

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,487.40	-97.65	-0.40	-0.32	3.14
BSE Sensex	80,235.59	-368.49	-0.46	-0.45	2.20
Bank Nifty	55,043.70	-467.05	-0.84	-1.03	7.80
Nifty Midcap 100	56,324.85	-154.15	-0.27	-0.55	-1.96
Nifty Smallcap 100	17,498.10	6.40	0.04	-0.96	-7.71
S&P 500	6,445.76	72.31	1.13	3.33	9.84
DJIA	44,458.61	483.52	1.10	2.00	4.87
Nasdaq 100	23,839.20	312.57	1.33	4.73	13.65
Nikkei 225	42,718.17	897.69	2.15	4.70	8.68
Hang Seng	24,969.68	62.87	0.25	1.88	27.24
Shanghai Com	3,665.92	18.37	0.50	2.98	12.36

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,487.40	55,043.70
Support	24,450 & 24,230	54,890 & 54,540
Resistance	24,700 & 24,770	55,560 & 56,111

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,532.22	12,931.02	-3,398.80
DII Cash Market	11,888.48	8,380.55	3,507.93

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Maruti Suzuki	12840.00	1.93	504.48
Tech Mahindra	1509.30	1.90	2532.94
Hero Motocorp	4645.20	1.82	723.77
M&M	3236.50	1.58	3315.98
NTPC	340.10	1.18	7221.18
Top Losers			
Bajaj Finance	853.00	-2.83	8257.31
Trent	5365.50	-1.43	441.84
HUL	2483.80	-1.37	1406.21
HDFC Bank	1969.90	-1.29	6468.90
Nestle	1091.10	-1.26	758.20

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.10	-0.80	-12.95
WTI (USD/bbl)	63.19	-1.20	-13.59
Gold Spot (USD/t oz.)	3,349.12	0.20	26.01
USD/INR	87.71	-0.06	2.40
10 Year G-Sec India	6.492	0.81	-4.27
US 10 Year Bond	4.283	-0.14	-6.26

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity indices fell slightly on Tuesday, as a decline in financials weighed ahead of key US and domestic inflation measures. The GIFT Nifty was up 0.05% or 12.50 points at 24,631.50 as of 6:45 a.m. This indicated that the NSE Nifty 50 index might open 144 points higher than its previous closing.

Global

The S&P 500 and the Nasdaq scored record closing highs on Tuesday, as news that July inflation rose broadly in line with expectations bolstered bets on a Federal Reserve interest rate cut next month.

Japan's Nikkei share gauge powered to an all-time high, swept up by sharp gains for tech stocks, as it caught up with peaks scaled earlier this year by other major global stock markets.

Hong Kong stocks traded in a narrow range, as traders looked past the US tariff pause extension to focus on economic data and earnings.

Commodities & Currency :

The Indian rupee was largely unchanged on Tuesday with traders in "wait and watch" mode awaiting the release of key inflation data in the US and India later in the day, which could provide clues on the interest rate trajectories in the two economies.

Gold prices edged higher after US inflation data sustained expectations of Federal Reserve interest rate cuts, while attention turned to other key economic data due this week.

News:

India's retail inflation in July eased below 2% for the first time in eight years, on the back of falling prices of food items including vegetables and pulses, hurting some farmers, but will have limited impact on the central bank's policy decision.

India's state oil refiners will continue to use annual contracts to secure oil supplies and hedge against market volatilities as the future of cheap Russian purchases is in doubt, the oil ministry said in a report to parliament.

India's Apollo Hospitals Enterprise plans to double its investment in artificial intelligence capabilities over the next two to three years, its CEO said, after the company beat first-quarter profit estimates on higher patient volume.

Drugmaker Abbott India reported an 11.5% rise in first-quarter profit, driven by healthy sales in its mainstay pharmaceuticals segment.

India's microfinance industry has sought credit guarantee support of up to 200 billion rupees (\$2.2 billion) from the government to spur loan growth in a sector grappling with higher borrowing costs, senior industry officials said.

State-run explorer Oil India reported a sharp drop in first-quarter profit, while falling short of analysts' expectations, due to softer oil prices, even as demand remained upbeat.

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