

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,330.95	298.15	1.24	0.88	-6.94
BSE Sensex	77,958.52	940.73	1.22	0.89	-8.49
Bank Nifty	55,981.05	1434	2.63	2.01	-6.25
Nifty Midcap 100	61,326.70	1062.20	1.76	1.94	0.95
Nifty Smallcap 100	18,534.10	351.7	1.93	2.21	4.68
S&P 500	7,365.12	105.9	1.46	1.87	7.39
DJIA	49,910.59	612.34	1.24	0.83	3.16
Nasdaq 100	28,599.17	584.11	2.08	3.21	13.46
Nikkei 225	59,513.12	228.2	0.38	0.00	14.82
Hang Seng	26,213.78	315.17	1.22	0.45	-0.47
Shanghai Com	4,160.17	48.02	1.17	0.00	3.40

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,330.95	55,981.05
Support	24,091 & 24,006	54,979 & 54,627
Resistance	24,365 & 24,450	56,119 & 56,471

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,459.21	20,294.11	-5,834.90
DII Cash Market	22,888.16	16,051.29	6,836.87

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Interglobe Avi	4520.20	6.65	2657.96
TMPV	358.15	5.29	11036.46
Shriram Finance	1004.10	4.12	5858.95
Trent	4289.80	3.73	1384.41
Asian Paints	2519.00	3.66	1395.99
<b>Top Losers</b>			
ONGC	280.80	-3.16	22858.01
Reliance	1437.90	-1.76	14221.79
L&T	4008.50	-1.13	9540.10
Power Grid Corp	315.95	-1.10	4884.12
NTPC	394.85	-0.95	11120.41

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	100.70	-8.36	65.76
WTI (USD/bbl)	94.41	-7.68	64.71
Gold Spot (USD/t oz.)	4,687.85	2.88	8.21
USD/INR	94.62	0.71	5.17
10 Year G-Sec India	6.922	-1.37	5.17
US 10 Year Bond	4.350	0.02	4.39

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

Indian equities rose on Wednesday, as a potential deal between the US and Iran to end the war led to lower crude prices, alleviating fears about the impact on growth and inflation in Asia's third-largest economy. GIFT Nifty futures were trading at 24,445 points as of 8:10 am, indicating that the benchmark Nifty 50 would open above Wednesday's close of 24,330.95.

#### Global

The S&P 500 and the Nasdaq surged to record-high closes on Wednesday, buoyed by signs of a resolution in the Middle East conflict, while strong earnings from Advanced Micro Devices sparked a rally in chipmakers and other AI-related stocks.

### Commodities & Currency :

The Indian rupee posted its best single day gain in a month on Wednesday, joining a global relief rally on rising hopes of a cessation of hostilities between the US and Iran, which sparked sharp gains across Asian currencies.

Gold prices hit their highest in more than a week on Wednesday following reports that the US and Iran may be nearing a peace deal, cooling fears of higher inflation and an extended period of elevated interest rates.

### News:

India's Godrej Consumer Products posted a 9.7% rise in fourth-quarter profit on Wednesday, driven by strong volume growth in its India business and continued momentum in international markets.

India's services sector growth picked up in April after falling to a 14-month low in March, driven by strong demand at home that offset slowing global orders, but optimism about the year ahead fell on Middle East uncertainties, a survey showed on Wednesday.

India is targeting trade worth \$25 billion with Vietnam by 2030, Prime Minister Narendra Modi said on Wednesday after talks with Vietnamese President To Lam, who is on his first visit to India.

India's offshore technology centers are expected to have generated \$98.4 billion in revenue for fiscal 2026, nearing levels earlier projected for 2030, according to IT industry body Nasscom and consultancy Zinnov, as global firms shift more work overseas to counter rising costs and geopolitical uncertainty.

India has no plans to curb sugar exports for now, despite lower output, as stable prices suggest weaker demand has offset some of the production shortfall, two government sources said on Wednesday.

India's Reliance Industries will shut some units at its 660,000 barrels per day refinery for 3-4 weeks for maintenance after Nayara Energy resumes operations later this month, a senior petroleum ministry official said on Wednesday.

India's Sula Vineyards reported a lower profit for the fourth quarter on Wednesday, as rising costs and weak demand squeezed the winemaker's margins.

### Disclaimer:

Ajcon Global Services Limited is a SEBI registered Research Analyst (INH000001170). This report is for informational purposes only and not an offer or solicitation to buy/sell securities. Investments in the securities market are subject to market risks; please read all related documents carefully before investing. The views expressed are based on publicly available information believed to be reliable, but no assurance is given for its accuracy or completeness. Ajcon and its associates may have commercial relationships with companies mentioned. Investors are advised to exercise independent judgment and consult their financial advisor before making investment decisions. For detailed Disclosure and Disclaimer, please click the below link: <http://ajcononline.com/disclosure-and-disclaimer-2/>