

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	26,068.15	-124.00	-0.47	1.18	9.79
BSE Sensex	85,231.92	-400.76	-0.47	1.49	8.57
Bank Nifty	58,867.70	-480.00	-0.81	1.32	15.29
Nifty Midcap 100	60,276.30	-687.25	-1.13	-0.02	4.92
Nifty Smallcap 100	17,847.50	-219.75	-1.22	-3.60	-5.87
S&P 500	6,602.99	66.23	0.98	-3.59	11.42
DJIA	46,245.41	493.15	1.08	-2.27	7.93
Nasdaq 100	24,239.57	185.19	0.77	-6.63	14.68
Nikkei 225	48,625.88	-1198.06	-2.40	-5.58	23.71
Hang Seng	25,220.02	-615.55	-2.38	-3.59	28.52
Shanghai Com	3,834.89	-96.16	-2.45	-3.56	17.54

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,068.15	58,867.70
Support	26,000 & 25,900	58,680 & 58,500
Resistance	26,190 & 26,270	59,120 & 59,400

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,585.86	16,351.91	-1,766.05
DII Cash Market	14,908.67	11,747.06	3,161.61

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Maruti Suzuki	15977.00	1.11	586.35
Max Healthcare	1181.10	1.04	2258.53
Interglobe Avi	5843.50	1.00	410.05
M&M	3749.60	0.89	3184.15
TATA Cons. Prod	1183.10	0.78	3194.55
Top Losers			
Hindalco	777.70	-2.76	5099.36
Tata Steel	168.00	-2.59	28412.87
JSW Steel	1140.30	-2.54	1045.63
Bajaj Finance	1004.10	-2.38	6304.58
HCL Tech	1608.00	-2.27	2958.84

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.91	-0.73	-17.12
WTI (USD/bbl)	58.42	-0.97	-20.10
Gold Spot (USD/t oz.)	4,062.37	-0.37	52.84
USD/INR	89.41	-0.78	4.39
10 Year G-Sec India	6.517	0.45	-3.89
US 10 Year Bond	4.063	-1.00	-9.22

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices closed modestly lower on Friday due to profit booking after US employment data dashed chances of an immediate rate decrease.

Global

Wall Street stocks closed sharply higher on Friday as rising expectations of a December interest rate cut by the Federal Reserve offset concerns over lofty tech valuations.

Japan's Nikkei share average ended sharply lower on Friday, dragged down by technology-related stocks, as fresh valuation concerns drove US stocks lower overnight.

Hong Kong stocks fell following Wall Street's retreat as renewed concerns about the artificial intelligence sector and lacklustre US jobs data prompted investors to pull back from riskier assets after a brief Nvidia-led rally.

Commodities & Currency :

The Indian rupee fell to a lifetime low on Friday, owing to a round of portfolio outflows, concern over a US-India trade deal, and a reversal in the central bank's defense of a crucial level.

Gold prices held steady on Friday, after falling over 1% earlier in the session, as traders boosted bets on a December US interest rate cut following dovish US Federal Reserve comments.

News:

India announced on Friday the implementation of four new codes that seek to simplify and streamline the existing, decades-old labour laws in the country, in a fresh attempt at reform to help liberalise conditions for investment.

The central banks of India and the European Union have agreed to start the initial phase of linking domestic payments systems, the Reserve Bank of India said.

India's private sector activity expanded at its slowest pace in six months in November as manufacturing growth slipped to a nine-month low, offsetting an uptick in services, according to a private survey.

India markets regulator is considering widening liquid mutual fund options for Real Estate Investment Trusts and Infrastructure Investment Trusts to boost their participation, its chairperson said in a speech.

Billionbrains Garage Ventures the parent of Indian online stockbroker Groww, reported a 12% rise in second-quarter profit boosted by a jump in active users.

India's Kotak Mahindra Bank said on Friday it will split one share into five, in its first stock split since September 2010.

India's Axis Bank said it plans to raise up to 50 billion rupees (\$559 million) via debt securities on a private placement basis.

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