



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,382.60	-165.15	-0.70	0.00	-10.57
BSE Sensex	74,267.34	-508.40	-0.68	0.00	-12.82
Bank Nifty	53,643.10	-596.10	-1.10	0.00	-10.16
Nifty Midcap 100	60,827.95	-895.85	-1.45	0.00	0.13
Nifty Smallcap 100	17,979.80	-159.00	-0.88	0.00	1.55
S&P 500	7,599.96	19.9	0.26	0.00	10.81
DJIA	51,078.88	46.42	0.09	0.00	5.57
Nasdaq 100	30,513.86	180.68	0.60	0.00	21.06
Nikkei 225	66,934.33	604.83	0.91	0.00	29.14
Hang Seng	25,398.18	215.79	0.86	0.00	-3.57
Shanghai Com	4,057.74	-10.83	-0.27	0.00	0.85

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,382.60	53,643.10
Support	23,348 & 23,259	53,473 & 53,211
Resistance	23,635 & 23,724	54,324 & 54,586

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,725.89	21,637.57	-3,911.68
DII Cash Market	15,226.29	10,117.16	5,109.13

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Tech Mahindra	1543.20	4.00	5243.44
Infosys	1202.50	3.58	19439.33
Coal India	472.60	3.21	47716.52
TCS	2297.40	1.70	7505.10
JSW Steel	1299.40	1.67	1388.24
<b>Top Losers</b>			
HUL	2084.30	-3.21	1470.49
TATA Cons. Prod	1143.30	-2.98	2075.19
Shriram Finance	919.05	-2.97	8308.51
Max Healthcare	938.45	-2.76	3841.70
ITC	279.65	-2.53	23477.88

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	94.73	3.96	55.93
WTI (USD/bbl)	91.61	4.86	59.82
Gold Spot (USD/t oz.)	4,486.79	-1.18	3.57
USD/INR	95.00	0.00	5.60
10 Year G-Sec India	7.018	0.20	6.63
US 10 Year Bond	4.447	-0.13	6.73

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Monday, Indian equity benchmarks fell further due to concerns about foreign selloffs, a weak monsoon, and renewed Middle East tensions. GIFT Nifty futures were at 23,245.5 as of 7:49 am, indicating the benchmark Nifty 50 would open below Monday's close of 23,382.6.

#### Global

Wall Street stocks posted modest gains on Monday as investors watched developments in US-Iran peace negotiations and cheered the unveiling of a new computer chip that promises to bring artificial intelligence to personal computing.

Japan equities were higher at the close, as gains in the Real Estate, Banking and Textile sectors led shares higher. At the close in Tokyo, the Nikkei 225 gained 0.90% to hit a new all time high.

China stocks weakened to their lowest levels in six weeks, dragged down by the tech sector, after lukewarm factory data added to concerns about slowing growth momentum.

### Commodities & Currency :

The Indian rupee ended nearly flat as modest gains spurred by flows connected to MSCI's equity index rebalancing were eroded by persistent hedging demand from corporates, while traders kept their focus firmly on the upcoming monetary policy decision.

Gold prices fell as escalating tensions in the Middle East heightened inflation concerns and reinforced expectations that central banks may keep monetary policy tighter for longer.

### News:

India is likely to discuss Washington's Section 301 investigation and potential tariff measures with US trade officials, as the two nations seek to finalise a deal, an Indian government source said on Monday.

India's manufacturing sector expanded at its fastest pace in three months in May on sustained demand even as cost pressures were among the most intense in nearly four years and business optimism softened to its lowest since February, a survey showed on Monday.

India's top carmakers reported higher sales in May, with market leader Maruti Suzuki saying bookings for its compressed natural gas vehicles jumped 40% after fuel prices rose due to the energy shock from the Iran war.

Indian real estate firm Anant Raj said on Monday it will invest 250 billion rupees (\$2.6 billion) to develop data centre and cloud services in India's northern state of Haryana.

India's fiscal deficit stood at 4.4% of the gross domestic product for the year ended March 31, 2026, data showed on Monday, in line with government's revised estimates.

India's industrial output stood at 4.9% in April, government data showed on Monday, as surging energy costs and supply disruptions from the months-long Iran war weighed on parts of Asia's third-largest economy.

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