



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
<b>Global</b>					
Nifty 50	24,793.25	-18.8	-0.08	0.31	4.42
BSE Sensex	81,361.87	-82.79	-0.10	-0.01	3.64
Bank Nifty	55,577.45	-251.3	-0.45	-0.58	8.85
Nifty Midcap 100	57,159.95	-949.25	-1.63	-1.07	-0.51
Nifty Smallcap 100	18,013.10	-365.35	-1.99	-0.46	-4.99
S&P 500	5,980.87	-1.85	-0.03	0.76	1.91
DJIA	42,171.66	-44.14	-0.10	-0.32	-0.52
Nasdaq 100	21,719.69	0.61	0.00	1.06	3.55
Nikkei 225	38,488.34	-396.81	-1.02	2.72	-2.08
Hang Seng	23,237.74	-472.95	-1.99	0.34	18.42
Shanghai Com	3,362.11	-26.701	-0.79	0.00	3.05

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,793.25	81,361.87
Support	24,680 & 24,460	55,100 & 54,800
Resistance	25,000 & 25,240	56,050 & 56,508

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,011.23	11,076.61	934.62
DII Cash Market	11,132.90	10,526.93	605.97

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
TATA Cons. Prod	1088.30	2.17	2,816.40
Eicher Motors	5493.50	1.86	923.40
M&M	3094.80	1.77	2,482.92
Wipro	265.58	1.53	14,184.49
Apollo Hospital	7009.50	1.10	462.08
<b>Top Losers</b>			
Adani Ports	1338.00	-2.52	2,950.28
Bajaj Finance	900.50	-2.01	6,585.94
Adani Enterprise	2420.60	-1.57	688.21
Coal India	384.25	-1.56	4,416.37
Tech Mahindra	1684.00	-1.56	3,056.88

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	77.03	-2.13	1.42
WTI (USD/bbl)	75.61	0.63	3.47
Gold Spot (USD/t oz.)	3,352.33	-0.55	26.13
USD/INR	86.73	-0.30	1.27
10 Year G-Sec India	6.309	0.77	-6.96
US 10 Year Bond	4.394	-0.05	-3.90

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's equity benchmarks were restrained on Thursday, while the broader markets fell, as investors remained cautious in the face of growing Middle East tensions and hawkish US monetary policy cues. As of 6:37 a.m., the GIFT Nifty was up 0.19% or 46 points to 24,803.00, implying a stronger open for the Nifty 50.

#### Global

The S&P 500 finished roughly flat, giving up earlier gains as Federal Reserve Chair Jerome Powell said inflation in goods prices is expected to rise over the summer as President Donald Trump's tariffs reach consumers.

Japan equities fell after the market closed, with losses in the Paper & Pulp, Transport, and Communication sectors driving shares lower.

Hong Kong stocks fell the most in two months as the Federal Reserve warned of rising tariff-induced inflationary pressures on the economy, while the Middle East crisis interrupted global oil supply.

### Commodities & Currency :

The Indian rupee plummeted to its lowest level since mid-March as risk aversion seized financial markets, with investors concerned about the likelihood of US involvement in the Israel-Iran war.

Gold prices were little changed, as heightened geopolitical concerns offset pressure from the Federal Reserve's aggressive stance.

Oil prices rose nearly 3% as a week-old air war between Israel and Iran continued, and investors remained concerned about future US participation.

### News:

Nestle India will consider issuing bonus shares at a board meeting scheduled on June 26, the consumer goods company said.

Amazon will invest more than 20 billion rupees (\$233 million) in India in 2025 to grow and modernize its operations infrastructure, create new technology for its fulfilment network, and improve delivery safety, the company stated.

India's central bank said it would require lenders to set aside 1% of the value of loans for under-construction infrastructure projects to cover potential losses, easing its earlier draft proposal that envisaged provisioning rising up to 5%, following an appeal by lenders.

India's United Spirits is buying the manufacturer of popular craft gins 'Greater Than' and 'Hapusa' in a deal of 1.3 billion rupees (\$15.2 million), including debt, in a drive to enhance its premium portfolio.

The Jawaharlal Nehru Port Authority intends to raise \$3.5 billion debt for the Vadhvan Port Project.

Siemens Energy India's shares were listed at Rs 2,850 during a special pre-opening session on Thursday. The company was demerged from Siemens Ltd on April 7, 2025, and the stock price for the spun-off entity was valued at Rs 2,368.8 per share.

Container Corp, Kaynes Technology India Ltd., Nestle India Ltd., and Uno Minda Ltd. are among the stocks that will be closely watched today as a result of overnight news flow.

### Disclaimer:

Ajcon Global Services Limited is a SEBI registered Research Analyst (INH000001170). This report is for informational purposes only and not an offer or solicitation to buy/sell securities. Investments in the securities market are subject to market risks; please read all related documents carefully before investing. The views expressed are based on publicly available information believed to be reliable, but no assurance is given for its accuracy or completeness. Ajcon and its associates may have commercial relationships with companies mentioned. Investors are advised to exercise independent judgment and consult their financial advisor before making investment decisions. For detailed Disclosure and Disclaimer, please click the below link: <http://ajcononline.com/disclosure-and-disclaimer-2/>