

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,509.70	-87.95	-0.34	-0.98	7.44
BSE Sensex	83,311.01	-148.14	-0.18	-0.79	6.12
Bank Nifty	57,554.25	-272.8	-0.47	-0.94	12.72
Nifty Midcap 100	59,468.60	-568.60	-0.95	-1.36	3.51
Nifty Smallcap 100	18,105.00	-255.9	-1.39	-2.21	-4.51
S&P 500	6,720.32	-75.97	-1.12	-1.92	14.51
DJIA	46,912.30	-398.7	-0.84	-0.90	10.66
Nasdaq 100	25,130.04	-489.99	-1.91	-3.25	19.81
Nikkei 225	50,883.68	671.41	1.34	-1.19	29.45
Hang Seng	26,485.90	550.49	2.12	1.25	34.97
Shanghai Com	4,007.76	38.51	0.97	0.79	22.84

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,509.70	57,554.25
Support	25,370 & 25,300	57,360 & 56,950
Resistance	25,680 & 25,800	58,150 & 58,350

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,791.16	20,054.37	-3,263.21
DII Cash Market	19,418.50	14,134.59	5,283.91

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Asian Paints	2602.90	4.67	4448.62
Reliance	1496.10	1.56	16772.68
M&M	3618.50	1.04	4535.98
Interglobe Avi	5693.00	0.99	2249.42
TATA Cons. Prod	1190.40	0.94	2401.72
Top Losers			
Grasim	2700.10	-6.31	1986.85
Hindalco	788.40	-5.17	34786.64
Adani Enterprise	2314.30	-4.36	1978.15
Power Grid Corp	270.20	-3.17	21919.59
Eternal	305.65	-2.50	44725.33

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.22	-0.47	-16.57
WTI (USD/bbl)	59.27	-0.54	-18.94
Gold Spot (USD/t oz.)	3,990.18	0.26	50.13
USD/INR	88.63	0.04	3.47
10 Year G-Sec India	6.515	-0.20	-3.93
US 10 Year Bond	4.089	0.14	-10.51

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities benchmarks fell slightly on Thursday 06th November, as a lack of major triggers left the market in consolidation mode, with Reliance Industries gains largely offsetting broader market losses. As of 6:56 a.m., the GIFT Nifty was down 0.11%, or 28.50 points, at 25,511, implying a slightly weaker opening for the benchmark index.

Global

US stocks closed in negative territory, with a resumption of Tuesday's tech selloff as investors contended with mounting economic uncertainty and stretched valuations.

Japan's Nikkei share average rose more than 1%, rebounding from the last session's steep losses, as a strong overnight finish on Wall Street revived risk appetite.

Hong Kong stocks rose by the most in nearly three weeks, tracking gains in global markets as dip-buying kicked in after a sell-off triggered by jitters over elevated valuations of technology companies.

Commodities & Currency :

The Indian rupee closed barely changed, trapped between ongoing dollar demands from importers and encouraging signs from increases in Asian rivals as desire for riskier assets returned.

Gold prices edged up, buoyed by a weaker dollar and a resurgence of safe-haven demand on concerns over a prolonged US government shutdown and uncertainty over the legality of tariffs.

News:

India's dominant services sector saw its expansion falter to a five-month low in October, as competitive pressures and heavy rains dampened the robust pace of growth seen in recent months, a survey showed.

India's markets regulator will consult with exchanges, banks and small-and-medium enterprises associations to review initial public offerings by small businesses, Chairman Tuhin Kanta Pandey said.

Life Insurance Corporation of India reported higher second-quarter profit and wider margins on Thursday, buoyed by an improved product mix, and said it anticipates strong insurance demand in the second half of the fiscal year.

Ola Electric cut its overall revenue target but maintained its margin forecast for the core automotive business as the electric two-wheeler maker shifts focus to profitability over volumes.

India's Mahindra & Mahindra sold its entire 3.5% stake in RBL Bank for 6.78 billion rupees (\$77.1 million), the automaker said on Thursday, marking a 62.5% return on its 2023 investment.

India needs to double its sugar export allocation to 2 million metric tons in the new season, as lower diversion of sugar for ethanol production is expected to leave a larger domestic surplus, industry officials said.

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