

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,839.65	-120.90	-0.47	-1.28	8.83
BSE Sensex	84,666.28	-436.41	-0.51	-1.14	7.84
Bank Nifty	59,222.35	-16.2	-0.03	-0.77	15.98
Nifty Midcap 100	59,676.20	188.10	0.32	-2.24	3.87
Nifty Smallcap 100	17,245.80	194.15	1.14	-3.52	-9.04
S&P 500	6,840.50	-6.00	-0.09	0.50	16.66
DJIA	47,560.29	-179.03	-0.38	0.95	12.61
Nasdaq 100	25,668.69	40.74	0.16	1.12	22.18
Nikkei 225	50,655.10	73.16	0.14	2.74	28.87
Hang Seng	25,434.23	-331.13	-1.29	-2.30	29.61
Shanghai Com	3,909.52	-14.56	-0.37	-0.11	19.83

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,839.65	59,222.35
Support	25,700 & 25,580	58,930 & 58,650
Resistance	25,960 & 26,150	59,450 & 59,690

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,604.94	17,365.02	-3,760.08
DII Cash Market	17,438.88	11,213.99	6,224.89

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	291.70	2.26	27053.86
Titan Company	3849.00	2.18	1121.07
Shriram Finance	846.70	1.49	5737.03
Adani Enterprise	2245.20	1.31	1227.73
Adani Ports	1497.20	1.13	1327.92
Top Losers			
Asian Paints	2796.00	-4.52	1839.39
Tech Mahindra	1561.60	-1.90	1533.61
HCL Tech	1657.60	-1.84	2817.70
Tata Steel	160.67	-1.71	25766.37
Dr Reddys Labs	1246.20	-1.60	2118.27

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	61.89	-0.96	-18.49
WTI (USD/bbl)	58.20	-1.15	-20.42
Gold Spot (USD/t oz.)	4,205.74	0.36	58.24
USD/INR	89.89	0.23	4.95
10 Year G-Sec India	6.590	0.86	-2.82
US 10 Year Bond	4.183	-0.01	-8.81

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian market indexes fell for the second day in a row on Tuesday 09th December, led by information technology firms, as investors remained cautious ahead of the Federal Reserve's rate decision and lingering uncertainty about a US trade deal.

Global

The S&P 500 ended Tuesday's session slightly lower as investors anticipated that the Federal Reserve would take a hawkish tone even if it cuts interest rates this week, while JPMorgan was the heaviest drag on the benchmark index after the biggest US bank warned of hefty expenses for 2026.

Japan's Nikkei share average edged lower on Tuesday, tracking overnight declines on Wall Street, but gains in chip-sector stocks limited losses.

Hong Kong stocks extended their losing run on Tuesday, tracking Wall Street's overnight pullback, as traders priced in an interest-rate cut but grew uneasy about the pace of reductions expected next year.

Commodities & Currency :

The Indian rupee closed moderately higher on Tuesday, boosted by dollar sales from exporters and minor foreign inflows, as traders remained cautious ahead of the US Federal Reserve's policy announcement later this week.

Gold gained on Tuesday as traders remained optimistic ahead of the US Federal Reserve's interest rate decision, while silver rose to hit an unprecedented \$60 per ounce milestone amid supply constraints.

News:

Home prices in India will rise at roughly 6% in the coming two years but most real estate analysts polled by Reuters say the boom in the luxury housing sector currently driving the market will peter out within five years.

Microsoft on Tuesday unveiled \$23 billion in new artificial intelligence investments, with the bulk earmarked for India as the US tech giant deepens its bet on one of the world's fastest-growing digital markets.

India and the European Union will work to seal a long-pending trade deal at the earliest opportunity, New Delhi said on Wednesday, after concluding another round of talks amid signs that a year-end deadline may slip.

The underperformance of India's small-cap firms relative to large- and mid-caps this year, after two years of strong gains, is likely to persist into 2026 as stretched valuations, moderate earnings and thin liquidity continue to weigh, analysts said.

Record-low bids to build battery energy storage systems in India have sparked fears that some projects could be economically unviable and even pose safety risks, industry experts and analysts say, hindering a push for renewable power.

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