

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,453.40	-88.4	-0.35	-0.35	7.20
BSE Sensex	83,409.69	-287.6	-0.34	-0.34	6.24
Bank Nifty	56,999.20	-460.25	-0.80	-0.80	11.63
Nifty Midcap 100	59,667.25	-82.8	-0.14	-0.14	3.86
Nifty Smallcap 100	18,977.10	-78.6	-0.41	-0.41	0.09
S&P 500	6,227.42	29.41	0.47	0.47	6.12
DJIA	44,484.42	-10.52	-0.02	-0.02	4.94
Nasdaq 100	22,641.89	163.76	0.73	0.73	7.94
Nikkei 225	39,762.48	-223.85	-0.56	-0.56	1.16
Hang Seng	24,221.41	149.13	0.62	0.00	23.43
Shanghai Com	3,454.79	-2.96	-0.09	-0.09	5.89

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,453.40	56,999.20
Support	25,300 & 25,200	56,700 & 56,320
Resistance	25,600 & 26,700	57,260 & 57,630

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,954.40	15,516.02	-1,561.62
DII Cash Market	16,695.01	13,658.33	3,036.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Tata Steel	165.88	3.64	63,315.21
JSW Steel	1,059.90	2.94	3,166.92
Asian Paints	2,419.40	2.11	1,936.06
UltraTechCement	12,436.00	1.85	445.83
Maruti Suzuki	12,622.00	1.45	609.74
Top Losers			
Shriram Finance	676.90	-2.81	3,288.84
HDFC Life	789.70	-2.49	3,248.68
IndusInd Bank	857.65	-2.44	10,183.15
Bajaj Finserv	2,007.90	-2.23	1,204.93
Larsen	3,596.80	-1.91	1,330.18

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.58	-0.93	-9.68
WTI (USD/bbl)	66.96	-0.96	-8.66
Gold Spot (USD/t oz.)	3,350.89	0.36	26.07
USD/INR	85.71	-0.20	0.07
10 Year G-Sec India	6.289	-0.06	-7.26
US 10 Year Bond	4.259	-0.41	-6.14

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities moved lower on Wednesday as financials retreated from recent highs, overshadowing euphoria about a potential India-US trade deal. Meanwhile, HDB Financial Services, the year's largest IPO, jumped on debut. As of 6:51 a.m., the GIFT Nifty was up 0.04% or 9.50 points at 25,566.00, indicating a flat start for the Nifty 50 with a bullish bias.

Global

The S&P 500 gained as President Donald Trump announced a US-Vietnam trade agreement. However, a fresh study showed that private payrolls unexpectedly fell in June, raising concerns about the state of the US economy.

RITES rose 5.68% after obtaining two large orders: a \$3.6 million international agreement to transport repaired locomotives to Africa and a Rs 37.81 crore station renovation project in India via the RITES-Aryan joint venture.

Hong Kong stocks rebounded from a one-week low as mainland funds poured more money into the city's assets on hopes that Beijing will push for high-quality growth while reining in excessive pricing rivalry in certain areas.

Commodities & Currency :

The Indian rupee fell marginally, matching small drops in its regional rivals, as investors remained focused on an impending US tariff deadline and clues on the future direction of the Federal Reserve's benchmark policy rates.

Gold prices maintained steady as investors squared their positions ahead of US non-farm payrolls data, hoping for more clarity on the timing of future Fed rate reduction.

News:

A shareholder in India's Nykaa, Hong Kong-based businessman Harindarpal Singh Banga and his family, seek to sell ownership worth 12.84 billion rupees (\$149.93 million) in the beauty products shop through a block deal.

For the first time, India employed a uniform contract note for trading on both of its main stock exchanges, according to the country's markets regulator, following a technique seen in mature markets such as the United States.

India is considering developing three new strategic oil reserves to increase its emergency stockpile and bolster energy security, according to the director of the firm in charge of strategic reserves.

Hero MotoCorp increased 0.28% as the company reported dispatching 553,963 bikes and scooters in June 2025, a 10.03% increase from 503,448 units delivered in June 2024.

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