AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

01st September 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,080.40	-95.25	-0.39	-2.80	-7.90
BSE Sensex	76,957.27	-307.24	-0.40	-2.14	-9.66
Bank Nifty	58,024.95	528.65	0.92	-0.38	-2.82
Nifty Midcap 100	64,224.75	155.25	0.24	0.86	5.72
Nifty Smallcap 100	19,931.65	-148.35	-0.74	1.75	12.58
S&P 500	7,686.14	-25.62	-0.33	1.13	12.44
DJIA	53,191.33	-374.02	-0.70	0.01	10.70
Nasdaq 100	29,456.97	23.55	0.08	2.36	16.77
Nikkei 225	66,311.93	-93.63	-0.14	4.01	27.93
Hang Seng	25,566.99	-17.80	-0.07	-1.70	-2.93
ShanghaiCom	3,952.18	-4.39	-0.11	3.74	-1.77

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,080.40	58,024.95
Support	24,015 & 23,984	57,426 & 57,228
Resistance	24,119 & 24,151	58,066 & 58,263

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	60,025.88	68,011.76	-7,985.88
DII Cash Market	19,730.38	15,141.50	4,588.88

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Sun Pharma	1984.80	3.38	2413.22
Nestle	1496.50	2.88	2320.37
Axis Bank	1300.00	2.77	6093.67
Max Healthcare	1042.10	2.76	1685.17
Grasim	3371.00	2.46	1019.10
Top Losers			
Adani Enterprise	2859.10	-9.76	12872.44
Adani Ports	1593.10	-6.70	9621.82
ITC	255.50	-3.95	24575.85
Bharti Airtel	1811.90	-3.75	16921.33
TMPV	308.85	-3.30	9986.16

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	90.76	2.78	49.40
WTI (USD/bbl)	85.64	2.85	50.31
Gold Spot (USD/t oz.)	4,431.38	-0.46	2.70
USD/INR	95.17	0.22	5.79
10 Year G-Sec India	6.95	0.61	5.64
US 10 Year Bond	4.778	0.42	13.22

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, Indian equities slumped due to higher oil prices and expectations of US rate hikes. The MSCI index rejig and new stock closing process caused significant stock-specific fluctuations.

Global

US stocks weakened on Monday, with Wall Street turning the page on a volatile month as a war-related jump in crude prices revived inflation fears and raised the likelihood of tighter monetary policy.

Japanese stocks closed mixed as renewed expectations of a US rate hike in September weighed on market sentiment. The Nikkei 225 fell 0.14% to 66,312, while the broader Topix gained 0.23% to 4,156.

Chinese stocks ended higher, recovering from earlier losses despite fresh signs of weak economic activity. The Shanghai Composite rose 0.86% to 3,986.3, while the Shenzhen Component gained 0.44% to 14,015.

Commodities & Currency:

The Indian rupee hit a nearly four-week high against the US dollar on the last day of August, and notched a monthly gain, on support from inflows related to a stock index rejig and central bank intervention.

Gold slipped on Monday as renewed Middle East attacks stoked inflation worries and hawkish comments from Federal Reserve Chair boosted expectations for a September rate hike, though bullion remained on track for its biggest monthly gain since January.

News:

India's economy grew 7.8% in the April-June quarter, government data showed on Monday, comfortably beating expectations as a surge in investment and manufacturing activity added to strong consumer demand in the South Asian economy.

Higher food inflation could squeeze spending on non-food discretionary items by absorbing a larger share of household disposable income, the Indian government said in its monthly economic report.

Shares of HDFC Bank closed at their lowest levels in 30 months on Monday as investors waited on the succession plan at India's top private lender after long-time CEO Sashidhar Jagdishan announced he would step down at the end of his term in late October.

India's fiscal deficit in the months of April-July stood at 4.55 trillion rupees ($47.81 billion), or 26.8% of the target for the financial year ending March 31, government data showed.

A quarterly MSCI rebalancing, seen as the first major stress test for India's new stock closing pricing system, drove about $4.1 billion of trades on the National Stock Exchange during the closing auction window.

India is likely to receive below-average monsoon rainfall in September after August precipitation came in 16% below normal, the weather department said on Monday, raising concerns about crop yields and economic growth in Asia's third-largest economy.