

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
<b>Global</b>					
Nifty 50	24,853.40	-93.1	-0.37	0.55	4.68
BSE Sensex	81,583.30	-212.85	-0.26	0.26	3.92
Bank Nifty	55,714.15	-230.75	-0.41	-0.34	9.11
Nifty Midcap 100	58,379.30	-389.2	-0.66	1.04	1.62
Nifty Smallcap 100	18,420.35	-128.85	-0.69	1.79	-2.85
S&P 500	5,982.72	-50.29	-0.84	1.18	2.34
DJIA	42,215.80	-299.29	-0.70	1.08	0.87
Nasdaq 100	21,719.08	-218.49	-1.00	1.42	3.92
Nikkei 225	38,536.74	225.41	0.59	2.85	-1.96
Hang Seng	23,980.30	-80.69	-0.34	3.55	22.20
Shanghai Com	3,387.41	-1.324	-0.04	0.76	3.83

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,853.40	81,583.30
Support	24,700 & 25,510	55,129 & 54,590
Resistance	25,080 & 25,240	56,770 & 56,970

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,581.10	12,098.33	1,482.77
DII Cash Market	19,427.32	11,220.13	8,207.19

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Tech Mahindra	1718.60	1.46	2105.13
Infosys	1639.90	0.99	7622.08
Asian Paints	2264.80	0.89	1540.99
TCS	3515.30	0.54	2111.94
Maruti Suzuki	12595.00	0.52	226.60
<b>Top Losers</b>			
Adani Enterprise	2488.50	-2.18	703.34
Dr Reddys Labs	1318.80	-2.08	1649.46
Sun Pharma	1650.20	-2.08	5408.29
Eternal	247.25	-1.94	20651.97
ONGC	252.31	-1.74	18781.10

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	76.79	0.44	1.13
WTI (USD/bbl)	75.21	0.55	2.90
Gold Spot (USD/t oz.)	3,390.59	0.20	27.36
USD/INR	86.24	-0.21	0.69
10 Year G-Sec India	6.265	-0.13	-7.62
US 10 Year Bond	4.401	0.27	-3.55

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's benchmark indexes down on Tuesday as investors remained concerned after US President Donald Trump urged Iranians to flee Tehran, escalating fears of a wider regional confrontation amid ongoing Israel-Iran hostilities. Gift Nifty traded lower signalling that Dalal street was headed for a negative start on Wednesday.

#### Global

US markets finished lower as the Israel-Iran dispute raged for a fifth day, raising investor concerns, with the US military sending fighter jets to the Middle East.

Japanese stocks bucked the regional trend, reaching a four-month high as Bank of Japan Governor Kazuo Ueda warned against fast bond cutting.

Mainland China and Hong Kong stocks closed down pulled down by further signs of Middle East tensions following US President Donald Trump's call for Iranians to leave Tehran.

### Commodities & Currency :

The Indian rupee fell to its lowest level in more than two months, weighed down by concerns about geopolitical tensions in the Middle East and US President Donald Trump's suggestion that pharmaceutical tariffs would be imposed soon.

Gold prices surged as the conflict between Israel and Iran spurred investors to seek sanctuary in safe-haven assets, while also anticipating the impending US Federal Reserve policy meeting.

### News:

India's markets regulator has granted requests from the National Stock Exchange of India and the BSE to alter the expiry dates of equities derivatives contracts to Tuesdays and Thursdays, respectively, the exchanges said.

Hindustan Zinc, India's largest producer of refined metal, has approved a project worth 120 billion rupees (\$1.39 billion) as it prepares to scale up capacity, the miner said.

According to government data, half of India's electricity generation capacity might be based on non-fossil fuels as early as December this year, while the share of renewables in the country's energy consumption mix is expected to remain low at 13-15 percent.

Godrej Properties' stock climbed 1.27% after the business announced the acquisition of an approximately 16-acre property tract in Upper Kharadi, Pune. The project will have a developable area of 2.5 million square feet and a revenue potential of approximately Rs 3,100 crore.

Tata Consultancy Services (TCS) gained 0.57%. The company has partnered with the Council of Europe Development Bank (CEB) to modernize processes and increase efficiency through advanced automation.

Reliance Infrastructure has announced the allotment of 1.25 crore shares worth Rs 300 crore following the rapid conversion of warrants.

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