

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,741.00	6.70	0.03	0.47	4.20
BSE Sensex	80,710.76	-7.25	-0.01	0.43	2.81
Bank Nifty	54,114.55	39.10	0.07	0.21	5.98
Nifty Midcap 100	57,075.20	116.05	0.20	0.44	-0.65
Nifty Smallcap 100	17,655.25	33.30	0.19	0.90	-6.88
S&P 500	6,481.50	-20.58	-0.32	1.03	10.44
DJIA	45,400.86	-220.43	-0.48	0.23	7.10
Nasdaq 100	23,652.44	19.43	0.08	1.81	12.76
Nikkei 225	43,018.75	438.48	1.03	1.97	9.44
Hang Seng	25,417.98	359.47	1.43	-0.78	29.53
Shanghai Com	3,812.51	46.64	1.24	-1.63	16.86

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,741.00	54,114.55
Support	24,620 & 24,480	53,700 & 53,560
Resistance	24,910 & 25,000	54,450 & 54,550

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	8,096.45	9,401.36	-1,304.91
DII Cash Market	10,633.48	8,812.25	1,821.23

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eicher Motors	6580.50	2.42	610.72
M&M	3561.30	2.29	3700.94
Maruti Suzuki	14895.00	1.59	473.81
Power Grid Corp	285.35	1.26	9695.91
Dr Reddys Labs	1268.10	1.21	769.86
Top Losers			
ITC	407.35	-2.06	16000.68
HCL Tech	1419.00	-1.68	3895.20
Cipla	1553.40	-1.55	701.87
TCS	3048.30	-1.53	2802.06
Tech Mahindra	1477.90	-1.50	1875.97

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.50	-2.22	-13.74
WTI (USD/bbl)	61.87	-2.54	-15.40
Gold Spot (USD/t oz.)	3,586.69	1.15	34.94
USD/INR	88.27	-0.13	3.06
10 Year G-Sec India	6.465	-0.45	-4.66
US 10 Year Bond	4.074	-2.08	-10.83

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indices closed flat after a volatile Friday, with investors booking gains in consumer companies and a drop in information technology firms offsetting broader gains. As of 6:30 a.m., the GIFT Nifty was trading 0.37% higher at 24,393, implying a bullish open for the NSE Nifty 50 index over the previous close.

Global

US equities closed slightly lower on Friday as investors weighed economic concerns against excitement about the Federal Reserve's interest rate decreases following data showing that US employment growth slowed considerably in August.

Japan stocks were higher after the close on Friday, as gains in the Real Estate, Banking and Textile sectors led shares higher.

Hong Kong stocks recovered from a three-day decline to secure a weekly gain for the benchmark index, as soft data on the US jobs market reinforced bets that the Federal Reserve will cut interest rates this month, and mainland equities recovered losses from the biggest sell-off since the start of a bull run.

Commodities & Currency :

The Indian rupee fell to a lifetime low on Friday, weighed down by concerns over US tariffs, keeping markets on edge despite the likelihood of central bank assistance to contain losses.

Gold's dramatic rally gained new momentum on Friday, with prices just pennies away from \$3,600 per ounce, as disappointing US jobs data increased hopes for bullion-friendly Federal Reserve rate cuts.

News:

India will roll out a package of steps to support exporters impacted by an increase in US tariffs, Finance Minister Nirmala Sitharaman announced.

Top Indian refiner Indian Oil Corp bypassed the acquisition of US oil in its last tender and instead bought 2 million barrels of West African and a million barrels of Middle Eastern quality, according to trade sources.

Due to ongoing complaints from market participants, India's markets regulator started a formal investigation into Jane Street's trading activities, despite its surveillance department's recommendation to the contrary, according to two persons with direct knowledge of the case.

Reliance Infrastructure said that it would sell a 2% stake in its Indian joint venture to Dassault Aviation, giving the French fighter plane producer a 51% ownership.

India will continue to buy Russian oil as long as it is economically viable, its finance minister said on Friday, despite the Trump administration's decision to slap high import taxes on Indian goods due, in part, to its energy purchases from Moscow.

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