



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,326.65	-4.30	-0.02	0.86	-6.96
BSE Sensex	77,844.52	-114.00	-0.15	0.74	-8.62
Bank Nifty	56,047.40	66.35	0.12	2.13	-6.14
Nifty Midcap 100	62,003.15	676.45	1.10	3.06	2.06
Nifty Smallcap 100	18,695.65	161.55	0.87	3.11	5.60
S&P 500	7,337.11	-28.01	-0.38	1.48	6.98
DJIA	49,596.97	-313.62	-0.63	0.20	2.51
Nasdaq 100	28,563.95	-35.22	-0.12	3.08	13.32
Nikkei 225	62,833.84	3320.72	5.58	5.58	21.22
Hang Seng	26,626.28	412.50	1.57	2.03	1.09
Shanghai Com	4,180.09	19.92	0.48	0.48	3.89

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,326.65	56,047.40
Support	24,091 & 24,006	55,979 & 55,627
Resistance	24,365 & 24,450	56,119 & 56,471

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,997.95	18,338.84	-340.89
DII Cash Market	17,032.05	16,590.98	441.07

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
HDFC Life	625.40	3.14	22416.34
Bajaj Auto	10605.00	2.77	1498.25
M&M	3370.70	2.12	4916.19
Grasim	2960.60	1.57	603.38
NTPC	400.35	1.39	9700.38
<b>Top Losers</b>			
HUL	2272.20	-1.94	1859.01
TCS	2401.40	-1.40	5829.59
Tech Mahindra	1448.20	-1.26	1147.15
Titan Company	4307.50	-1.20	1377.63
ITC	307.40	-1.06	25718.62

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	101.05	-0.22	66.34
WTI (USD/bbl)	95.69	0.64	67.06
Gold Spot (USD/t oz.)	4,707.41	0.34	8.66
USD/INR	94.25	0.39	4.76
10 Year G-Sec India	6.933	0.16	5.33
US 10 Year Bond	4.389	0.07	5.33

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Thursday, Indian shares were flat due to reduced oil prices and optimism for a US-Iran peace deal, which countered profit-taking in certain sectors following a big gain the previous session.

#### Global

US stocks ended lower on Thursday, with Intel and other chip stocks retreating after a recent rally, while uncertainty around US-Iran peace talks weighed on the wider market.

Japanese stocks rose sharply, as trading resumed after a holiday pause, with investors enthusiastic about the global upswing, driven by expectations of a potential agreement between the US and Iran and strong growth in technology shares.

Optimism that the Middle East hostilities will conclude soon drove Hong Kong equities to a two-month high, as the city's stock market joined a global rally supported by easing oil prices and artificial intelligence-driven enthusiasm.

### Commodities & Currency :

The Indian rupee turned sharply higher on Thursday afternoon, boosted by a slump in crude oil prices, with stop-losses on short rupee wagers and dollar sales in the non-deliverable forward market also lifting the currency, traders said.

Gold rose on optimism over a potential US-Iran peace deal, easing concerns about inflation and prolonged higher interest rates, though gains were capped after a report said Tehran would not allow the reopening of the Strait of Hormuz.

### News:

Indian bike maker Royal Enfield plans to invest about 22 billion rupees (\$232.24 million) to set up a manufacturing plant in the southern state of Andhra Pradesh, it said on Thursday.

BlackRock, the world's largest money manager, is set to invest in a dollar bond to be issued by a unit of India's Shapoorji Pallonji Group this month, two people directly familiar with the transaction said.

India's Dabur beat expectations for quarterly profit on Thursday, helped by steady domestic demand and benefits from consumption tax cuts, even as its international business faced pressure amid the Middle East war.

India is planning to raise spending on its key scheme designed to refund local taxes paid on export goods and extend the programme's tenure by five years, two government officials said, as the Middle East war clouds the county's trade outlook.

The Indian government is likely to divest a 3%-4% stake worth 100 billion rupees (\$1.06 billion) in state-run miner Coal India, via the offer-for-sale route, broadcaster CNBC-TV18 reported on Thursday, citing sources.

Indian liquor maker Radico Khaitan's exports to the Gulf market are recovering after shipments stalled amid regional conflict, with dispatches gradually resuming since late April, a top executive said.

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