

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,860.10	-167.2	-0.64	-1.21	8.92
BSE Sensex	84,679.86	-533.5	-0.63	-1.12	7.86
Bank Nifty	59,034.60	-427.2	-0.72	-1.08	15.62
Nifty Midcap 100	59,710.80	-502.00	-0.83	-2.18	3.93
Nifty Smallcap 100	17,265.15	-160.7	-0.92	-3.41	-8.94
S&P 500	6,800.26	-16.25	-0.24	-0.18	15.88
DJIA	48,114.26	-302.3	-0.62	1.74	13.50
Nasdaq 100	25,132.94	65.67	0.26	-0.83	19.82
Nikkei 225	49,383.29	-784.82	-1.56	0.16	25.63
Hang Seng	25,235.41	-393.47	-1.54	-3.06	28.60
Shanghai Com	3,824.81	-43.11	-1.11	-2.28	17.23

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,860.10	59,034.60
Support	25,730 & 25,600	58,800 & 58,650
Resistance	25,980 & 26,100	59,500 & 59,680

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,464.52	12,846.44	-2,381.92
DII Cash Market	12,488.98	11,411.50	1,077.48

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Titan Company	3929.50	1.64	1560.83
Bharti Airtel	2102.00	1.56	5756.69
TATA Cons. Prod	1169.90	1.08	1181.78
Bajaj Auto	9008.00	0.76	278.90
Asian Paints	2790.90	0.38	916.24
<b>Top Losers</b>			
Axis Bank	1219.60	-5.07	11542.05
Eternal	284.45	-4.69	58633.75
JSW Steel	1082.60	-2.89	2000.33
HCL Tech	1651.70	-1.92	1929.31
Tata Steel	169.83	-1.76	22981.94

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	59.08	-2.44	-22.26
WTI (USD/bbl)	55.42	-2.46	-24.22
Gold Spot (USD/t oz.)	4,308.31	0.20	61.93
USD/INR	91.03	-0.33	6.29
10 Year G-Sec India	6.575	-0.27	-3.05
US 10 Year Bond	4.161	0.38	-8.94

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's market indices fell for the second day in a row on Tuesday, with the rupee falling above 91 per dollar as investors grapple with continuing foreign outflows and a trade deal with the United States that remains elusive. The Gift Nifty futures were trading at 25,925 points as of 7:40 a.m. IST, indicating that the benchmark Nifty 50 will open near Tuesday's close of 25,860.1.

#### Global

The Nasdaq recovered on Tuesday to close higher while the S&P 500 and the Dow closed lower, impacted by declines in healthcare and energy stocks. Investors evaluated delayed economic data to gauge the Federal Reserve's monetary policy outlook for next year.

Japan's Nikkei share average dropped more than 1% on Tuesday, weighed down by declines in chip and other artificial intelligence-linked stocks ahead of crucial US employment data later in the day.

Concerns about China's deteriorating growth prospects dragged Hong Kong stocks to their lowest level in three weeks, while investors refrained from fresh bets before a US jobs report that could determine the Federal Reserve's interest-rate path.

### Commodities & Currency :

The Indian rupee breached the 91-per-dollar threshold for the first time on Tuesday, pressured by increased hedging activity and portfolio outflows amid a deadlock in trade negotiations between the US and India.

Gold rose on Tuesday after a U.S. jobs report showed the unemployment rate rose last month from September, reinforcing bets of rate cuts by the US Federal Reserve and sending the dollar index lower.

### News:

India's private sector activity expanded at its weakest pace in 10 months in December on a slowdown in new orders and hiring slowed to a near-standstill, according to a survey of private businesses

HSBC's Flash India Composite Purchasing Managers' Index (PMI), compiled by S&P Global, fell to 58.9 this month from 59.7 in November, marking the lowest reading since February. The 50 mark separates growth from contraction.

India's central bank has approved HDFC Bank's subsidiaries to acquire up to a 9.5% stake in smaller peer IndusInd Bank, the country's largest private sector lender by market value said late on Monday.

CICI Prudential Asset Management received bids worth 3 trillion rupees (\$33 billion) for its IPO, making it the fourth most subscribed IPO in India.

India has presented legislation to expand a 20-year-old rural employment scheme by boosting the number of guaranteed workdays but opposition leaders challenged plans to remove independence hero Mahatma Gandhi's name from the programme.

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