

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,112.40	319.15	1.29	1.60	5.77
BSE Sensex	82,408.17	1046.3	1.29	1.27	4.97
Bank Nifty	56,252.85	675.4	1.22	0.63	10.17
Nifty Midcap 100	57,995.50	835.55	1.46	0.38	0.95
Nifty Smallcap 100	18,194.20	181.1	1.01	0.55	-4.04
S&P 500	5,967.84	-13.03	-0.22	0.54	1.69
DJIA	42,206.82	35.16	0.08	-0.23	-0.44
Nasdaq 100	21,626.39	-93.3	-0.43	0.63	3.10
Nikkei 225	38,403.23	-85.11	-0.22	2.49	-2.30
Hang Seng	23,530.48	292.74	1.26	1.61	19.91
Shanghai Com	3,362.11	-26.701	-0.79	0.00	3.05

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,112.40	56,252.85
Support	24,840 & 24,650	55,470 & 55,130
Resistance	25,245 & 25,375	56,690 & 56,970

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	52,411.51	44,470.81	7,940.70
DII Cash Market	24,208.65	27,258.53	-3,049.88

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Jio Financial	294.25	3.57	21,062.47
Bharti Airtel	1,936.70	3.18	16,228.53
Trent	5,897.50	3.04	10,424.19
M&M	3,184.40	2.90	8,315.83
Bharat Elec	408.25	2.43	1,22,552.44
Top Losers			
Bajaj Auto	8,371.00	-1.47	567.65
Hero Motocorp	4,338.50	-1.04	1,159.02
Maruti Suzuki	12,791.00	-0.12	652.13
Dr Reddys Labs	1,325.30	-0.06	1,843.90

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	77.01	-2.33	1.42
WTI (USD/bbl)	74.93	0.46	2.46
Gold Spot (USD/t oz.)	3,368.39	-0.07	26.73
USD/INR	86.59	0.17	1.10
10 Year G-Sec India	6.311	0.02	-6.97
US 10 Year Bond	4.375	-0.36	-4.24

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity indexes climbed on Friday, boosted by financial sector advances after the central bank relaxed project financing rules. The GIFT Nifty was trading below 25,000 early on Monday, indicating a muted start for the markets.

Global

US markets closed neutral on Friday, as investors navigated a rush of developments on numerous fronts. A Fed governor mentioned the potential of interest rate decreases by July, and President Trump postponed a decision on whether to sanction a US strike in Iran.

Japan's Nikkei stock index lost early gains and finished lower, as global worries surrounding the Middle East war weighed on mood.

Hang Seng Index closed 1.26% higher at 23,530, while mainland China's CSI 300 index closed flat at 3,846.64, after the People's Bank of China maintained its loan rates at 3.0% for the 1-year loan prime rate and 3.5% for the 5-year LPR.

Commodity & Currency :

The Indian rupee closed moderately higher, but declined for the second week in a row as the dispute between Iran and Israel remained the primary driver for global markets, keeping energy prices high and putting pressure on Asia's oil-sensitive currencies.

Gold prices remained stable and on track for a weekly loss as US President Donald Trump postponed a decision on entering the Israel-Iran war.

News:

India would take steps to protect local fuel supply, said oil minister Hardeep Singh Puri on Sunday, following US attacks on Iran's nuclear sites, which elevated the danger of Middle Eastern oil and gas disruptions and rising energy prices.

A significant rate drop would reassure stakeholders of India's focus on economic growth and aid in speedier transmission while encouraging investment and consumption, members of the monetary policy committee noted in the June policy minutes published.

Hindustan Aeronautics Ltd, a state-run company, has won a contract to commercially manufacture India's small satellite launch rockets, the government's most significant move yet to open up the country's fast-growing space industry to private firms.

India's infrastructure output climbed 0.7% year on year in May, according to government figures.

Suzlon Energy climbed 1.26% after receiving its third consecutive order from Ampin Energy Transition (AMPIN) to create a 170.1 MW wind power project in Kurnool, Andhra Pradesh.

Shares of Power Finance Corporation (PFC) (+4.92%) and REC (+2.96%) rose after the Reserve Bank of India (RBI) released its final Project Finance Directions, 2025. Lenders will now set aside a standard 1% for such exposures, with a progressive rise based on the duration of the DCCO postponement.

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