



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,123.00	-243.70	-1.04	-1.11	-11.56
BSE Sensex	73,524.26	-719.08	-0.97	-1.00	-13.69
Bank Nifty	54,063.75	-432.5	-0.79	0.78	-9.46
Nifty Midcap 100	59,905.65	-849.25	-1.40	-1.52	-1.39
Nifty Smallcap 100	17,763.45	-346.85	-1.92	-1.20	0.33
S&P 500	7,405.73	21.99	0.30	-2.56	7.98
DJIA	50,786.01	-80.77	-0.16	-0.57	4.97
Nasdaq 100	29,414.26	456.66	1.58	-3.60	16.69
Nikkei 225	64,024.60	-2563.52	-3.85	-4.35	23.52
Hang Seng	24,657.06	-304.89	-1.22	-2.92	-6.38
ShanghaiCom	3,959.34	-68.40	-1.70	-2.43	-1.59

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,123.00	54,063.75
Support	23,078 & 23,031	53,887 & 53,743
Resistance	23,229 & 23,275	54,354 & 54,499

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	8,842.08	14,397.75	-5,555.67
DII Cash Market	16,683.18	11,517.94	5,165.24

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Max Healthcare	1007.45	3.09	5444.56
Power Grid Corp	290.30	1.63	8748.93
Tech Mahindra	1503.40	1.34	2467.96
Bharat Elec	412.95	1.16	12017.50
Nestle	1398.90	0.92	1107.62
Top Losers			
Wipro	181.76	-8.37	75164.05
Jio Financial	228.86	-3.39	13089.71
Eternal	248.30	-3.20	25126.66
Shriram Finance	896.65	-2.89	4584.43
Hindalco	1062.40	-2.76	4879.59

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	94.09	1.07	54.88
WTI (USD/bbl)	91.09	0.61	58.91
Gold Spot (USD/t oz.)	4,337.66	0.21	0.12
USD/INR	95.71	-0.80	6.39
10 Year G-Sec India	6.95	-0.33	5.66
US 10 Year Bond	4.564	0.04	9.53

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, Indian equities sank alongside Asian markets, while crude prices increased due to an escalation in the Middle East war. Brent crude prices increased by 4.3% to \$97 a barrel due to recent Israeli strikes on Iran and Lebanon, raising concerns about potential violence and interruptions to oil supplies.

Global

US stocks ended mostly higher on Monday, led by gains in the Nasdaq and chipmakers as investors sought bargains after Friday's sharp selloff and were relieved after Iran and Israel said they had halted attacks on each other.

Japan equities were lower at the close on Monday, as losses in the Paper & Pulp, Transport and Communication sectors led shares lower. China and Hong Kong stocks slid to their lowest levels in two months on Monday, tracking a global tech selloff, but pared losses by midday with some investors using the correction as a buying opportunity.

Commodities & Currency :

The Indian rupee reversed nearly all of the previous session's rally on Monday, pressured by rising oil prices, fragile risk appetite and patchy corporate flows.

Gold steadied on Monday as prospects for a potential Israel-Iran ceasefire helped the metal rebound from session lows, though strong US jobs data boosted expectations of a Federal Reserve rate hike and limited the upside.

News:

India is pushing for preferential new tariffs from the United States as part of talks to finalise an interim trade deal with Washington, an Indian trade official said on Monday.

India's inflation likely rose to the Reserve Bank of India's medium-term target of 4% in May, driven by a pickup in vegetable prices and higher fuel costs following the US and Israel war against Iran, a Reuters poll of economists showed.

India expects prices of both oil and gas to drop in the coming months, with enough stocks available despite the US-Israeli war with Iran that has squeezed energy supplies, Oil Minister Hardeep Singh Puri told broadcaster CNN-News18 on Monday.

India reported a surprise current account and balance of payments surplus in the January-March quarter of fiscal 2026 on strong earnings from the services sector, an increase in worker remittances and forex swaps conducted by the central bank.

India's Bharat Petroleum Corporation will shut a 120,000 barrel per day crude unit and some secondary units at its Mumbai refinery for maintenance in November, an industry source said on Monday.

India's largest state-run refiner and fuel retailer, Indian Oil Corporation, has raised the price of a 14.2-kg domestic LPG cylinder in Delhi from 913 rupees to 942 rupees with effect from June 7, according to its website.

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