

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,722.75	157.4	0.64	0.64	4.13
BSE Sensex	81,018.72	418.81	0.52	0.52	3.20
Bank Nifty	55,619.35	1.75	0.00	0.00	8.93
Nifty Midcap 100	57,432.35	795.20	1.40	1.40	-0.03
Nifty Smallcap 100	17,893.40	225.2	1.27	1.27	-5.62
S&P 500	6,329.94	91.93	1.47	1.47	7.86
DJIA	44,173.64	585.06	1.34	1.34	4.20
Nasdaq 100	23,188.61	425.3	1.87	1.87	10.55
Nikkei 225	40,290.70	-508.9	-1.25	-1.25	2.50
Hang Seng	24,733.45	225.64	0.92	0.92	26.04
Shanghai Com	3,583.31	23.36	0.66	0.66	9.83

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,722.75	55,619.35
Support	24,600 & 24,460	55,360 & 55,130
Resistance	24,830 & 24,920	55,800 & 56,100

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,014.97	11,581.48	-2,566.51
DII Cash Market	14,068.40	9,682.11	4,386.29

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Hero Motocorp	4535.90	5.20	1455.00
Tata Steel	159.56	4.28	30064.72
Bharat Elec	389.55	3.27	13454.38
Adani Ports	1388.90	3.10	1368.32
JSW Steel	1055.90	2.73	1835.68
Top Losers			
Power Grid Corp	287.95	-1.13	10397.12
HDFC Bank	1992.00	-1.00	6966.97
ONGC	234.83	-0.83	16174.97
Apollo Hospital	7308.00	-0.59	261.00
ICICI Bank	1463.20	-0.57	6140.05

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.65	-1.46	-9.59
WTI (USD/bbl)	66.17	-1.74	-9.53
Gold Spot (USD/t oz.)	3,377.07	0.40	27.06
USD/INR	87.65	-0.14	2.34
10 Year G-Sec India	6.32	-0.79	-6.83
US 10 Year Bond	4.200	0.19	-8.07

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices gained on Monday, supported by advances in metals and IT firms, as expectations of a US rate decrease overshadowed fears about prospective US tariffs on Indian imports. The GIFT Nifty was up 0.07% or 16.50 points at 24,723, implying a stronger open for the NSE Nifty 50 index.

Global

All three major US stock indexes ended more than 1% higher on Monday as investors sought bargains after the previous session's selloff and increased bets for a September rate cut in the wake of Friday's weaker-than-expected jobs data.

Tokyo stocks fell, with the Nikkei index briefly diving over 2 percent, fuelled by concerns over a US economic slowdown following weaker-than-expected jobs data.

Hong Kong stocks started the week on a solid note as the benchmark gauge ended a four-day streak of declines on hopes that a worsening US job market would lead to an interest-rate cut and leave more room for China to ease its monetary policy to bolster growth.

Commodities & Currency :

The Indian rupee extended its decline against the US dollar on Monday, pressured by persistent foreign outflows and sustained dollar demand from importers, particularly state-run oil companies. Gold prices rose for a third straight session on Monday after last week's economic data fuelled expectations of interest rate cuts by the US Federal Reserve.

News:

Bharti Airtel's digital unit Xtelify announced a new cloud platform and AI-powered software offerings for businesses and telecom operators, alongside partnerships with Singtel, Globe Telecom and Airtel Africa.

India's IndusInd Bank said that its board has appointed Rajiv Anand as chief executive officer for a three-year term starting August 25.

A joint venture between India's JSW Steel and Japan's JFE Steel will invest 58.45 billion rupees (\$669 million) to expand production capacity of cold rolled grain-oriented electrical steel across two Indian plants to meet growing domestic demand, JSW Steel said.

India's GreenLine Mobility Solutions said on Monday it will invest 4 billion rupees (\$45.7 million) to boost its electric truck supply fleet for miner Hindustan Zinc, replacing diesel vehicles.

India's DLF reported an 18% jump in first-quarter profit on Monday as strong demand for premium apartments outweighed higher costs, mainly tied to more land parcels acquired.

India's Shree Cement topped first-quarter profit expectations on Monday, helped by fuel-led expense control measures.

The Multi Commodity Exchange of India (MCX) surged 5.08%. On a consolidated basis, MCX's net profit for Q1FY26 was Rs 203.19 crore, up 83% year on year (YoY) from the same quarter previous year.

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