

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,090.70	122.3	0.49	-1.77	5.68
BSE Sensex	82,200.34	442.61	0.54	-1.79	4.70
Bank Nifty	56,952.75	669.75	1.19	-0.88	11.54
Nifty Midcap 100	59,468.35	363.85	0.62	-0.47	3.51
Nifty Smallcap 100	18,958.30	-1.35	-0.01	-0.51	-0.01
S&P 500	6,305.60	8.81	0.14	1.74	7.45
DJIA	44,323.07	-19.12	-0.04	-0.39	4.55
Nasdaq 100	23,180.06	114.59	0.50	3.12	10.51
Nikkei 225	39,819.11	-82.08	-0.21	-0.42	1.30
Hang Seng	24,994.14	168.48	0.68	3.19	27.37
Shanghai Com	3,559.79	25.31	0.72	2.95	9.11

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,090.70	56,952.75
Support	24,900 & 24,730	56,500 & 55,250
Resistance	25,260 & 25,170	57,380 & 57,190

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,823.67	12,504.90	-1,681.23
DII Cash Market	13,793.86	10,215.43	3,578.43

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	271.70	5.64	67508.53
ICICI Bank	1465.80	2.81	13867.14
HDFC Bank	2000.50	2.20	11154.54
HDFC Life	752.30	1.73	2073.70
M&M	3246.70	1.70	2436.54
Top Losers			
Reliance	1428.60	-3.21	22442.74
Wipro	260.35	-2.47	12190.00
IndusInd Bank	858.80	-1.29	6765.86
Eicher Motors	5558.00	-1.24	190.72
HCL Tech	1530.40	-1.19	3368.84

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.15	-0.19	-8.93
WTI (USD/bbl)	67.27	-0.10	-8.01
Gold Spot (USD/t oz.)	3,394.05	1.32	27.70
USD/INR	86.30	-0.16	0.76
10 Year G-Sec India	6.300	-0.10	-7.10
US 10 Year Bond	4.374	-0.09	-4.27

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's main indices gained on Monday, buoyed by solid earnings from heavyweights HDFC Bank and ICICI Bank, although Reliance Industries fell over concerns about slowdown in its oil-to-chemicals and retail segments, limiting some gains. As of 6:58 a.m., the GIFT Nifty was trading 0.01% higher, or 2.50 points, at 25,184.50, implying that the Nifty 50 index will open higher.

Global

The S&P 500 and the Nasdaq notched record high closes on Monday lifted by Alphabet and other mega caps ahead of several earnings reports this week, while investors bet on potential trade deals to blunt economic damage from the Trump administration's global tariffs.

The Tokyo Stock Exchange is closed for Marine Day. Hong Kong stocks kicked off the week's trading on a strong note on Monday, with the benchmark extending the gain from a three-year high as optimism about the resilience of China's growth and the risk-on mood in global equities buoyed sentiment.

Commodities & Currency :

The Indian rupee fell modestly, pushed by dollar bids from international and domestic private banks, but broad-based weakening in the dollar helped the local currency minimize further losses.

Gold prices rose more than 1% to a five-week high, as the dollar and US bond yields fell amid uncertainty ahead of a US deadline of August 1 for countries to reach trade agreements with Washington or face further tariffs.

News:

India's market regulator said that trading restrictions on Jane Street had been eased following the deposit of \$567 million by a US high-frequency trading business.

State Bank of India, the country's largest lender by assets, announced that it had raised 250 billion rupees (\$2.90 billion) by selling shares to institutional investors.

India's infrastructure output surged to a three-month high of 1.7% year on year in June, according to government data released.

PNB Housing Finance posts a 23% rise in first-quarter profit on Monday, helped by steady home loan demand.

Reliance Industries' swift success in operationalizing gigafactories for its new energy sector has boosted analysts' confidence in the Indian conglomerate's newest business area, which many regard as the company's next key growth driver.

UltraTech Cement, India's largest cement maker by capacity, posted first-quarter earnings above market expectations, boosted by higher prices of the construction material.

Larsen & Toubro's share price increased by 1.05% following the announcement that its subsidiary, L&T Energy GreenTech (LTEG), will establish India's first green hydrogen plant at Indian Oil Corporation Ltd's (IOCL) Panipat Refinery in Haryana.

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