

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,111.45	-100.6	-0.40	-1.68	5.76
BSE Sensex	82,259.24	-375.24	-0.45	-1.72	4.78
Bank Nifty	56,828.80	-340.15	-0.59	-1.10	11.30
Nifty Midcap 100	59,519.10	-101.55	-0.17	-0.39	3.60
Nifty Smallcap 100	19,117.30	-22.75	-0.12	0.32	0.83
S&P 500	6,297.36	33.66	0.54	1.60	7.31
DJIA	44,484.49	229.71	0.52	-0.02	4.94
Nasdaq 100	23,081.05	173.08	0.76	2.68	10.04
Nikkei 225	39,901.19	237.79	0.60	-0.21	1.51
Hang Seng	24,498.95	-18.81	-0.08	1.15	24.85
Shanghai Com	3,516.83	13.05	0.37	1.71	7.79

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,111.45	56,828.80
Support	25,000 & 24,850	56,530 & 56,250
Resistance	25,260 & 25,380	57,190 & 57,400

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,633.02	15,327.33	-3,694.31
DII Cash Market	13,523.36	10,702.59	2,820.77

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TATA Cons. Prod	1105.80	2.25	1193.26
Tata Steel	159.90	1.63	21733.24
Hindalco	674.55	1.17	4022.12
Trent	5417.50	0.66	490.08
Titan Company	3433.30	0.47	559.48
Top Losers			
Tech Mahindra	1563.70	-2.75	7617.30
IndusInd Bank	865.10	-1.67	4185.12
Infosys	1583.50	-1.52	7374.81
SBI Life Insura	1802.80	-1.44	886.19
HCL Tech	1543.90	-1.21	4966.08

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.44	1.34	-8.38
WTI (USD/bbl)	67.62	1.64	-7.53
Gold Spot (USD/t oz.)	3,337.69	-0.28	25.58
USD/INR	86.08	-0.16	0.50
10 Year G-Sec India	6.301	-0.17	-7.08
US 10 Year Bond	4.439	-0.27	-2.84

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dipped on Thursday, driven down by losses in IT sectors after Tech Mahindra missed quarterly sales projections, while investors were cautious due to uncertainties about US Federal Reserve Chair Jerome Powell's stay. The GIFT Nifty was trading around 25,200 early Friday. As of 7:05 a.m., the benchmark Nifty 50 futures contract was up 0.20% at 25,190, signalling that the Indian markets are off to a positive start.

Global

The S&P 500 stock index and the Nasdaq Composite both closed at new highs, as investors celebrated excellent economic data and earnings reports indicating that American consumers remained willing to spend.

Japan's Nikkei share average recovered from early losses to end with solid gains as a weakening yen bolstered sentiment, while chip shares pared declines after Taiwanese chipmaker TSMC posted record earnings.

Hong Kong stocks tumbled as China committed to reduce "irrational competition" in the electric vehicle (EV) sector, which aligns with the government's larger "anti-involution" push to promote healthy economic growth.

Commodities & Currency :

The Indian rupee fell above a crucial support level, hitting a three-week low, weighed down by a generally stronger dollar, despite exporter dollar sales and portfolio inflows helping the local currency contain its losses.

Gold prices edged lower, weighed down by a stronger dollar and robust US economic data, while caution persisted as markets awaited clarity on tariff developments.

News:

Wipro beat June-quarter estimates as improved client spending in parts of its Americas business boosted performance and forecast current-quarter revenue in line with expectations.

Axis Bank, India's fourth-largest private lender by market value, posted an unexpected drop in first-quarter profit as its bad loans surged after a one-time industry benchmarking exercise.

DLF, India's largest property developer, intends to assess offers from potential partners as it works on a project to create luxury flats in a slum area of Mumbai, marking its return to the city, it said.

India's state-run Oil and Natural Gas Corporation is exploring building a 200,000-240,000 barrels per day refinery at Jamnagar in the western Indian state of Gujarat, a company source.

HDFC Asset Management Company added 2.86% after the company's standalone net profit rose 23.83% to Rs 747.92 crore on 26.58% surge in total income to Rs 1,200.44 crore in Q1 FY26 over Q1 FY25.

Mahindra Logistics' stock rose 6.66% to Rs 415.40 after the board approved the details of its planned rights issue.

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