AJCONGLOBAL
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Daily Market Insight

~ Where the market left its footprints 15th July 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,082.30	-67.55	-0.27	-1.80	5.64
BSE Sensex	82,253.46	-247.01	-0.30	-1.73	4.77
Bank Nifty	56,765.35	10.65	0.02	-1.21	11.17
Nifty Midcap 100	59,052.55	410.35	0.70	-1.17	2.79
Nifty Smallcap 100	18,954.95	191.5	1.02	-0.53	-0.03
S&P 500	6,268.56	8.81	0.14	1.14	6.82
DJIA	44,459.65	88.14	0.20	-0.08	4.88
Nasdaq 100	22,855.63	75.03	0.33	1.68	8.96
Nikkei 225	39,459.62	-110.06	-0.28	-1.32	0.39
Hang Seng	24,203.32	63.75	0.26	-0.07	23.34
Shanghai Com	3,519.65	9.47	0.27	1.79	7.88

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,082.30	56,765.35
Support	24,980 & 25,850	56,530 & 56,250
Resistance	25,230 & 25,350	56,930 & 57,370

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,054.46	18,668.78	-1,614.32
DII Cash Market	14,561.52	12,773.84	1,787.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	270.60	2.75	50,184.66
Titan Company	3,404.70	1.28	755.78
IndusInd Bank	867.60	1.02	3,605.77
ONGC	244.22	1.02	7,568.91
Adani Enterprise	2,581.30	0.88	536.59
Top Losers			
Jio Financial	319.10	-2.06	17,980.89
Tech Mahindra	1,576.70	-1.61	2,068.34
Bajaj Finance	918.85	-1.57	6,657.98
Wipro	254.25	-1.57	10,388.42
Asian Paints	1,570.30	-1.54	9,173.43

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.14	-1.52	-8.94
WTI (USD/bbl)	67.07	-2.02	-8.29
Gold Spot (USD/t oz.)	3,349.35	-0.19	26.02
USD/INR	85.99	-0.22	0.40
10 Year G-Sec India	6.316	0.27	-6.86
US 10 Year Bond	4.429	-0.09	-3.06

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indexes fell on Monday, as concerns about dismal quarterly reports from information technology companies outweighed gains in other sectors. The GIFT Nifty was trading around 25,100 early Tuesday. The Nifty 50 futures contract was up 0.05% at 25,163.5 as of 6:44 a.m., indicating a positive start for the Indian markets.

Global

US equities rose modestly, as investors hoped that President Donald Trump's freshly promised tariffs will be dialed back before the August 1 deadline.

Japan's Nikkei stock index fell for the third day in a row, driven down by fears about an upcoming domestic election and unresolved trade talks with the United States.

Chinese equities gained as exports increased in June amid a trade truce between the United States and China.

Commodities & Currency :

The Indian rupee fell, reaching its lowest level in more than two weeks, driven by corporate dollar demand and equity-related outflows, dealers said, amid uncertainty about US trade plans.

Gold prices fell after reaching a three-week high, as attention shifted to trade talks and US economic data, while silver rose to its highest level since September 2011.

News:

Jane Street, the US high-frequency trading firm accused of market manipulation by Indian authorities, has put $567 million in an escrow account to continue trading in the nation.

Ola Electric of India expects to improve gross margins in fiscal 2026 after achieving a reduced sequential loss in the first quarter, aided by stronger sales of its newer, more cost-effective scooter models.

India's wholesale price index declined 0.13% year on year in June, its first drop in 19 months, mostly due to a decline in prices of food goods, basic metals, mineral oils, and energy, according to official statistics.

An Indian trade delegation has reached Washington for fresh talks on a trade deal with the United States, two Indian government sources said

HCLTech, India's third-largest software services provider, reported better-than-expected quarterly revenue, aided by growth in Europe and "rest of world" geographies.

Nelco declined 4.37% as its consolidated net profit fell 60.52% to Rs 1.80 crore in Q1 FY26, from Rs 4.56 crore in Q1 FY25. However, overall income increased by 1.57% year on year to Rs 75.36 crore in the first quarter of FY26.

Tata Technologies announced a smaller-than-expected revenue decline for the first quarter, owing to good deal wins and contract execution in a challenging macroeconomic climate.

Anthem Biosciences launched its IPO on Monday, July 14. The IPO will close on Wednesday, July 16. This IPO is an offer-for-sale (OFS) of ₹3,395 crore from promoters, investors, and selling shareholders.