

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,431.50	-203.60	-0.86	-2.60	-10.38
BSE Sensex	74,764.23	-813.35	-1.08	-2.83	-12.24
Bank Nifty	56,295.55	-482.00	-0.85	-1.94	-5.72
Nifty Midcap 100	62,592.80	-323.00	-0.51	-1.17	3.03
Nifty Smallcap 100	20,036.90	-96.85	-0.48	0.76	13.17
S&P 500	7,636.36	-37.16	-0.48	0.06	11.88
DJIA	52,386.25	-405.04	-0.77	-0.73	9.10
Nasdaq 100	29,421.55	-86.15	-0.29	1.18	17.07
Nikkei 225	65,142.78	-126.55	-0.19	-1.62	25.68
Hang Seng	25,274.96	-42.22	-0.17	-0.22	-4.04
ShanghaiCom	3,951.51	10.96	0.28	-0.71	-1.79

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,431.50	56,295.55
Support	23,424 & 23,392	56,274 & 56,168
Resistance	23,532 & 23,565	56,615 & 56,721

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,392.90	16,975.89	-582.99
DII Cash Market	18,130.76	16,621.72	1,509.04

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Enterprise	3104.70	5.13	5320.59
Max Healthcare	1037.50	4.48	4591.29
Adani Ports	1775.00	3.80	5527.53
Coal India	431.00	2.56	22791.56
Tata Steel	188.75	2.50	45985.33
Top Losers			
Infosys	1035.00	-4.34	13530.46
HDFC Life	514.00	-3.71	9024.19
HCL Tech	1229.80	-3.70	2099.17
Tech Mahindra	1508.00	-3.27	1329.20
Wipro	167.00	-2.62	12001.62

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	100.68	2.82	65.73
WTI (USD/bbl)	95.58	2.74	66.75
Gold Spot (USD/t oz.)	4,393.88	0.87	1.42
USD/INR	95.10	-0.29	5.71
10 Year G-Sec India	6.96	0.17	5.68
US 10 Year Bond	4.848	0.23	15.83

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian stocks plummeted to their lowest levels in three months as Brent crude futures surpassed \$100 a barrel for the first time since late July, raising concerns about the economy and inflation.

Global

US stocks closed lower on Wednesday as oil prices soared above \$100 a barrel, while Apple dipped and Treasury yields rose ahead of crucial inflation data expected later in the week.

The Nikkei 225 fell 0.19% to close at 65,143 on Wednesday, giving up its earlier gains as the Japanese yen strengthened further to its highest level in nearly seven months.

Chinese equities ended slightly higher on Wednesday, despite concerns over rising inflation and slowing economic growth. The Shanghai Composite gained 0.28% to close at 3,951.5, while the Shenzhen Component rose 0.15% to 13,723.3.

Commodities & Currency:

The Indian rupee fell past the key 95-per-dollar mark, as escalating conflict in the Middle East put oil prices back on the boil, prompting likely central bank intervention to limit the South Asian currency's losses.

Gold climbed more than 1% as the dollar remained under pressure, while investors awaited key US inflation data this week that would provide clues to the Federal Reserve's monetary policy amid an oil price rally.

News:

India's consumer inflation likely rose to a 20-month high in August, driven by higher food and fuel prices, marking a third straight month above the Reserve Bank of India's 4% medium-term target, a Reuters poll of economists showed.

Indian Prime Minister Narendra Modi said that Unified Payments Interface, the country's home-grown retail payment network, should aim to integrate with payment systems of more countries.

Volkswagen is exploring a strategic partnership with Indian conglomerate JSW Group to improve competitiveness and profitability in the world's third-largest car market.

National Stock Exchange of India is likely to price its initial public offering at 1,700 to 1,785 rupees per share, a source aware of the matter said.

Indian billionaire Gautam Adani's flagship firm Adani Enterprises said on Wednesday its airport unit will raise about \$1 billion from investors, including Temasek and BlackRock, in an expansion drive.

India's port-based sugar refineries are likely to divert about 250,000 metric tons of refined sugar to the domestic market, an industry executive said.

India's benchmark sponge iron prices surged to a two-year high in August as higher prices of imported coal and tight domestic supplies of the fuel push up production costs, traders and analysts said.

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