

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,461.00	55.70	0.22	-0.31	7.00
BSE Sensex	83,432.89	193.42	0.23	-0.32	6.03
Bank Nifty	57,031.90	239.95	0.42	-1.16	11.22
Nifty Midcap 100	59,677.75	-5.50	-0.01	-0.11	3.89
Nifty Smallcap 100	19,033.05	6.00	0.03	-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	39,810.88	24.98	0.06	-0.50	1.22
Hang Seng	23,916.06	-153.88	-0.64	-0.63	22.66
Shanghai Com	3,472.32	11.17	0.32	0.10	6.09

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,461.00	57,031.90
Support	25,300 & 25,200	56,530 & 56,250
Resistance	25,600 & 26,700	57,360 & 57,630

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	7,517.79	8,277.90	-760.11
DII Cash Market	10,305.48	11,334.32	-1,028.84

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Bajaj Finance	925.30	1.66	10,613.05
Infosys	1,640.70	1.36	4,411.27
Dr Reddys Labs	1,307.40	1.25	1,466.01
ICICI Bank	1,442.80	1.19	5,066.50
HUL	2,339.30	1.12	1,242.35
Top Losers			
Trent	5,456.00	-11.87	7,516.97
Tata Steel	163.01	-1.75	22,938.75
Eicher Motors	5,629.00	-1.52	185.01
Tech Mahindra	1,655.20	-1.00	1,310.54
Maruti Suzuki	12,646.00	-0.83	225.61

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.30	-0.73	-9.75
WTI (USD/bbl)	66.49	-0.76	-8.68
Gold Spot (USD/t oz.)	3,336.64	0.30	25.29
USD/INR	85.497	0.07	-0.38
10 Year G-Sec India	6.290	0.16	-7.28
US 10 Year Bond	4.328	-0.28	-4.89

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian indices crept higher on Friday, boosted by IT stocks after good US jobs data eased economic fears and a late rally in financials.

Global

The US stock markets were closed on Friday, July 4, in observance of America's Independence Day 2025.

Japan's Nikkei closed marginally higher, as chip-related stocks followed Wall Street's good overnight performance, but the index broke a three-week winning run due to caution ahead of the US trade deal deadline.

Hong Kong stocks fell for the second day as investors shun risks amid concerns about global trade tensions before a deadline next week to tackle higher US export tariffs, while the outlook for higher borrowing costs hurt developers.

Commodities & Currency :

The Indian rupee had moderate price activity on Friday, finishing the week unchanged as traders awaited developments in US-India trade talks, with a positive outcome potentially enabling the local currency break beyond a stubborn resistance level.

Gold prices rebounded and were heading for a weekly gain, helped by a retreat in the US dollar and safe-haven inflows, as US President Donald Trump's deadline for trade deals loomed.

News:

Bank lending to the Indian economy may not see a meaningful boost despite the large liquidity surplus in the banking system, economists at J.P. Morgan said in a report

India is ready to make trade deals in the national interest, but not just to meet deadlines, Trade Minister Piyush Goyal said on Friday when asked whether a deal could be reached with the US in time for a July 9 deadline set by Washington.

Tata Steel said the eastern state of Odisha has issued a demand notice for 19.03 billion rupees (\$222.87 million), citing a shortfall in mineral dispatch from the company's Sukinda Chromite Block during the 2023–24 production year.

Godrej Consumer expects first-quarter consolidated revenue to grow in the double-digit percentage range, the consumer goods maker said in a provisional update.

India's top private lender HDFC Bank said on Friday that its sequential growth in deposits outpaced loans in the first quarter.

Trent dropped 11.93% after the company's Q1 FY26 business report fell short of market expectations, raising concerns about its growth pace. The Tata Group's retail segment recorded a 20% year-on-year gain in standalone revenue, hitting Rs 5,061 crore in the June 2025 quarter. Trent's growth did not meet its five-year compounded annual growth rate (CAGR) of 35%, prompting concerns about the company's ability to maintain past performance.

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