



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,242.10	119.10	0.52	-0.60	-11.11
BSE Sensex	73,918.76	394.50	0.54	-0.47	-13.23
Bank Nifty	55,194.50	1130.75	2.09	2.89	-7.56
Nifty Midcap 100	60,715.45	809.80	1.35	-0.18	-0.06
Nifty Smallcap 100	18,063.60	300.15	1.69	0.47	2.03
S&P 500	7,386.65	-19.08	-0.26	-2.81	7.70
DJIA	50,872.11	86.10	0.17	-0.40	5.15
Nasdaq 100	29,084.50	-329.76	-1.12	-4.68	15.39
Nikkei 225	65,416.63	1392.03	2.17	-2.27	26.21
Hang Seng	24,565.90	-91.16	-0.37	-3.28	-6.73
ShanghaiCom	4,010.03	50.69	1.28	-1.18	-0.33

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,242.10	55,194.50
Support	23,142 & 23,100	54,507 & 53,253
Resistance	23,275 & 23,317	55,329 & 55,583

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,735.47	19,301.50	-4,566.03
DII Cash Market	17,664.98	11,505.50	6,159.48

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Interglobe Avi	4537.60	4.08	1000.20
Jio Financial	234.21	2.34	9959.66
Eicher Motors	7203.00	2.17	547.10
SBI	1002.70	2.11	22142.48
Apollo Hospital	1275.00	1.98	22368.58
<b>Top Losers</b>			
ONGC	259.00	-2.13	10796.35
Titan Company	4104.90	-2.09	1284.96
NTPC	355.65	-1.86	14246.66
Power Grid Corp	285.70	-1.58	7973.13
Tech Mahindra	1483.80	-1.30	1330.11

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	91.63	-2.78	50.83
WTI (USD/bbl)	88.26	-3.33	53.98
Gold Spot (USD/t oz.)	4,270.52	-1.38	-1.43
USD/INR	95.36	0.37	5.99
10 Year G-Sec India	6.91	-0.66	4.96
US 10 Year Bond	4.564	0.39	8.82

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Tuesday, Indian share benchmarks gained, led by lenders, following the central bank's announcement of a concessional forex exchange facility for banks' overseas foreign-currency borrowings. Additionally, a pause in hostilities between Israel and Iran helped to lower oil prices.

#### Global

The S&P 500 and Nasdaq indexes fell on Tuesday as a rebound in technology shares faded and as President Donald Trump said the US must react to Iran's shooting down of a US helicopter.

Japan's Nikkei share average ended higher on Tuesday, as chip-related heavyweights recovered from heavy losses in the previous session.

China stocks bounced on Tuesday, while Hong Kong shares steadied, as bargain hunters pounced on battered chipmakers following Monday's rout, with sentiment supported by an overnight rebound on Wall Street.

### Commodities & Currency :

The Indian rupee closed stronger on a fall in oil prices, with expectations that regulatory measures will help India narrow its balance of payments deficit chipping away at the currency's bias towards persistent weakness.

Gold fell over 1% to a more than two-month low on Tuesday tracking a broader market sell-off and pressured by rising expectations of a U.S. interest rate hike this year, while investor focus turned to key inflation data due later this week.

### News:

Shares of Indian banks gained on Tuesday after the country's central bank extended a subsidised forex swap facility to overseas foreign currency borrowings by lenders

India's state-owned Steel Authority of India (SAIL) and NMDC Ltd are exploring acquisitions of coking coal assets in Russia as New Delhi seeks to secure supplies of critical raw materials, Indian sources said.

Indian quick commerce company Zepto is looking to raise up to \$837 million in its initial public offering, updated draft papers showed on Monday, setting the stage for one of the country's most anticipated listings this year.

India's fuel consumption rose to 19.93 million metric tons in May, while liquefied petroleum gas consumption continued to decline, data from the Petroleum Planning and Analysis Cell (PPAC) of the oil ministry showed.

Two of India's Tata Group infrastructure units are set to return to the corporate bond market in the coming days, after more than 15 months, two merchant bankers said.

India's sharp increase in gold import tariffs is fuelling a resurgence in smuggling that could exceed 100 metric tons this year, as soaring grey market margins allow smugglers to undercut banks and refiners of the precious metal, industry officials and bullion dealers said.

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Infosys	1196.90	4.76	32175.71
HCL Tech	1179.40	2.86	5756.76
Tech Mahindra	1467.10	2.59	6697.28
Eternal	247.21	2.41	33045.25
TMPV	361.20	2.28	15119.61
<b>Top Losers</b>			
Kotak Mahindra	381.95	-2.51	22567.89
UltraTechCement	11368.00	-1.67	347.78
TATA Cons. Prod	1210.90	-1.63	2163.85
Titan Company	4102.00	-1.62	711.40
Adani Ports	1762.80	-1.39	2274.99

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