

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,815.55	-3.00	-0.01	-1.38	8.73
BSE Sensex	84,481.81	-77.84	-0.09	-1.35	7.61
Bank Nifty	58,912.85	-13.9	-0.02	-1.29	15.38
Nifty Midcap 100	59,592.15	203.30	0.34	-2.38	3.73
Nifty Smallcap 100	17,160.20	21.65	0.13	-4.00	-9.49
S&P 500	6,774.76	53.33	0.79	-0.56	15.44
DJIA	47,951.85	65.88	0.14	1.40	13.11
Nasdaq 100	25,019.37	371.76	1.51	-1.28	19.28
Nikkei 225	49,001.50	-510.78	-1.03	-0.61	24.66
Hang Seng	25,498.13	29.35	0.12	-2.06	29.94
Shanghai Com	3,876.37	6.09	0.16	-0.96	18.81

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,815.55	58,912.85
Support	25,730 & 25,600	58,640 & 58,250
Resistance	25,930 & 26,050	59,150 & 59,500

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,442.37	10,846.59	595.78
DII Cash Market	12,375.71	9,675.35	2,700.36

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Interglobe Avi	5115.50	2.71	4260.90
TCS	3280.80	1.96	2307.42
Max Healthcare	1048.50	1.69	5152.76
Tech Mahindra	1605.60	1.66	1748.78
Infosys	1626.80	1.55	6577.29
Top Losers			
Sun Pharma	1745.90	-2.62	3461.35
Tata Steel	168.12	-1.30	13152.38
Power Grid Corp	257.95	-1.21	10930.75
Asian Paints	2759.70	-0.93	417.99
NTPC	318.50	-0.86	5554.19

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	59.94	0.30	-21.43
WTI (USD/bbl)	56.28	0.38	-23.42
Gold Spot (USD/t oz.)	4,322.91	-0.36	62.29
USD/INR	90.25	0.14	5.37
10 Year G-Sec India	6.574	-0.38	-3.06
US 10 Year Bond	4.129	0.19	-9.62

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Thursday 18th December, Indian equity indices struggled for direction before finishing lower for the fourth straight session, as a dearth of fresh triggers left investors cautious, although gains in information technology sectors helped to limit broader market declines. The Gift Nifty futures were trading at 25,952.5 points as of 7:38 am, indicating that the benchmark Nifty 50 will open above Thursday's close of 25,815.55.

Global

Wall Street's main indexes closed higher on Thursday as a soft inflation report fed expectations for interest rate cuts by the Federal Reserve, while chipmaker Micron's blowout forecast signaled strong AI demand. Japan's Nikkei fell 1.03% and Topix declined 0.37% as tech stocks slid amid global AI valuation concerns and reports of a data-center funding pullback. Markets remained cautious ahead of the Bank of Japan meeting, with a 25 bps rate hike widely expected.

Hong Kong stocks traded sideways with technology stocks retreating on growing anxiety that a global boom in artificial intelligence could turn into a bubble.

Commodities & Currency :

The Indian rupee extended gains slightly on Thursday, after rebounding from a record low in the previous session following central bank market intervention, which also contributed to a rise in merchant dollar sales, traders said.

Gold prices edged lower on Thursday as markets digested softer-than-expected US inflation data, reducing the yellow metal's appeal as an inflation hedge, while support from a higher November unemployment rate limited further losses.

News:

India signed an economic partnership agreement with Oman on Thursday to boost bilateral trade and investment as it seeks to expand Middle East ties and diversify trade to beat steep US tariffs.

India's parliament approved on Thursday a landmark atomic energy bill that allows private and foreign companies to enter the nuclear power sector, as the energy-hungry country targets a tenfold jump in nuclear power capacity to 100 gigawatts by 2047.

India aims to shield sugarcane farmers from income losses by managing surplus supplies through exports and diverting more sugar for ethanol production, a senior government official said on Thursday.

Japan's Sumitomo Realty and Development, the country's third-largest developer, plans to expand in India with an unusual strategy: focusing on Mumbai and managing apartments rather than selling them, executives told Reuters.

India has reformed its business visa regime to ease movement of foreign engineers and technicians, the government said in a statement, which will be a boost local firms leaning on Chinese professionals for manufacturing services.

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~ Where the market left its footprints

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