AJCONGLOBAL
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Daily Market Insight

~ Where the market left its footprints

03rd September 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	23,914.45	-141.35	-0.59	-0.59	-8.54
BSE Sensex	76,570.35	-373.93	-0.49	-0.49	-10.12
Bank Nifty	57,172.00	-237.6	-0.41	-0.41	-4.25
Nifty Midcap 100	63,001.60	-332.90	-0.53	-0.53	3.71
Nifty Smallcap 100	19,812.25	-74.00	-0.37	-0.37	11.90
S&P 500	7,666.60	35.13	0.46	0.46	11.27
DJIA	53,067.32	295.05	0.56	0.56	9.06
Nasdaq 100	29,143.33	66.11	0.23	0.23	15.36
Nikkei 225	64,325.64	-1889.7	-2.85	-2.85	24.10
Hang Seng	25,311.21	-18.52	-0.07	-0.07	-3.90
ShanghaiCom	3,941.39	-38.50	-0.97	-0.97	-2.04

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,914.45	57,172.00
Support	23,823 & 23,793	56,920 & 56,674
Resistance	23,926 & 23,938	57,224 & 57,318

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	26,715.88	20,027.51	6,688.37
DII Cash Market	17,639.89	14,826.91	2,812.98

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Coal India	417.85	4.05	34130.97
Adani Ports	1672.70	1.53	2338.94
Adani Enterprise	2891.80	0.97	1642.49
Bajaj Finserv	1990.00	0.91	730.99
TMPV	312.75	0.89	6667.46
Top Losers			
Eicher Motors	7711.50	-3.24	1117.59
Wipro	177.09	-2.54	12056.63
M&M	3190.00	-2.12	2883.17
Bajaj Auto	12130.00	-1.87	333.62
Asian Paints	2527.50	-1.86	497.89

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	94.30	-0.37	55.23
WTI (USD/bbl)	89.66	-0.62	56.42
Gold Spot (USD/t oz.)	4,331.20	0.05	-0.03
USD/INR	94.98	-0.03	5.57
10 Year G-Sec India	6.98	0.24	5.98
US 10 Year Bond	4.774	-0.42	14.62

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian equities slumped along with global markets as renewed US-Iran strikes increased the potential of interruptions to oil exports, raising inflation concerns amid a global bond rout that has pushed borrowing prices to multi-decade highs.

Global

Wall Street advanced, notching a partial rebound from a three-day losing streak as investors searched for deals among stocks and sectors that might have been oversold amid recent risk-off moves.

The Nikkei 225 fell 2.85% to 64,325, reaching a four-week low as rising global bond yields and oil prices put pressure on Japanese stocks.

Chinese stocks fell further as investors turned cautious amid a broad risk-off mood across Asian markets. Rising oil prices and growing tensions in the Middle East increased concerns about supply disruptions and higher inflation, raising expectations that major central banks may keep interest rates high for longer.

Commodities & Currency:

The Indian rupee will hold near current weak levels, a Reuter's poll of strategists found, although foreign currency deposits from non-resident Indians give the Reserve Bank of India further scope to intervene to limit depreciation.

Gold prices fell to their lowest in more than three weeks, pressured by a stronger dollar as the biggest exchange of fire between the US and Iran since July threatened to fuel global inflation.

News:

The Reserve Bank of India has stepped up its support for the rupee in recent sessions, shielding the currency from a surge in oil prices and rising US Treasury yields, with a flood of deposits from non-resident Indians bolstering the central bank's firepower.

India needs to review some of its financing rules and develop a stronger talent pipeline to achieve its ambitious goal of expanding nuclear power capacity to 100 gigawatts (GW) by 2047, officials and industry executives said on Wednesday.

India has invited applications from eligible sugar millers and refiners to allocate the remaining 202,550 metric tons of raw sugar under a duty-free import quota of 1 million tons approved by New Delhi last month, a government circular said.

ICICI Bank has mobilised about $17.88 billion under the Reserve Bank of India's foreign currency non-resident deposits scheme through August 31, the private lender said.

India is preparing a framework that would let AI agents make small digital payments without approval for every transaction, three sources familiar with the matter said, potentially making UPI one of the world's largest networks with agentic payments.