

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,044.35	72.45	0.29	1.33	5.48
BSE Sensex	82,055.11	158.32	0.19	0.84	4.52
Bank Nifty	56,461.90	402.55	0.72	1.00	10.58
Nifty Midcap 100	58,622.40	415.6	0.71	1.47	2.04
Nifty Smallcap 100	18,452.75	131.85	0.72	1.97	-2.67
S&P 500	6,092.18	67.01	1.11	2.63	3.81
DJIA	43,089.02	507.24	1.19	1.85	1.64
Nasdaq 100	22,190.52	334.19	1.53	3.25	5.79
Nikkei 225	38,790.56	436.47	1.14	3.52	-1.31
Hang Seng	24,177.07	487.94	2.06	4.40	23.21
Shanghai Com	3,420.57	38.984	1.15	1.74	4.84

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,044.35	56,461.90
Support	24,850 & 24,740	55,990 & 55,550
Resistance	25,240 & 25,350	56,880 & 57,080

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,628.08	18,894.09	-5,266.01
DII Cash Market	14,931.45	9,721.85	5,209.60

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Jio Financial	300.80	2.61	2,816.40
Adani Ports	1389.50	2.56	923.40
Shriram Finance	676.05	2.18	4,823.57
Grasim	2780.90	2.10	7,635.18
Kotak Mahindra	2223.60	1.81	5,604.52
<b>Top Losers</b>			
ONGC	243.92	-2.97	22,215.00
Power Grid Corp	285.95	-1.48	15,007.85
Trent	6057.50	-1.02	1,459.59
IndusInd Bank	831.95	-0.95	5,482.59
NTPC	329.95	-0.80	1,00,814.89

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.96	1.37	10.36
WTI (USD/bbl)	65.32	1.48	10.68
Gold Spot (USD/t oz.)	3,305.72	-1.86	24.37
USD/INR	85.98	0.90	0.39
10 Year G-Sec India	6.250	-0.87	-7.83
US 10 Year Bond	4.350	0.05	-4.80

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's equities benchmark indexes lost some of their gains after Israel reported it had ordered its military to strike Tehran for violating a ceasefire announced earlier by US President Donald Trump. The GIFT Nifty was trading 0.01% or 2 points higher at 25,155.50 as of 6:44 a.m., implying that the benchmark Nifty 50 may begin higher than Tuesday's close.

#### Global

US stocks rose more than 1% as investors cheered a tenuous peace with Israel and Iran while scrutinizing Federal Reserve Chair Jerome Powell's congressional speech for hints about the central bank's future direction.

Japan's equities closed higher, driven by advances in the real estate, banking, and textile sectors.

China and Hong Kong markets climbed, leading a broader Asian surge, as global risk appetite strengthened following US President Donald Trump's pledge of an Israeli-Iranian ceasefire.

### Commodities & Currency :

The Indian rupee enjoyed its best day in a month, as oil prices fell, the dollar sank, and Asian currencies surged following the implementation of a truce between Israel and Iran, restoring risk appetite.

Gold sank to a more than two-week low as Iran and Israel announced a cease-fire, reducing safe-haven demand for bullion.

### News:

According to a consultation paper, India's markets regulator advocated increasing board oversight of core exchange tasks such as trading, risk management, regulatory, and compliance operations.

Tata Motors, the owner of premium carmaker Jaguar Land Rover, said on Tuesday that China's rare-earth export limitations had not forced it to press any "panic buttons" yet, and that its electric vehicle launches were on schedule.

India's thermal power plant coal storage has hit a record high of 58.25 million tonnes, enough to meet 25 days of usage, the government announced on Tuesday, improving energy security ahead of the monsoon season.

Following a review of the banking system's liquidity situation, India's central bank announced a seven-day variable rate reverse repo auction for one trillion rupees (\$11.62 billion) on June 27.

KPIT Technologies fell 6.12% after the company issued its mid-quarter update for June 2025, which revealed a mixed picture of near-term business performance and execution challenges.

Enviro Infra Engineers' stock jumped 12% after the business stated that it has secured two important solar power projects totalling 69 MW (AC) capacities, signifying its strategic entry into the renewables industry.

Hindalco Industries Ltd. stated that it intends to buy US-based AluChem Companies Inc. in an all-cash transaction valued at \$125 million, or Rs 1,075 crore.

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