

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,882.05	-516.65	-2.12	-0.52	-8.66
BSE Sensex	76,503.60	-1677.12	-2.15	-0.54	-10.20
Bank Nifty	56,742.60	-1458.1	-2.51	-2.22	-4.97
Nifty Midcap 100	61,322.75	-962.55	-1.55	-1.11	0.94
Nifty Smallcap 100	18,783.30	-430.1	-2.24	-0.78	6.09
S&P 500	7,482.71	-21.14	-0.28	-0.01	9.10
DJIA	52,348.39	-576.76	-1.09	0.08	8.20
Nasdaq 100	29,252.56	79.54	0.27	-1.87	16.05
Nikkei 225	66,819.05	-1437.91	-2.11	-5.19	28.91
Hang Seng	24,199.46	702.57	2.99	4.96	-8.12
ShanghaiCom	3,970.88	-19.36	-0.49	-3.44	-1.31

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,882.05	56,742.60
Support	23,806 & 23,689	56,539 & 56,179
Resistance	24,184 & 24,301	57,705 & 58,066

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,463.95	15,501.15	1,962.80
DII Cash Market	19,165.13	18,374.97	790.16

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
ONGC	247.00	1.15	24753.84
Bajaj Auto	10164.00	0.54	249.35
Hindalco	971.65	0.22	6547.10
Coal India	429.05	0.02	3686.63
Top Losers			
Jio Financial	229.99	-5.38	37304.62
Interglobe Avi	5124.00	-5.02	2044.08
Shriram Finance	1014.40	-4.91	6535.77
Maruti Suzuki	13951.00	-4.04	481.08
HUL	2135.80	-3.30	1326.69

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	78.19	5.45	28.71
WTI (USD/bbl)	73.70	4.63	28.58
Gold Spot (USD/t oz.)	4,085.66	-0.50	-5.69
USD/INR	95.56	-0.61	6.21
10 Year G-Sec India	6.76	1.02	2.76
US 10 Year Bond	4.58	-0.09	9.80

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian benchmark shares experienced their largest one-day loss in three months due to US President Donald Trump's announcement that a "peace accord" with Iran was "over." This fueled a jump in oil prices, which harmed investor morale and sent global stocks falling.

Global

The S&P 500 ended lower on Wednesday after US President Donald Trump said an interim deal aimed at ending the war with Iran was "over," while Broadcom led gains among recently battered chip stocks. Japanese stocks closed sharply lower on Wednesday, extending losses from the previous session as weak sentiment in global markets weighed on investors. The Nikkei 225 fell 2.11% to 66,819, while the broader Topix Index lost 1.37% to 4,006.

Chinese stock markets fell for a third straight session on Wednesday, with the Shanghai Composite slipping 0.49% to around 3,970.9 and the Shenzhen Component dropping 1.87% to 14,939.7. Both indexes closed at their lowest levels in about a month as rising tensions in the Middle East reduced investors' willingness to take risks across Asian markets.

Commodities & Currency :

The Indian rupee dropped to its weakest level in nearly a month on Wednesday after US President Donald Trump said the interim accord with Iran to end the war was "over," sending oil prices soaring and hurting Asian currencies.

Gold prices fell on Wednesday as oil prices surged and inflation concerns intensified after US President Donald Trump said an interim agreement aimed at ending the conflict with Iran was "over".

News:

India's restrictions on silver imports have created shortages in the world's biggest market for the precious metal, pushing premiums to their highest levels in six months despite weaker-than-usual demand.

India's central bank has reasserted a call for a cryptocurrency policy "leaning towards prohibition," while the country's tax department warned that trading via offshore exchanges is hard to track, government documents reviewed by Reuters showed.

A rush by foreign investors to unwind bets on interest rate hikes in India has pushed turnover in the country's five-year overnight index swap market to a record high, signalling a return of market confidence. Indian Oil Corp, the country's top refiner, has chartered a very large crude carrier (VLCC) to load Iraqi oil from Basrah Oil Terminal later this month after a partial reopening of the Strait of Hormuz, three shipping sources said.

Indian Prime Minister Narendra Modi's government is facing mounting anger over a mandatory 20% ethanol-blended fuel policy, with vehicle owners demanding choice and an opposition politician asking carmakers Maruti Suzuki and Toyota to provide clarity.

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