

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,971.90	-140.5	-0.56	1.03	5.18
BSE Sensex	81,896.79	-511.38	-0.62	0.64	4.32
Bank Nifty	56,059.35	-193.5	-0.34	0.28	9.79
Nifty Midcap 100	58,206.80	211.3	0.36	0.75	1.32
Nifty Smallcap 100	18,320.90	126.7	0.70	1.25	-3.37
S&P 500	6,025.17	57.33	0.96	1.50	2.67
DJIA	42,581.78	374.96	0.89	0.65	0.45
Nasdaq 100	21,856.33	229.94	1.06	1.70	4.20
Nikkei 225	38,354.09	-49.14	-0.13	2.36	-2.42
Hang Seng	23,689.13	158.65	0.67	2.29	20.72
Shanghai Com	3,381.58	21.686	0.65	0.58	3.65

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,971.90	56,059.35
Support	24,730 & 24,500	55,750 & 55,450
Resistance	25,140 & 25,250	56,350 & 56,700

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,499.27	7,907.50	5,591.77
DII Cash Market	8,570.02	10,444.40	-1,874.38

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Trent	6,120.00	3.77	2,271.64
Bharat Elec	420.90	3.10	43,017.72
Hindalco	661.40	1.89	6,080.55
Bajaj Finance	915.50	1.16	5,870.60
Adani Enterprise	2,472.00	0.96	790.54
Top Losers			
Infosys	1,584.00	-2.40	7,943.68
Larsen	3,583.70	-2.14	1,867.98
HCL Tech	1,703.20	-2.11	2,221.45
Hero Motocorp	4,253.10	-1.97	580.72
M&M	3,135.00	-1.55	1,731.43

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.82	-2.32	1.06
WTI (USD/bbl)	66.82	-2.47	1.06
Gold Spot (USD/t oz.)	3,376.40	0.24	27.03
USD/INR	86.75	-0.19	1.29
10 Year G-Sec India	6.305	-0.06	-7.02
US 10 Year Bond	4.350	-0.05	1.06

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indexes inched lower, matching Asian rivals, as investors assessed the likelihood of Iran's reaction to the US bombing of its nuclear sites. As of 6:50 a.m., the GIFT Nifty was up 0.43% or 107 points to 25,157, implying a stronger open for the NSE Nifty 50.

Global

Wall Street surged as Iran did not seal the Strait of Hormuz, a vital oil shipping route. The potential of the US Federal Reserve reducing interest rates as early as July added to the positive mood. Alex Cohen has more.

Japan's Nikkei stock average declined after US attacks on Iranian nuclear installations fuelled risk aversion, while rising oil costs weighed on the prospects for Japan's economy and business earnings.

Hong Kong stocks fluctuated as volatility rose following the US strike on Iran's nuclear facilities, fuelling haven trade and raising concerns about a disruption in global oil supply.

Commodity & Currency :

The Indian rupee fell on Monday, along with other Asian currencies, as investors sought refuge in safe havens such as the US dollar amid rising Middle Eastern tensions, while a drop in crude oil prices served to cushion their losses.

Gold prices increased as growing tensions between Iran and Israel boosted demand for safe haven assets, with markets keenly tracking regional developments.

News:

According to a poll released on Monday, India's private sector activity increased dramatically in June as companies increased production to meet increasing home and international demand. The report also revealed record export growth and solid employment.

PhonePe, an Indian fintech business backed by Walmart, is planning to file preliminary filings for an IPO that could raise up to \$1.5 billion, Bloomberg News reported on Monday, citing individuals familiar with the situation.

Waaree Renewable Technologies gained 0.29%. The company said that it has signed a non-binding memorandum of understanding (MoU) with Viet Khanh Joint Stock Company to carry out engineering, procurement, and construction (EPC) work on a solar power project.

Bharat Electronics (BEL) gained 3.15% after announcing that it had acquired additional orders for Rs 585 crore since its last statement on June 5, 2025.

Nitco rose 2.04% after the business said that it had secured a new letter of intent (LoI) from Prestige Estates Projects for an additional tile supply contract valued over Rs 45 crore.

A wholly-owned subsidiary of Cochin Shipyard Ltd. has secured a "notable" order worth between Rs 100 crore and Rs 250 crore for the construction of two luxury river cruise vessels to be operated on the Brahmaputra.

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