



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,637.80	88.8	0.35	3.73	7.98
BSE Sensex	84,058.90	303.03	0.36	3.30	7.07
Bank Nifty	57,443.90	237.2	0.41	2.76	12.50
Nifty Midcap 100	59,385.15	157.75	0.27	2.79	3.37
Nifty Smallcap 100	18,976.80	171.2	0.91	4.87	0.09
S&P 500	6,173.07	32.05	0.52	3.99	5.19
DJIA	43,819.27	432.43	1.00	3.58	3.37
Nasdaq 100	22,534.20	86.91	0.39	4.85	7.43
Nikkei 225	40,150.79	566.21	1.43	7.15	2.15
Hang Seng	24,284.15	-41.25	-0.17	4.86	23.75
Shanghai Com	3,424.23	-24.226	-0.70	1.85	4.96

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,637.80	57,443.90
Support	25,422 & 25,300	57,210 & 56,050
Resistance	25,800 & 26,010	57,572 & 57,770

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	19,740.81	18,343.79	1,397.02
DII Cash Market	41,201.99	41,790.92	-588.93

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Jio Financial	323.45	3.50	60,666.21
Asian Paints	2358.70	3.01	1,555.26
Apollo Hospital	7308.50	2.91	523.58
IndusInd Bank	857.70	2.58	12,647.86
Adani Enterprise	2646.30	2.32	4,049.32
Top Losers			
TATA Cons. Prod	1124.30	-1.84	622.38
Dr Reddys Labs	1301.00	-1.55	1,770.60
Trent	6019.50	-1.43	1,935.33
Wipro	265.05	-1.29	8,906.11
Eternal	261.86	-1.25	61,545.46

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.77	0.06	-10.75
WTI (USD/bbl)	65.52	0.43	-10.41
Gold Spot (USD/t oz.)	3,274.33	-1.61	23.19
USD/INR	85.49	0.26	-0.19
10 Year G-Sec India	6.314	0.61	-6.89
US 10 Year Bond	4.269	0.83	-0.39

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

The Nifty 50 and Sensex finished higher for the fourth day in a row, while Nifty Bank closed at a record high, boosted by a mix of global and domestic tailwinds. The recent Israel-Iran agreement alleviated geopolitical concerns, while confidence about global trade boosted risk-on attitude. The GIFT Nifty was up 0.11% or 29.50 points at 25,765, indicating a bullish start for the benchmark NSE Nifty 50 index.

Global

The S&P 500 set new highs as traders ignored new statements from President Donald Trump on tariffs between the United States and Canada. The broad market index's ascent to record highs represents a dramatic contrast to the lows experienced in April, during the height of trade policy concerns.

Japan equities rose after the close, with advances in the real estate, banking, and textile sectors propelling shares higher.

China's Shanghai Composite index slid 0.70% to 3,424.23, as new data revealed that China's industrial profits plummeted 9.1 percent year on year in the first five months of the year, owing to rising deflationary pressures and a protracted housing crisis.

Commodities & Currency :

The Indian rupee had its best week since January 2023, as an Iran-Israel ceasefire lowered oil prices and depleted safe-haven dollar demand, while concerns over the Federal Reserve's future independence weighed on the dollar.

Gold plummeted to a near one-month low after a US-China trade pact increased risk appetite and reduced bullion's appeal as a safe-haven asset.

News:

The Indian economy will develop at a relatively stable pace this fiscal year and next after hitting a four-year low in 2024-25, according to economists polled by Reuters, who have mostly maintained their predictions unaltered or made minor upgrades.

Hindustan Oil Exploration Company announced on Friday that it has temporarily halted production at one of its oilfields in western India owing to inclement weather and is monitoring the situation to resume output when conditions improve.

Mazagon Dock Shipbuilders, an Indian state-owned company, announced plans to buy a controlling stake in Sri Lankan rival Colombo Dockyard for up to \$52.96 million in order to expand its shipbuilding and repair business.

India's Torrent Pharmaceuticals announced on Sunday that it will purchase a 46.39% controlling stake in smaller rival JB Chemicals and Pharmaceuticals from New York-based investment firm KKR, with ambitions to integrate the two drug makers.

Akzo Nobel India's stock rose 6.65% to Rs 3405 after the business stated that its existing proprietors had agreed into a share purchase agreement (SPA) with JSW Paints to sell their 74.76% shareholding for a total price of Rs 9,403.21 crore.

Disclaimer:

Ajcon Global Services Limited is a SEBI registered Research Analyst (INH000001170). This report is for informational purposes only and not an offer or solicitation to buy/sell securities. Investments in the securities market are subject to market risks; please read all related documents carefully before investing. The views expressed are based on publicly available information believed to be reliable, but no assurance is given for its accuracy or completeness. Ajcon and its associates may have commercial relationships with companies mentioned. Investors are advised to exercise independent judgment and consult their financial advisor before making investment decisions. For detailed Disclosure and Disclaimer, please click the below link: <http://ajcononline.com/disclosure-and-disclaimer-2/>