

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
<b>Global</b>					
Nifty 50	24,946.50	227.90	0.92	0.93	5.07
BSE Sensex	81,796.15	677.55	0.84	0.52	4.19
Bank Nifty	55,944.90	417.55	0.75	0.07	9.57
Nifty Midcap 100	58,768.50	541.05	0.93	1.72	2.29
Nifty Smallcap 100	18,549.20	174.4	0.95	2.51	-2.17
S&P 500	6,033.11	56.14	0.94	1.64	2.80
DJIA	42,515.09	317.3	0.75	0.50	0.29
Nasdaq 100	21,937.57	306.53	1.42	2.07	4.59
Nikkei 225	38,501.08	189.75	0.50	2.75	-2.05
Hang Seng	24,010.28	-50.71	-0.21	3.68	22.36
Shanghai Com	3,383.07	-5.659	-0.17	0.63	3.69

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,946.50	55,944.90
Support	24,700 & 24,500	55,415 & 54,950
Resistance	25,080 & 25,240	56,510 & 56,970

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,029.64	12,569.06	-2,539.42
DII Cash Market	14,147.65	8,366.69	5,780.96

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
BHEL	403.85	2.45	32,061.75
SBI Life Ins	1797.80	2.43	728.05
Ultra Tech Cement	11495.00	2.41	401.10
HDFC Life	770.55	2.35	2,304.69
ONGC	256.79	2.10	41,444.12
<b>Top Losers</b>			
Tata Motors	1405.00	-3.57	31,246.33
Dr Reddys Labs	413.90	-1.15	1,294.66
Adani Ports	792.35	-0.31	2,823.30
Sun Pharma	816.85	-0.15	2,249.33

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	73.43	-1.95	-3.29
WTI (USD/bbl)	71.45	-2.19	-1.34
Gold Spot (USD/t oz.)	3,413.44	-0.53	28.43
USD/INR	86.06	0.04	0.48
10 Year G-Sec India	6.273	-1.34	-7.49
US 10 Year Bond	4.432	0.72	-2.99

Source: Bloomberg

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## MARKET COMMENTARY

### Equity :

#### India

India's market indexes climbed on Monday, recovering from early range-bound trades as gains in IT and financial equities outweighed caution caused by the ongoing Israel-Iran confrontation. However, Indian equity markets are expected to open lower amid escalating tensions in West Asia, with mixed cues from Asian peers and a slight dip in GIFT Nifty.

#### Global

U.S. stocks closed higher on Monday, as oil prices retreated after the Israel-Iran attacks left crude production and exports unaffected, easing investor concerns about the potential for higher energy prices to stoke inflation. However, U.S. stock futures dipped on Tuesday morning as tensions in the region escalated further.

Japan's stock market ended a two-day losing streak on Monday, closing higher with gains led by the real estate, banking, and textile sectors.

China and Hong Kong stocks were flat as investors analysed conflicting macroeconomic data and remained cautious amid lingering geopolitical tensions that dampened risk appetite.

### Commodities & Currency :

Oil prices dipped \$1 per barrel on Monday in volatile trade on reports that Iran is seeking an end to hostilities with Israel, enhancing the prospect of a truce and alleviating concerns about a disruption to regional crude supply.

The Indian rupee closed 3 paise higher at 86.06 against the US dollar on Monday, rebounding from an initial drop as a narrower trade deficit in May eased pressure on the currency.

Gold fell more than 1% as traders grabbed profits after prices reached an eight-week high, with the market focusing on Israel-Iran tensions and the Federal Reserve's policy meeting this week.

### News:

India's goods trade deficit fell substantially to \$21.88 billion in May, supported by a drop in imports and a seasonal increase in exports, according to government figures released.

India's wholesale inflation in May dropped to 0.39% year on year from 0.85% in April, according to government data.

India's jobless rate increased to 5.6% in May from 5.1% in April, primarily due to a reduction in farm activity following the conclusion of the harvest season, according to the statistics ministry.

Tata Motors fell 3.56% as its UK-based unit, Jaguar Land Rover (JLR), issued a lower outlook for FY26, weighing on market sentiment. JLR estimates an EBIT margin of 5-7% in FY26, down from 8.5% in FY25.

HBL Engineering's stock rose 2.75% after the business reported that it has obtained a contract worth Rs 132.95 crore from South Central Railway for the deployment of the indigenously developed Kavach safety system