

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,062.10	-157.8	-0.63	-1.88	5.56
BSE Sensex	82,184.17	-542.47	-0.66	-1.81	4.68
Bank Nifty	57,066.05	-144.4	-0.25	-0.68	11.76
Nifty Midcap 100	58,960.70	-346.40	-0.58	-1.32	2.63
Nifty Smallcap 100	18,686.80	-206.4	-1.09	-1.94	-1.44
S&P 500	6,363.35	4.44	0.07	2.67	8.43
DJIA	44,693.91	-316.38	-0.70	0.45	5.43
Nasdaq 100	23,219.87	57.46	0.25	3.30	10.70
Nikkei 225	41,826.34	655.02	1.59	4.60	6.41
Hang Seng	25,667.18	129.11	0.51	5.97	30.80
Shanghai Com	3,605.73	23.43	0.65	4.28	10.52

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,062.10	57,066.05
Support	24,970 & 24,830	56,800 & 56,570
Resistance	25,200 & 25,330	57,370 & 57,560

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,725.46	15,859.15	-2,133.69
DII Cash Market	13,507.17	10,890.03	2,617.14

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	313.15	3.67	120603.75
Tata Motors	700.50	1.51	15197.66
Dr Reddys Labs	1265.50	1.45	3809.21
Grasim	2735.90	0.99	997.65
Cipla	1487.90	0.98	1389.15
Top Losers			
Nestle	2322.10	-5.32	2686.01
Trent	5154.00	-3.83	1326.26
Shriram Finance	633.55	-3.13	7248.08
Tech Mahindra	1498.60	-3.10	2207.44
Reliance	1402.90	-1.52	14740.51

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.79	0.41	-9.40
WTI (USD/bbl)	65.63	0.58	-10.26
Gold Spot (USD/t oz.)	3,369.43	-0.53	26.77
USD/INR	86.41	0.01	0.89
10 Year G-Sec India	6.328	0.25	-6.69
US 10 Year Bond	4.392	-0.09	-3.88

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dipped, pulled down by post-earnings losses in information technology and consumer stocks, as well as financial services businesses' decline following a three-day rise. As of 6:46 a.m., the GIFT Nifty was trading 0.04% higher, or 9.50 points, at 24,977.50, implying that the benchmark Nifty 50 index will open higher.

Global

The S&P 500 and the Nasdaq closed at record highs on Thursday, as strong results from Google parent Alphabet spurred excitement about other major artificial intelligence firms.

Japan's Topix stock index rose above last summer's record to close at a fresh peak as hopes of more US tariff deals brightened the outlook for global trade and economic growth.

Hong Kong stocks continued their stellar run on Thursday, with the benchmark hitting a three-year high for the fourth time this week as investors bet against a global trade war thanks to progress towards a tariff deal between the US and the European Union (EU).

Commodities & Currency :

The Indian rupee traded higher, bringing some relief following a string of losses, while pressure remained due to persistent dollar demand caused by foreign outflows.

Gold prices fell for a second straight session on Thursday, as signs of easing global trade tensions dampened demand for safe-haven assets.

News:

Britain and India signed a free trade agreement on Thursday during a visit by Indian Prime Minister Narendra Modi, sealing a deal to cut tariffs on goods from textiles to whisky and cars and allow more market access for businesses.

India's financial crime-fighting agency searched 35 locations linked to Reliance Anil Ambani Group as part of an investigation into alleged money laundering and siphoning of public funds, a government source said.

India is making "fantastic" progress in trade talks with the United States, Commerce Minister Piyush Goyal told Reuters, adding he was very confident that India would get special treatment from President Donald Trump.

The Indian government has appointed former Finance Secretary Ajay Seth as the chairman of Insurance Regulatory and Development Authority of India (IRDAI) for three years, according to a government order.

Growth in India's private sector remained robust in July, supported by strong manufacturing and international demand, but rising inflation and weaker employment generation tempered the expansion, a business survey showed.

Nestle India posted a 12% decline in first-quarter profit on Thursday, as higher raw material costs and expenses tied to its manufacturing expansion weighed on margins, sending shares down more than 5%.

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