

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	26,175.75	-27.2	-0.10	0.00	10.25
BSE Sensex	85,641.90	-64.77	-0.08	0.00	9.09
Bank Nifty	59,681.35	-71.35	-0.12	0.00	16.88
Nifty Midcap 100	61,043.40	0.15	0.00	0.00	6.25
Nifty Smallcap 100	17,874.70	45.45	0.25	0.00	-5.72
S&P 500	6,812.62	-36.46	-0.53	0.00	16.71
DJIA	47,289.33	-427.09	-0.90	0.00	12.56
Nasdaq 100	25,342.85	-92.04	-0.36	0.00	21.26
Nikkei 225	49,303.28	-950.63	-1.89	0.00	25.43
Hang Seng	26,033.26	174.37	0.67	0.00	32.66
Shanghai Com	3,914.01	25.41	0.65	0.00	19.97

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,175.75	59,681.35
Support	26,130 & 26,055	59,530 & 59,310
Resistance	26,280 & 26,370	59,830 & 60,200

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	8,979.40	10,150.71	-1,171.31
DII Cash Market	13,024.65	10,465.72	2,558.93

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TMPV	363.80	1.96	12714.14
Bharat Elec	417.25	1.34	9650.32
Maruti Suzuki	16097.00	1.24	434.05
HCL Tech	1642.90	1.15	2034.35
Kotak Mahindra	2147.60	1.09	3262.03
Top Losers			
Max Healthcare	1125.40	-3.22	3436.35
Interglobe Avi	5794.00	-1.82	586.22
Bajaj Finance	1021.10	-1.58	6459.84
Sun Pharma	1807.40	-1.32	1869.29
Trent	4215.90	-0.81	542.86

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.98	0.96	-17.06
WTI (USD/bbl)	59.15	1.02	-19.12
Gold Spot (USD/t oz.)	4,233.83	0.34	60.05
USD/INR	89.56	-0.11	4.57
10 Year G-Sec India	6.531	0.38	-3.68
US 10 Year Bond	4.090	-0.17	-12.16

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices failed to sustain record highs on Monday 1st December, and the rupee fell to an all-time low as investor's feared outflows would continue amid uncertainty about a trade deal with the United States.

Global

US stocks closed modestly lower on Monday, weighed down by a jump in Treasury yields and economic data that showed tariffs remained a drag on the manufacturing sector, as investors looked toward the Federal Reserve's policy announcement next week.

Japan's Nikkei share average fell on Monday after a four-session winning run, as government bond yields rose and the yen firmed on growing bets of a December interest rate hike.

Hong Kong stocks rose on Monday, led by technology heavyweights, as growing conviction about a US interest-rate cut this month overcame concerns about an artificial-intelligence bubble and a contraction in mainland factory activity.

Commodities & Currency :

The Indian rupee plummeted to a record low as sluggish trade and portfolio movements, combined with the absence of a US-India trade agreement, overshadowed the impact of strong economic growth.

Gold prices rose to a six-week high supported by growing expectations of US interest rate cuts and a sliding dollar, while silver struck a record high ahead of key US economic data.

News:

India collected 1.70 trillion rupees (\$18.98 billion) in gross goods and services taxes in November, about 0.7% higher than a year earlier.

India's telecoms ministry has privately asked smartphone makers to preload all new devices with a state-owned cyber security app that cannot be deleted, a government order showed a move likely to antagonise Apple and privacy advocates.

The government has decided to divest up to 6 per cent stake in state-owned Bank of Maharashtra through an Offer for Sale commencing on Tuesday.

India's manufacturing sector lost some momentum in November with growth decelerating to a nine-month low as stiff US tariffs took a heavy toll on demand, a survey showed.

India's current account deficit moderated in the July-September quarter on the back of a lower merchandise trade deficit, the Reserve Bank of India said.

India is assessing the viability of importing coking coal from Mongolia despite transport bottlenecks, a source with direct knowledge of the matter said, as New Delhi seeks to diversify supplies of the key steelmaking ingredient.

India's robust growth numbers for the September quarter are raising questions about the need for lower rates even as record-low inflation gives the central bank ample room to resume reductions later this week, analysts said.

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