

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,405.30	-48.1	-0.19	-0.53	7.00
BSE Sensex	83,239.47	-170.22	-0.20	-0.55	6.03
Bank Nifty	56,791.95	-207.25	-0.36	-1.16	11.22
Nifty Midcap 100	59,683.25	16.00	0.03	-0.11	3.89
Nifty Smallcap 100	19,027.05	49.95	0.26	-0.15	0.35
S&P 500	6,279.35	51.93	0.83	1.31	7.00
DJIA	44,828.53	344.11	0.77	0.75	5.75
Nasdaq 100	22,866.97	225.08	0.99	1.73	9.02
Nikkei 225	39,785.90	23.42	0.06	-0.50	1.22
Hang Seng	24,069.94	-151.47	-0.63	-0.63	22.66
Shanghai Com	3,461.15	6.36	0.18	0.10	6.09

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,405.30	56,791.95
Support	25,300 & 25,200	56,700 & 56,470
Resistance	25,690 & 26,800	57,300 & 57,600

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,672.96	13,154.15	-1,481.19
DII Cash Market	12,690.40	11,357.34	1,333.06

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Apollo Hospital	7,565.00	1.67	894.59
Dr Reddys Labs	1,291.30	1.61	1,918.95
Hero Motocorp	4,310.60	1.58	650.63
ONGC	244.05	1.24	13,890.36
Maruti Suzuki	12,752.00	1.03	606.22
Top Losers			
SBI Life Insurance	1,810.20	-2.51	916.86
Kotak Mahindra	2,126.60	-1.96	4,667.39
Bajaj Finance	910.15	-1.39	7,606.10
Bajaj Finserv	1,980.70	-1.35	1,133.54
JSW Steel	1,046.10	-1.30	1,703.76

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.53	-0.39	-9.75
WTI (USD/bbl)	67.28	-0.27	-8.68
Gold Spot (USD/t oz.)	3,330.15	-0.81	25.29
USD/INR	85.32	0.46	-0.38
10 Year G-Sec India	6.288	-0.02	-7.28
US 10 Year Bond	4.338	1.31	-4.89

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian markets fell slightly on Thursday as persistent profit taking in financials trumped optimism over reducing global trade tensions. As of 6:48 a.m., the GIFT Nifty was down 0.14% or 35 points at 25,525.50, implying that the NSE Nifty 50 index would open lower.

Global

Wall Street climbed to record closing highs, as chipmaker Nvidia approached a \$4 trillion valuation and a surprise robust US jobs data boosted investors, who shrugged off poor prospects for an interest rate decrease this month.

Japan's Nikkei stock index rose slightly, despite uncertainty over a trade deal with the United States and the fear of high tariffs dampening investor sentiment.

Hong Kong stocks tumbled as US trade agreements with Vietnam and other trading partners revealed that Washington was putting barriers in place to restrict Chinese goods exported from offshore manufacturing, potentially raising trade tensions.

Commodities & Currency :

The Indian rupee rose to its highest level in a month, boosted by dollar sales from foreign banks and a reduction in bearish bets on the local currency, while optimism about a US-India trade deal also improved mood.

Gold sank as stronger-than-expected US payroll statistics reinforced predictions that the Federal Reserve will not lower interest rates as soon as originally planned, reducing the metal's appeal.

News:

India's Oil and Natural Gas Corporation announced that it has inked an agreement with Mitsui O.S.K. Lines, Japan's second-largest shipping business, to build and operate two very large ethane carriers (VLECs). Carlyle Group, a private equity firm, is planning to sell up to 10% of its share in India's Piramal Pharma, according to Moneycontrol, citing sources.

Indian billionaire Mukesh Ambani's Reliance Industries has announced that it will spin off its consumer products section into a new corporation to allow the fast-growing company to attract investors other than those backing its retail segment.

India's defence acquisition council has cleared the commencement of a procedure to acquire weaponry and military equipment worth 1.05 trillion rupees (\$12.31 billion), according to the defense ministry.

Punjab National Bank's domestic deposits increased by 12.2% to Rs 15,36,871 crore in June 2025, up from Rs 13,69,916 crore in June 2024. Mahindra & Mahindra Financial Services climbed 0.29% after reporting a 1% year-on-year growth in total disbursements to Rs 12,800 crore in the first quarter.

Biocon's stock climbed 1.76% after the firm announced that Biocon Biologics had received European Commission (EC) marketing authorization in the European Union (EU) for Vevzuo and Evfraxy biosimilars of Denosumab.

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