



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,398.70	-31.65	-0.13	1.64	-6.68
BSE Sensex	78,180.72	-104.35	-0.13	1.64	-8.23
Bank Nifty	58,200.70	-90.80	-0.16	0.29	-2.53
Nifty Midcap 100	62,285.30	-186.20	-0.30	0.45	2.53
Nifty Smallcap 100	19,213.40	-105.7	-0.55	1.49	8.52
S&P 500	7,503.85	-33.58	-0.45	0.28	9.41
DJIA	52,925.15	-130.76	-0.25	1.19	9.39
Nasdaq 100	29,173.02	-524.85	-1.77	-2.13	15.74
Nikkei 225	68,256.96	-1480.73	-2.12	-3.15	31.69
Hang Seng	23,496.89	-119.43	-0.51	1.92	-10.79
ShanghaiCom	3,990.24	-51.00	-1.26	-2.97	-0.82

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,398.70	58,200.70
Support	24,356 & 24,313	58,117 & 58,006
Resistance	24,495 & 24,538	58,477 & 58,588

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	18,414.01	18,020.82	393.19
DII Cash Market	18,897.44	19,280.87	-383.43

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1168.20	3.00	5179.53
Tech Mahindra	1447.50	2.92	4066.92
Infosys	1071.80	2.84	18866.30
Titan Company	4604.20	2.67	3385.95
SBI Life Insurance	1832.30	2.49	1702.49
Top Losers			
Trent	2927.80	-12.44	9059.51
Adani Enterprise	3107.20	-3.10	2093.55
Adani Ports	1833.90	-1.64	1818.24
Bharat Elec	419.15	-1.50	7821.98
Cipla	1451.80	-1.39	1164.88

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	74.10	2.93	21.98
WTI (USD/bbl)	70.44	2.76	22.89
Gold Spot (USD/t oz.)	4,141.64	-0.57	-4.40
USD/INR	94.97	0.46	5.56
10 Year G-Sec India	6.70	0.17	1.73
US 10 Year Bond	4.55	0.04	9.22

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, Indian share indices fell after a four-session surge due to profit-taking, despite a rebound in IT companies. Investors were looking for fresh triggers from the upcoming earnings season. GIFT Nifty futures were trading at 24,235 as of 8:00 am, signalling that the Nifty 50 could open below Tuesday's close of 24,398.7.

Global

Wall Street's main indexes ended lower, weighed down by losses in Micron Technology and other chipmakers due to mounting doubts about the sustainability of the AI-driven rally.

Japanese stock markets ended sharply lower on Tuesday, led by a broad selloff in technology shares. The Nikkei 225 fell 2.12% to close at 68,257, its lowest level in three weeks, while the broader Topix index declined 0.97% to 4,062.

Mainland China and Hong Kong stocks ended lower on Tuesday, led by property companies, as investors awaited guidance from minutes of the US Federal Reserve's latest meeting and fresh domestic economic data

Commodities & Currency :

The Indian rupee notched its biggest single-session gain in three weeks, boosted by a spurt in dollar selling in the non-deliverable forward market, which also prompted traders wagering against the currency to exit positions.

Gold fell on Tuesday as investors monitored escalating hostilities in the Middle East that sent oil prices higher, and braced for minutes from the US Federal Reserve's June meeting for guidance on the monetary policy outlook.

News:

India will supply BrahMos supersonic cruise missiles and Astra air-to-air missiles to Indonesia, an Indian government official said on Tuesday, as Indian Prime Minister Narendra Modi started a two-day visit to Jakarta.

SBI Funds Management, India's largest asset manager, will draw investments from Abu Dhabi Investment Authority (ADIA) and Singapore's GIC as part of its \$1.2 billion initial public offering, two sources with direct knowledge of the matter said.

India's Trent shed 147.88 billion rupees (\$1.56 billion) in market capitalisation on Tuesday after shares slumped 12.4%, as a first-quarter sales growth miss heightened concerns over slowing returns from its aggressive store expansion.

India's office market posted record leasing in the first half of 2026 as multinational companies expanded global capability centres and flexible workspace operators signed larger deals despite geopolitical uncertainty, property consultant CBRE said.

Foreign investors are returning to Indian financial stocks, with the sector drawing its biggest fortnightly inflows in 14 months in the second half of June as policy support, lower valuations and expectations of steadier earnings lifted demand.

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