

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	26,052.65	142.6	0.55	1.12	9.73
BSE Sensex	85,186.47	513.45	0.61	1.44	8.51
Bank Nifty	59,216.05	316.8	0.54	1.92	15.97
Nifty Midcap 100	60,949.05	127.05	0.21	1.10	6.09
Nifty Smallcap 100	18,075.95	-78.8	-0.43	-2.36	-4.66
S&P 500	6,642.16	24.84	0.38	-3.06	13.18
DJIA	46,138.77	47.03	0.10	-2.53	8.84
Nasdaq 100	24,640.52	137.42	0.56	-5.13	17.47
Nikkei 225	48,537.70	-165.28	-0.34	-5.75	23.48
Hang Seng	25,830.65	-99.38	-0.38	-1.25	31.63
Shanghai Com	3,946.74	6.93	0.18	-0.75	20.97

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,052.65	59,216.05
Support	25,900 & 25,820	58,790 & 58,600
Resistance	26,130 & 26,210	59,521 & 59,730

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,774.92	13,194.20	1,580.72
DII Cash Market	13,904.32	12,544.05	1,360.27

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Max Healthcare	1164.40	4.27	5964.54
HCL Tech	1662.60	4.23	6342.67
Infosys	1541.10	3.68	10981.13
Wipro	246.07	2.15	13298.45
TCS	3147.70	1.96	3151.05
Top Losers			
TMPV	360.85	-2.81	17854.52
Coal India	379.05	-1.28	5332.64
Maruti Suzuki	15768.00	-1.02	286.43
Bajaj Finance	1005.60	-0.79	5158.83
Hindalco	790.95	-0.78	3005.73

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.52	-2.11	-16.38
WTI (USD/bbl)	59.44	-2.14	-18.72
Gold Spot (USD/t oz.)	4,077.93	0.26	53.43
USD/INR	88.59	0.03	3.43
10 Year G-Sec India	6.488	0.05	-4.32
US 10 Year Bond	4.137	0.00	-9.46

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares recovered from early fears and edged closer to record highs, likely boosted by foreign inflows and a rebound in information-technology sectors.

Global

US stocks ended a choppy session higher on Wednesday, rebounding from recent losses as technology stocks rose ahead of Nvidia's quarterly results.

Japan's Nikkei share gauge lost ground for a fourth day on Wednesday as investors remained wary ahead of pivotal earnings from artificial intelligence heavyweight Nvidia.

Hong Kong stocks fell for a fourth day, with investors taking their cue from Wall Street's overnight decline amid rising doubts over lofty artificial intelligence valuations and the timing of US rate cuts.

Commodities & Currency :

The rupee closed practically steady on Wednesday, sliding from a two-week high as importer dollar demand ate into gains driven by increased exporter flows and a moderately optimistic bias among interbank dealers.

Gold prices rose, as investors flocked to the safe-haven asset ahead of the release of the Federal Reserve's latest meeting minutes later in the day and delayed US employment data on Thursday.

News:

India's corporate earnings are staging their strongest recovery in over a year, with brokerages turning upbeat on profit growth for the second half as they expect a broader rebound in consumption.

Indian seafood exporters surged as much as 11% following media report that China had notified Japan of plans to suspend imports from the country, a move that could shift demand toward alternative suppliers such as India.

India's Adani Enterprises said on Wednesday that creditors of Jaiprakash Associates have approved its takeover proposal for the bankrupt infrastructure group.

Indian enterprise artificial intelligence firm Fractal Analytics plans to maintain high research and development spending ahead of its market debut for which a date has not yet been set, a top executive said.

Indian miner Hindustan Copper said an accident at its copper project in Madhya Pradesh state led to the death of an employee.

Alcohol industry groups representing Heineken, Diageo and Pernod Ricard have urged the southern Indian state of Telangana to settle \$337 million in overdue payments, saying further delay risks supply shortages and threaten business continuity, a letter seen by Reuters shows.

The CEO of India's steel-to-power conglomerate JSW Group's copper business Pankaj Kumar has resigned from the company, two sources familiar with the matter said on Wednesday, citing the group's shift in focus towards steel and EVs.

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