



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,430.35	159.50	0.66	1.77	-6.56
BSE Sensex	78,285.07	521.16	0.67	1.77	-8.10
Bank Nifty	58,291.50	353.00	0.61	0.45	-2.38
Nifty Midcap 100	62,471.50	281.20	0.45	0.75	2.83
Nifty Smallcap 100	19,319.10	144.00	0.75	2.05	9.12
S&P 500	7,537.43	54.19	0.72	0.72	9.90
DJIA	53,055.91	155.84	0.29	1.44	9.66
Nasdaq 100	29,697.87	368.66	1.26	-0.37	17.82
Nikkei 225	69,737.69	-6.38	-0.01	-1.05	34.54
Hang Seng	23,616.32	266.29	1.14	2.43	-10.34
ShanghaiCom	4,041.24	-2.41	-0.06	-1.73	0.44

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,430.35	58,291.50
Support	24,326 & 24,286	58,030 & 57,902
Resistance	24,457 & 24,498	58,441 & 58,569

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,686.10	11,443.07	243.03
DII Cash Market	19,727.56	15,936.14	3,791.42

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HDFC Bank	829.85	3.60	63203.33
Hindalco	980.40	2.85	4642.29
Bajaj Auto	10036.50	2.57	265.28
ONGC	243.90	2.55	22386.04
M&M	3201.20	2.05	2637.74
Top Losers			
Kotak Mahindra	381.30	-3.89	34164.88
Max Healthcare	1132.50	-1.81	1363.47
TCS	2057.60	-1.71	2567.39
Coal India	432.35	-1.45	5464.73
Bajaj Finserve	1870.70	-1.31	1228.23

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	71.98	-0.19	18.49
WTI (USD/bbl)	68.55	-0.20	19.59
Gold Spot (USD/t oz.)	4,160.92	-0.38	-3.96
USD/INR	95.40	-0.19	6.04
10 Year G-Sec India	6.68	-0.39	1.56
US 10 Year Bond	4.48	0.31	7.59

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares rose on Monday, boosted by HDFC Bank's positive quarterly business update and reduced crude oil prices. GIFT Nifty futures were at 24,546, as of 7:53 a.m. IST, indicating the Nifty 50 could open above Monday's close of 24,430.35.

Global

Wall Street's main indexes ended higher on Monday, with Broadcom and other chip stocks rallying as investors bought shares in companies related to AI that are expected to drive a strong second-quarter earnings season.

Japanese shares closed mixed as technology stocks remain under pressure, with the Nikkei 225 slipping 0.01% to 69,737, while the broader Topix gained 0.92% to 4,102.

On Monday, Chinese stock markets remained flat as investors redirected funds from the heavily saturated tech sector into energy, agriculture, and banking stocks. Meanwhile, Hong Kong's market experienced an uptick in share prices, reflecting a regional investor optimism shift.

Commodities & Currency :

The Indian rupee slipped to a three-week low as a broadly upbeat dollar pinched Asian currencies, with maturing contracts in the non-deliverable forward also adding to the pressure on the local unit.

Gold prices retreated from two-week highs on Monday, pressured by a firmer US dollar, though losses were limited as signs of a cooling US labour market eased expectations of a Federal Reserve rate hike.

News:

Indian state refiners Indian Oil Corp and Hindustan Petroleum Corp have together purchased about 8 million barrels of crude oil through tenders last week, trade sources said.

Indian government and auto industry officials on Saturday defended the mandatory rollout of petrol blended with 20% ethanol, saying years of testing and service data showed no evidence of widespread vehicle damage, despite public concerns over lower fuel efficiency and engine safety.

India's top information technology companies are expected to report another subdued quarter, as AI-driven pricing pressure, weak client spending, and global geopolitical turmoil continue to weigh on growth, nine brokerages said.

India's appetite for electric, hybrid and compressed natural gas vehicles accelerated after the Iran war triggered fuel price hikes, the president of the country's auto dealers' body said, with such models reaching a record share of passenger vehicle sales in June.

India's Tata Capital plans to raise funds through the sale of US dollar-denominated bonds maturing in three-and-a-half years, two merchant bankers aware of the matter said on Monday.

The Indian government will sell up to 5.04% stake in Cochin Shipyard via an offer for sale, according to an X post from the secretary of India's Department of Investment and Public Asset Management.

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