AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 08th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,596.15	21.95	0.09	0.13	3.59
BSE Sensex	80,623.26	79.27	0.10	0.03	2.70
Bank Nifty	55,521.15	110.00	0.20	-0.17	8.74
Nifty Midcap 100	56,938.30	188.55	0.33	0.53	-0.89
Nifty Smallcap 100	17,692.65	30.05	0.17	0.14	-6.68
S&P 500	6,340.00	-5.06	-0.08	1.63	8.03
DJIA	43,968.64	-224.48	-0.51	0.87	3.72
Nasdaq 100	23,389.53	74.49	0.32	2.75	11.51
Nikkei 225	41,059.15	264.29	0.65	0.64	4.46
Hang Seng	25,081.63	171.00	0.69	2.34	27.82
Shanghai Com	3,639.67	5.67	0.16	2.24	11.56

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,596.15	55,521.15
Support	24,400 & 24,260	55,250 & 54,900
Resistance	24,750 & 24,850	55,900 & 56,100

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,567.78	15,564.97	-4,997.19
DII Cash Market	19,629.64	8,765.60	10,864.04

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Hero Motocorp	4660.70	4.15	2121.19
Tech Mahindra	1482.00	1.58	1587.49
JSW Steel	1064.80	1.16	1837.59
Wipro	242.32	0.98	6190.83
Eternal	301.75	0.97	391548.87
Top Losers			
Adani Enterprise	2249.80	-2.20	1529.41
Adani Ports	1345.40	-1.59	2857.41
Trent	5303.50	-0.99	2293.34
Tata Motors	646.50	-0.97	13609.91
Grasim	2743.70	-0.80	591.59

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.39	-0.75	-12.56
WTI (USD/bbl)	63.83	-0.81	-12.72
Gold Spot (USD/t oz.)	3,388.40	0.57	27.48
USD/INR	87.71	0.03	2.41
10 Year G-Sec India	6.386	-0.47	-5.83
US 10 Year Bond	4.246	-0.09	-7.07

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's stock indices overcame initial losses to close flat on Thursday, as news of a US-Russia presidential summit helped markets recover from a drop caused by the US raising duties on Indian exports. The GIFT Nifty was trading 0.10% or 24.50 points higher at 24,657.50

Global

The Dow and S&P 500 eased on Thursday, as shares of Eli Lilly dropped after data from its oral weight loss drug disappointed, while Nasdaq ended slightly higher.

Japan's Topix Index closed at a record high after worries about the impact of US tariffs eased, and increased investor optimism about strong performance of domestic firms.

Hong Kong stocks extended gains into a fourth day, as a strong reading on China trade data bolstered hopes that the world's second-largest economy would sustain growth momentum throughout the year.

Commodities & Currency :

The Indian rupee was largely unchanged, defying pressure from additional US tariffs as expectations of central bank intervention supported the Asian currency.

Gold rose to an over two-week high, buoyed by safe haven demand after US President Donald Trump's tariffs went into effect and US jobs data added to rate-cut expectations.

News:

Life Insurance Corporation of India reported a 5% rise in first-quarter profit, helped by higher premiums from renewed policies, while its margins expanded due to an improvement in its product mix.

Indian jeweller and watchmaker Titan reported a 52.5% rise in first-quarter profit on Thursday, benefiting from higher gold prices, even as budget-conscious consumers traded down to low-carat, lightweight designs.

Russia and India stressed their commitment to a "strategic partnership" in bilateral security talks in Moscow, a day after US President Donald Trump announced higher tariffs on imports from India because of its purchases of Russian oil.

India's JSW Steel has urged the government to raise the company's allocation in quotas to import low-ash metallurgical coke, a steelmaking fuel, to tide over shortfalls, two sources familiar with the matter said.

India's upcoming festive season is expected to lift near-term sentiment among auto dealers, but US tariffs could dent consumer confidence, prompting higher household savings and weighing on discretionary spending, including vehicles, the Federation of Automobile Dealers Association (FADA) said.

AU Small Finance Bank got the banking regulator's 'in-principle' approval to transition into a universal bank, making it the first full-fledged banking licence issued in nearly a decade.