



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	26,177.15	4.75	0.02	0.01	10.25
BSE Sensex	85,524.84	-42.64	-0.05	-0.14	8.94
Bank Nifty	59,299.55	-4.45	-0.01	-0.64	16.14
Nifty Midcap 100	60,816.10	0.85	0.00	-0.37	5.86
Nifty Smallcap 100	17,658.80	65.75	0.37	-1.21	-6.86
S&P 500	6,909.79	31.3	0.46	1.43	17.74
DJIA	48,442.41	79.73	0.16	2.44	14.27
Nasdaq 100	25,587.83	126.13	0.50	0.97	21.99
Nikkei 225	50,412.87	10.48	0.02	2.25	28.25
Hang Seng	25,774.14	-27.63	-0.11	-1.00	31.34
Shanghai Com	3,919.98	2.62	0.07	0.15	20.15

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	26,177.15	59,299.55
Support	26,030 & 25,880	59,100 & 58,850
Resistance	26,260 & 26,350	59,550 & 59,760

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	7,035.26	8,830.06	-1,794.80
DII Cash Market	11,906.43	8,094.06	3,812.37

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Coal India	400.40	3.66	18487.40
Shriram Finance	957.80	2.45	14632.46
UltraTechCement	11678.00	1.27	161.83
ITC	407.35	1.15	10082.00
TMPV	363.25	1.14	11885.58
Top Losers			
Infosys	1668.30	-1.26	6593.06
Bharti Airtel	2122.90	-1.15	4110.85
Adani Ports	1493.60	-1.00	928.45
Tech Mahindra	1633.00	-0.83	1161.17
Eternal	284.35	-0.82	12762.62

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.38	0.50	-17.87
WTI (USD/bbl)	58.36	0.60	-20.20
Gold Spot (USD/t oz.)	4,484.33	0.92	68.72
USD/INR	89.66	-0.01	4.69
10 Year G-Sec India	6.633	-0.53	-2.19
US 10 Year Bond	4.155	-0.19	-9.06

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmark shares closed flat on Tuesday 23rd December, pulled down by losses in information technology sectors and low year-end trading volumes as investors turned to the forthcoming third-quarter earnings season for a confidence boost.

Global

US stocks rose on Tuesday and the S&P 500 notched a closing record after a flurry of economic data that included a reading of economic growth pushed bond yields higher and elevated growth names.

Japanese stocks rose on Tuesday as a retreat in domestic bond yields from record highs lifted sentiment, although persistent worries about artificial intelligence-linked share valuations capped gains for the tech-heavy Nikkei.

Hong Kong stocks ended lower reversing early gains, as investors booked profits, offsetting optimism that the rally could extend into next year.

Commodities & Currency :

The rupee closed flat on Tuesday, pulled down by continued dollar demand from domestic corporations and the non-deliverable futures market, which offset positive signs from increases in most regional currencies.

Both gold and silver touched fresh historic highs in Tuesday's session, as renewed geopolitical tensions boosted appetite for precious metals, while expectations of further US Federal Reserve rate cuts next year, following signs of easing inflation and a cooling labor market, also supported the record-breaking rally.

News:

The Reserve Bank of India will infuse about \$32 billion worth of rupee liquidity into the banking system over the next month via open market bond purchases and a buy/sell dollar-rupee swap, it said on Tuesday. India's rice inventories in government warehouses climbed nearly 12% from a year earlier to a record high for early December after state-run agencies stepped up procurement of the new-season paddy crop, government data showed.

Indian investors are set for another supply overhang as state governments and central government owned entities have lined up heavy debt sales on a single day.

China has launched a trade dispute with India over solar cells, solar modules and IT goods, requesting dispute consultations on the matter, the World Trade Organization said on Tuesday.

Bank of India has raised Rs 10,000 crore via the issuance of long-term bonds, according to an exchange filing on Tuesday. This comprises a base issue of Rs 5,000 crore, and a green shoe option of Rs 5,000 crore on a private placement basis.

The International Cricket Council announced on Tuesday a major multi-year global partnership with Hyundai Motor Co., which sees the automotive manufacturer come on board as one of only four premier partners for upcoming ICC events.

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