

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,549.00	304.25	1.21	3.37	7.61
BSE Sensex	83,755.87	1000.36	1.21	2.93	6.69
Bank Nifty	57,206.70	585.55	1.03	2.33	12.04
Nifty Midcap 100	59,227.40	345.70	0.59	2.51	3.09
Nifty Smallcap 100	18,805.60	77.75	0.42	3.92	-0.81
S&P 500	6,141.02	48.86	0.80	3.45	4.64
DJIA	43,386.84	404.41	0.94	2.56	2.35
Nasdaq 100	22,447.29	209.55	0.94	4.45	7.02
Nikkei 225	39,584.58	642.51	1.65	5.64	0.71
Hang Seng	24,325.40	-149.27	-0.61	5.04	23.96
Shanghai Com	3,455.97	35.41	1.04	2.80	5.93

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,549.00	57,206.70
Support	25,300 & 25,100	56,570 & 56,100
Resistance	25,800 & 26,010	57,430 & 57,750

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	32,020.06	19,425.68	12,594.38
DII Cash Market	14,029.71	14,224.94	-195.23

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	703.20	4.16	19,068.57
Jio Financial	312.5	3.03	37,158.99
Hindalco	690.60	2.67	8,196.12
Tata Steel	160.54	2.65	40,650.56
Adani Ports	1,429.30	2.60	2,877.81
Top Losers			
Dr Reddys Labs	1,321.50	-1.50	2,373.43
Tech Mahindra	1,690.20	-0.87	2,528.27
Hero Motocorp	4,278.00	-0.53	795.73
Maruti Suzuki	12,715.00	-0.41	354.74
SBI	797.05	-0.37	24,704.40

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.07	0.61	-10.35
WTI (USD/bbl)	65.58	0.64	-10.21
Gold Spot (USD/t oz.)	3,334.54	0.07	25.46
USD/INR	85.71	0.44	0.07
10 Year G-Sec India	6.276	-0.18	-7.45
US 10 Year Bond	4.259	0.37	-6.39

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities surged for the third day in a row on Thursday, led by advances in Reliance Industries and sectors such as financials and metals, as lessening Israel-Iran tensions boosted risk appetite. As of 6:50 a.m., the GIFT Nifty was up 0.08%, or 20.50 points, at 25,718.00, indicating a strong start for the NSE Nifty 50.

Global

The S&P 500 flirted with ending at an all-time high, aiming to cap a whirlwind roundtrip that saw the benchmark US stock index lose and then reclaim almost \$9.8 trillion in market value in only four months.

The Japanese stock market has risen in consecutive sessions, gaining about 600 points, or 1.5%. The Nikkei 225 is presently close above the 38,940-point mark, yet the rise may halt.

Hong Kong stocks fell from a three-month high as property developers and lenders plummeted after the monetary authority intervened in the currency market and cleaned up liquidity, threatening to raise local interest rates.

Commodities & Currency :

The Indian rupee strengthened to a fortnightly peak, bolstered by broad weakness in the dollar on the back of concerns over the future independence of the US Federal Reserve.

Gold rose as the US dollar fell over fears about the Federal Reserve's future independence, as market attention switched to impending US inflation data for clues on the interest rate outlook.

News:

The Indian government has rejected a claim by trade associations that its effort to impose quality control limitations on copper cathode imports will lead to a monopoly, as ten international suppliers have acquired certification, according to a court document.

Vedanta, an Indian miner, said that its parent company, Vedanta Resources, has acquired a loan facility arrangement with international banks to refinance its debt of up to \$600 million.

The Reserve Bank of India's (RBI) holdings of Indian government securities reached a new high in absolute terms following strong debt buying, but analysts predict a decrease as the year proceeds.

HDB Financial Services' \$1.5 billion initial public offering was completely subscribed on the second day of bidding, as investors flocked to India's largest offering this year amid signs of a capital market rebound.

Cummins India's stock climbed 1.44% after the firm announced the introduction of its Battery Energy Storage Systems (BESS). Designed largely for the domestic market, these advanced battery storage solutions will serve critical sectors such as manufacturing, data centers, commercial real estate, and mining, all of which rely increasingly on stable, renewable energy sources.

Tata Power Co. has applied to distribute energy to several parts of Maharashtra as part of its efforts to expand beyond the financial capital, according to officials.

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