

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,517.05	-120.75	-0.47	3.24	7.47
BSE Sensex	83,606.46	-452.44	-0.54	2.74	6.49
Bank Nifty	57,312.75	-131.15	-0.23	2.52	12.24
Nifty Midcap 100	59,741.20	356.05	0.60	3.40	3.99
Nifty Smallcap 100	19,075.10	98.3	0.52	5.41	0.61
S&P 500	6,204.95	31.88	0.52	3.99	5.73
DJIA	44,094.77	275.5	0.63	3.58	4.02
Nasdaq 100	22,679.01	144.81	0.64	4.85	8.12
Nikkei 225	40,487.39	336.6	0.84	8.05	3.00
Hang Seng	24,072.28	-211.87	-0.87	3.95	22.67
Shanghai Com	3,444.43	20.20	0.59	2.45	5.57

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,517.05	57,312.75
Support	25,410 & 25,300	57,050 & 56,860
Resistance	25,670 & 26,800	57,630 & 57,770

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,967.60	13,799.10	-831.50
DII Cash Market	15,914.52	12,417.08	3,497.44

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Trent	6,217.50	3.29	2,136.46
SBI	820.35	1.86	19,652.61
Bharat Elec	421.50	1.69	20,350.62
IndusInd Bank	872.10	1.68	4,353.16
Jio Financial	326.75	1.02	36,746.30
<b>Top Losers</b>			
TATA Cons. Prod	1,098.90	-2.26	1,836.29
Axis Bank	1,199.20	-2.11	6,559.87
Kotak Mahindra	2,163.50	-2.01	3,727.66
Hero Motocorp	4,237.10	-1.93	871.01
Maruti Suzuki	12,400.00	-1.91	448.96

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.43	-0.46	-12.51
WTI (USD/bbl)	64.74	-0.54	-11.45
Gold Spot (USD/t oz.)	3,317.48	0.43	24.80
USD/INR	85.75	-0.31	0.12
10 Year G-Sec India	6.324	0.16	-6.74
US 10 Year Bond	4.216	-0.28	-7.72

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's benchmark indexes edged lower on Monday, snapping a four-session rally, as profit-taking in financials near record highs overpowered optimism from easing geopolitical tensions. As of 6:40 a.m., the GIFT Nifty was up 0.08% or 20.50 points at 25,652.50, implying a stronger start for the NSE Nifty 50 index.

#### Global

The S&P 500 and Nasdaq closed at record highs, ending their strongest quarter in over a year, as optimism for trade accords and potential rate cuts eased investor concerns.

Japan's Nikkei share average closed at a more than 11-month high, as investor risk appetite increased following a robust rebound in US shares, fueled by prospects for trade talks and Federal Reserve rate cuts.

Hong Kong stocks slumped as a government data revealed that manufacturing in China struggled to develop this month as US tariffs impeded exports, while traders braced for additional turbulence ahead of a deadline on US trade negotiations.

### Commodities & Currency :

The Indian rupee fell, ending the month and quarter somewhat lower than other Asian peers due to sluggish portfolio inflows and the country's foreign investment deficit.

Gold rose as the dollar remained at its lowest level in more than three years, while the market's attention switched to a flood of US jobs data due later this week, which could affect the Federal Reserve's rate-cutting path.

### News:

India's industrial output rose 1.2% YoY in May, the slowest pace since August 2024, according to government data.

India's fiscal deficit in April-May was 131.6 billion rupees (\$1.5 billion) or 0.8% of the estimate for the fiscal year ending March 31, according to government data.

The gross bad loan ratio of Indian banks would remain near to multi-decade lows if economic development continues as expected, according to a central bank assessment.

Waaree Energies' fully owned subsidiary, Waaree Solar Americas, obtained a contract to provide 540 MW of solar modules from a renowned customer in the United States, leading to a 6.47% rally.

ITD Cementation India's stock rose 5.03% after the business received an international maritime contract for \$67.4 million (roughly Rs 580 crore) for jetty construction work relating to the Ruwais LNG project in Abu Dhabi.

The NESCO board approved Rs 3,500 crore in capital expenditure over six years for the development of Tower 2 in Mumbai IT Park, according to the company's exchange report.

Today marks the debut of three mainboard IPOs: Globe Civil Projects, Ellenbarrie Industrial Gases, and Kalpataru Ltd.

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