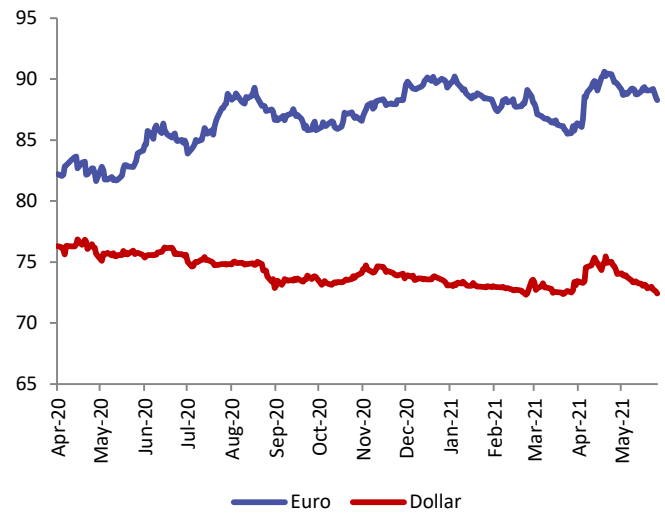
US Economy Data	Current	Previous
Inflation (%) (YoY)	2.60%	1.70%
Unemployment (%)	6.10%	6.00%

Interest Rate (%)	Current	Previous
Fed Rate	0-0.25%	0-0.25%

US GDP	Q1CY21	Q4CY20
Growth (QoQ Annualized)	6.4%	4.3%

China Economy Data	Current	Previous
GDP	18.30%	6.50%
Inflation – CPI (%)	0.90%	0.40%

Euro Vs Dollar (Source:BBG)



	Date
Indian GDP Data	31 August
Indian Inflation Data CPI	14 June
Indian Inflation Data WPI	14 June
Indian Monetary Policy	04 June
India's Industrial Production (IIP)	11 June
US Inflation Data	10 June
US GDP	To be announced
US Unemployment Data	04 June
US Fed Rate	16 June
China GDP	15 July
China Inflation Data	09 June

Event Update		
Co. Name	Date	Purpose
Housing Development Finance Corporation Ltd.	01/06/21	Rs.23.00 per share(1150%)Dividend
Infosys Ltd.	01/06/21	Rs.15.00 per share(300%)Final Dividend
Kanpur Plastipack Ltd.	03/06/21	Rs.1.00 per share(10%)Special Dividend
RAW Eedge Industrial Solutions Ltd.	04/06/21	Bonus issue
City Union Bank Ltd.	07/06/21	Interim Dividend
KSolves India Ltd.	07/06/21	Bonus issue
Manappuram Finance Ltd.	07/06/21	Rs.0.75 per share(37.5%)Interim Dividend
Asian Paints Ltd.	11/06/21	Rs.14.50 per share(1450%)Final Dividend
Nippon Life India Asset Management Ltd.	11/06/21	Rs.5.00 per share(50%)Final Dividend
Shree Digvijay Cement Company Ltd.	11/06/21	A.G.M.
Varun Beverages Ltd.	12/06/21	Bonus issue
The Indian Hotels Company Ltd.	15/06/21	Rs.0.40 per share(40%)Final Dividend
Raghav Productivity Enhancers Ltd.	18/06/21	Rs.0.50 per share(5%)Final Dividend
Torrent Pharmaceuticals Ltd.	18/06/21	Rs.15.00 per share(300%)Final Dividend
Angel Broking Ltd.	22/06/21	A.G.M.
Aarti Industries Ltd.	23/06/21	Bonus issue
Torrent Power Ltd.	25/06/21	Rs.5.50 per share(55%)Final Dividend

Bulk Deal AS On 31/05/21

BSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
539991	CFEL	BABITA SARAOGI	B	36718	37.05
539991	CFEL	DEEPAK KUMAR VIJAYVARGEE HUF	S	36600	37.05
500209	INFY	KUMARI SHIBULAL	S	667935	1391
500209	INFY	S D SHIBULAL	B	667935	1391
509709	INTLCONV	I G E (INDIA) PRIVATE LIMITED	B	2076286	41.54
509709	INTLCONV	RITU DALMIA	S	826286	41.4
509709	INTLCONV	YAMINI DABRIWALA	S	1250000	41.62
540937	MEDICO	NOPEA CAPITAL SERVICES PRIVATE LIMITED	S	24000	125
540937	MEDICO	PARAG JHAVERI HUF	B	24000	125
540198	OSIAJEE	ACVC FOREX PRIVATE LIMITED	S	42592	28.16
526043	POLYCHMP	ALACRITY SECURITIES LIMITED	B	30000	43.8
526043	POLYCHMP	DINESH LAXMANSINH RAJPUT	S	104007	43.16
540259	SHANGAR	JINESH ASHWIN MATALIA	S	100000	10.81
539026	SSPNFIN	ASHOK KUMAR SINGH	B	24000	8.17
539026	SSPNFIN	GUNMALA RAJENDRA AGARWAL	B	28000	8.23
539026	SSPNFIN	KESHIRMAL BABULAL JAIN	S	96000	8.18
530419	SUMEDHA	BHARTIBEN VAKHARIA	B	92000	27.82
530419	SUMEDHA	SHRENIK VAKHARIA	S	92000	27.82
533170	TAMBOLI	RAJIV GARG	S	68971	41.58
511736	USHDI	SIDDHARTHA KHATWANI	S	2500000	0.64

NSE					
Scrip Code	Scrip Name	Client Name	Deal	Quantity	Price
ASALCBR	Asso Alcohols & Brew Ltd	RATHI ROHIT KISHOR	BUY	101646	436.73
AUTOIND	Autoline Industries Limit	SWETSAM STOCK HOLDING PRIVATE LIMITED	BUY	218500	37.75
BOHRA	Bohra Industries Limited	GIRIRAJ TRADING	SELL	130000	6.65
DCM	DCM Ltd	MANJU GAGGAR	BUY	110959	30.06
GBGLOBAL	GB Global Limited	BABALBHAI MANILAL PATEL	BUY	31000	9.3
IRB	IRB Infrastructure Develo	HDFC MUTUAL FUND	BUY	2481000	111
IRB	IRB Infrastructure Develo	ZENITH MULTI TRADING DMCC	SELL	2500000	111
MCDHOLDING	McDowell Holdings Limited	SURESH POONATI	SELL	100000	48.37
MOKSH	Moksh Ornaments Limited	DAYAL TAHILRAM PARWANI	SELL	61158	64
ONEPOINT	One Point One Sol Ltd	CHIRAG NARENDRA MODH	BUY	169411	16.37
PATINTLOG	Patel Integrated Logistic	ASGAR PATEL	SELL	367300	23.62
SALASAR	Salasar Techno Engg. Ltd.	MANOJ GUPTA	BUY	100800	660
SANWARIA	Sanwaria Consumer Ltd.	MULTIPLIER S AND S ADV PVT LTD	BUY	7323447	0.73
SHIVAMILLS	Shiva Mills Limited	SABITA SHETTY	SELL	47196	65.65
TIRUPATI	Shree Tirupati Balajee	ANANT KUMAR BOMB	BUY	96000	40
TIRUPATI	Shree Tirupati Balajee	SOHAM INVESTMENT	SELL	96000	40
SOLEX	Solex Energy Limited	BIJAL MUKESH SHAH (HUF)	SELL	40000	50.1
SOLEX	Solex Energy Limited	SHELAT GAURANG UPENDRABHAI	BUY	40000	50.1
TEMBO	Tembo Global Ind Ltd	RAVI GOYAL (HUF)	BUY	100000	160.39
UNIVCABLES	Universal Cables Ltd	ROCKLINE CONSTRUCTION CO.(NG) (PROP.NARENDRAPAL GUPTA	BUY	167889	209.87
VIKASWSP	Vikas Wsp Ltd	SONY SEBASTIAN	BUY	1083234	5.42

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Nirmal Bang Research (Division of Nirmal Bang Securities Pvt. Ltd.)

B-2, 301/302, Marathon Innova,
Opp. Peninsula Corporate Park
Off. Ganpatrao Kadam Marg
Lower Parel(W), Mumbai-400013
Board No. : 91 22 6723 8000/8001
Fax. : 022 6723 8010