

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,680.90	-156.10	-0.63	-3.37	3.95
BSE Sensex	80,891.02	-572.07	-0.70	-3.35	3.04
Bank Nifty	56,084.90	-444.00	-0.79	-2.39	9.84
Nifty Midcap 100	57,519.35	-490.10	-0.84	-3.73	0.12
Nifty Smallcap 100	18,064.75	-229.70	-1.26	-5.20	-4.72
S&P 500	6,389.77	1.13	0.02	3.09	8.88
DJIA	44,837.56	-64.36	-0.14	0.77	5.77
Nasdaq 100	23,356.27	84.02	0.36	3.91	11.35
Nikkei 225	40,998.27	-457.96	-1.10	2.53	4.30
Hang Seng	25,562.13	173.78	0.68	5.54	30.26
Shanghai Com	3,597.94	4.28	0.12	4.05	10.28

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,680.90	56,084.90
Support	24,590 & 24,480	55,830 & 55,550
Resistance	24,800 & 24,900	56,250 & 56,570

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,993.78	16,076.25	-6,082.47
DII Cash Market	15,799.53	9,034.98	6,764.55

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	633.45	2.86	11583.11
Cipla	1572.00	2.58	3843.17
Hero Motocorp	4291.10	1.43	462.89
HUL	2441.60	1.08	988.00
Asian Paints	1850.50	1.00	1182.40
Top Losers			
Kotak Mahindra	1966.60	-7.44	13824.70
Bajaj Finance	880.50	-3.64	14011.28
Wipro	250.05	-3.53	8998.91
IndusInd Bank	802.05	-2.63	5922.41
Bharti Airtel	1890.30	-2.46	3575.04

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.91	2.15	-8.01
WTI (USD/bbl)	66.60	2.21	-8.93
Gold Spot (USD/t oz.)	3,311.10	-0.79	24.58
USD/INR	86.66	-0.16	1.18
10 Year G-Sec India	6.370	0.30	-6.06
US 10 Year Bond	4.402	-0.18	-3.66

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dipped on Monday as financials and IT sank owing to poor earnings from Kotak Mahindra Bank and Tata Consultancy Services' layoff plans, respectively, and as concern about trade talks with the US weighed on overall confidence.

Global

US stocks eked out records Monday in relatively muted trading session as the US and European Union struck a trade pact. The market action kicked off a packed week of Big Tech earnings, a Federal Reserve meeting, inflation data, the July jobs report, and President Trump's Aug. 1 deadline to lock in key trade deals.

The US struck a framework trade agreement with the European Union, imposing a 15% import tariff on most EU goods - half the threatened rate - and averting a bigger trade war between the two allies that account for almost a third of global trade.

Japan's Nikkei share reversed course to end lower, as investors locked in profits following a recent rally and shifted their focus to domestic corporate earnings.

China's Shanghai Composite index edged up by 0.12% to 3,597.94 ahead of US-China talks in Stockholm to resolve trade tensions and extend the truce before it expires on August 12.

Commodities & Currency :

The Indian rupee dipped as month-end dollar bids from importers exerted some pressure, but the currency largely sidestepped the spillover from a firmer dollar, which traders indicated was due to the absence of substantial outflows.

Gold fell to a near three-week low as a US-European Union trade accord lifted the dollar and risk sentiment, while investors awaited fresh cues on rate policy from this week's Federal Reserve meeting.

News:

India's industrial output grew 1.5% year-on-year in June, government data showed. Output of consumer durables, including cars and phones, grew 2.9% in June as compared to a revised drop of 0.9% a month ago.

Indian paper and packaging board maker JK Paper reported an eighth straight quarter of a decline in profit on Monday and said it would acquire a 72% stake in private peer Borkar Packaging for 2.35 billion rupees.

GAIL (India) posted a bigger-than-expected fall in quarterly profit, as higher raw material costs weighed on stable demand.

IndusInd Bank stated that its "financials have returned to profitability" after posting its largest-ever loss in the previous three months.

Adani Green Energy reported a 31% jump in first-quarter profit, driven by an increase in power sales and higher capacity utilisation.

A global slowdown could further dampen demand for Indian exports and continued uncertainty on US tariffs may weigh on the country's trade performance in coming quarters, India's finance ministry said in its monthly economic report.

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