

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,032.80	-86.5	-0.36	-0.36	-8.08
BSE Sensex	77,017.79	-251.61	-0.33	-0.33	-9.59
Bank Nifty	54,547.05	-331.45	-0.60	-0.60	-8.65
Nifty Midcap 100	60,264.50	104.75	0.17	0.17	-0.80
Nifty Smallcap 100	18,182.40	49.9	0.28	0.28	2.70
S&P 500	7,259.22	58.47	0.81	0.40	5.84
DJIA	49,298.25	356.35	0.73	-0.41	1.89
Nasdaq 100	28,015.06	363.24	1.31	1.10	11.14
Nikkei 225	59,513.12	228.2	0.38	0.00	14.82
Hang Seng	25,898.61	-197.27	-0.76	-0.76	-1.67
Shanghai Com	4,112.16	4.65	0.11	0.00	2.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,032.80	54,547.05
Support	23,922 & 23,875	54,297 & 54,140
Resistance	24,075 & 24,122	54,807 & 54,964

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,392.91	14,014.49	-3,621.58
DII Cash Market	16,234.31	13,631.69	2,602.62

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
M&M	3210.80	3.36	6454.42
UltraTechCement	11963.00	1.74	350.05
Nestle	1477.80	1.42	2490.70
Bajaj Finserv	1794.60	1.37	1270.23
Hindalco	1054.70	1.15	4580.70
Top Losers			
Jio Financial	248.45	-1.70	16205.69
Coal India	1251.30	-1.53	24447.94
ICICI Bank	472.60	-1.53	6946.90
Eternal	248.47	-1.36	28498.22
Tech Mahindra	1452.20	-1.32	711.08

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	110.21	-3.70	81.42
WTI (USD/bbl)	102.25	-3.92	78.38
Gold Spot (USD/t oz.)	4,564.52	0.94	5.36
USD/INR	95.29	-0.21	5.92
10 Year G-Sec India	7.018	-0.01	6.63
US 10 Year Bond	4.424	-0.32	6.17

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, high crude oil prices linked to the Middle East crisis impacted on risk sentiment, causing Indian shares to fall and the rupee to reach a record low. GIFT Nifty futures were trading at 24,290 points, as of 7:55 am, indicating that the benchmark Nifty 50 would open 1% above Tuesday's close of 24,032.80.

Global

The S&P 500 and Nasdaq notched record high closes on Tuesday, lifted by Intel and other AI-related stocks, as a US-Iran ceasefire held firm and investors focused on strong quarterly earnings.

Hong Kong shares edged lower on Tuesday as rising tensions in the Middle East dampened risk sentiment, while mainland Chinese markets remained closed for a holiday.

Commodities & Currency :

The Indian rupee slid to a record low on Tuesday as a fragile truce in the Middle East came under strain after the US and Iran launched new attacks to wrestle for control of the Strait of Hormuz, a key artery for global energy supplies.

Gold prices rose on Tuesday after hitting a more than one-month low in the previous session, as investors assessed a fragile Middle East truce and the conflict's potential impact on inflation and interest-rate expectations.

News:

Vietnamese President To Lam is expected to discuss expanding defence ties with India during a visit to New Delhi this week, including the potential purchase of BrahMos missiles jointly developed with Russia, two sources said.

India's Zee Entertainment has sued fashion-to-beauty retailer Nykaa for allegedly using its copyrighted songs in Instagram reels to promote its products, seeking \$210,000 in damages, previously unreported court documents show.

India's auto dealerships are bracing for potential ripple effects from the ongoing Middle East conflict on fuel prices and supply chains, a senior industry official said on Tuesday, after retail vehicle sales hit a record for April.

Gautam Adani's eponymous firm, telecom operator Bharti Airtel, US-based Genpact and autoparts giant ZF Friedrichshafen are among the companies setting up treasury operations in India's tax-neutral finance zone, according to three sources.

India's Larsen & Toubro posted a 3.1% fall in quarterly profit on Tuesday, as the Middle East war disrupted the infrastructure giant's projects in the region.

Indian markets regulator SEBI on Tuesday proposed allowing online bond platforms to offer products regulated by the country's international financial centres authority, a move aimed at broadening access to overseas-listed debt and bolstering Gujarat's GIFT City as a global finance hub.

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