



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,547.75	-359.40	-1.50	-2.37	-9.94
BSE Sensex	74,775.74	-1092.06	-1.44	-3.23	-12.22
Bank Nifty	54,239.20	-614.65	-1.12	-1.16	-9.16
Nifty Midcap 100	61,723.80	-835.05	-1.33	2.60	1.60
Nifty Smallcap 100	18,138.80	-155.50	-0.85	0.03	2.45
S&P 500	7,580.06	16.43	0.22	4.84	10.52
DJIA	51,032.46	363.49	0.72	3.10	5.48
Nasdaq 100	30,333.18	109.29	0.36	9.47	20.34
Nikkei 225	66,329.50	1636.38	2.53	11.45	27.97
Hang Seng	25,182.39	176.23	0.70	-3.50	-4.39
Shanghai Com	4,068.57	-30.07	-0.73	-2.20	1.12

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,547.75	54,239.20
Support	23,480 & 23,358	54,105 & 53,853
Resistance	23,876 & 23,998	54,921 & 55,173

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	89,733.64	110,839.50	-21,105.86
DII Cash Market	36,999.70	20,235.56	16,764.14

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Tech Mahindra	1483.90	1.94	3955.14
HCL Tech	1183.80	1.60	12446.60
Wipro	204.25	1.32	82734.52
L&T	4076.50	0.72	4882.94
Infosys	1160.90	0.09	69085.43
<b>Top Losers</b>			
Interglobe Avi	4405.00	-3.61	1359.47
Eicher Motors	7177.00	-3.26	1464.68
Bajaj Auto	10460.00	-3.22	483.16
Power Grid Corp	290.55	-3.20	77407.36
ONGC	265.40	-3.16	74403.40

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	92.05	-1.70	51.52
WTI (USD/bbl)	87.36	-1.73	52.41
Gold Spot (USD/t oz.)	4,540.26	1.00	4.80
USD/INR	95.00	0.73	5.60
10 Year G-Sec India	7.004	0.11	6.41
US 10 Year Bond	4.435	-0.27	0.36

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

India's equity indices sank 1.5% on Friday, extending their monthly losses, as outflows due to MSCI index rebalancing sparked a late decline during the trading day. The 60-day extension of the tentative ceasefire agreement reduced oil prices but did nothing to ease investor morale, as Donald Trump has yet to sign off on it.

#### Global

Wall Street's main indexes hit record closing highs on Friday and posted weekly and monthly gains as Dell results drove tech shares higher, while investors awaited details on a potential US-Iran deal.

Japan's Nikkei share average rose to a record high on Friday, powered by renewed optimism for a near-term peace deal in the Middle East and enthusiasm about AI shares after strong earnings from Dell Technologies.

### Commodities & Currency :

The Indian rupee jumped sharply on Friday to log its best single-day gain in nearly two months as likely intervention by the central bank converged with a drop in oil prices, which also briefly lifted the local currency above the 95/USD mark.

Gold rose more than 1% on Friday after reports that the U.S. and Iran may have agreed to extend their ceasefire, though it was still headed for a monthly decline as inflation concerns and expectations of higher interest rates weighed on prices.

### News:

India's position as the fifth-largest global market by capitalisation is under threat as Taiwan closes in on the South Asian nation's spot, powered largely by the rapid rise of chip-making major Taiwan Semiconductor Manufacturing Co.

India has asked state-run fuel retailers to increase the storage capacity of liquefied petroleum gas to meet 30-days' demand, Sujata Sharma, a joint secretary in the federal oil ministry said on Friday.

India's markets regulator imposed a penalty of 159.5 million rupees (\$1.68 million) on Suzlon Energy on Friday for what it alleged were lapses in the company's financial statements and disclosures.

India forecast an El Nino-weakened monsoon in 2026 that will bring the lowest rainfall in 11 years, fuelling concerns over crops, food prices and growth in the world's fifth-largest economy, battling inflationary pressures from the Iran war.

Hitachi Energy India plans to tap into 30% of the overall spending in the country's data centre industry, from a previous aim of 10-15%, by offering a broad "grid-to-rack" power solution, Managing Director and CEO Venu Nuguri told Reuters.

The Reserve Bank of India will keep its key interest rate unchanged at 5.25% in June, according to most economists in a Reuters poll, although a majority now expect at least one increase by year-end due to risks from high oil prices and pressure on the rupee from weak capital inflows.

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