

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,261.60	233.55	0.97	-2.43	-7.21
BSE Sensex	78,205.98	639.82	0.82	-2.53	-8.20
Bank Nifty	56,950.80	931.00	1.66	-4.83	-4.62
Nifty Midcap 100	57,177.65	912.15	1.62	-1.72	-5.88
Nifty Smallcap 100	16,473.80	341.60	2.12	-0.95	-6.95
S&P 500	6,838.32	42.33	0.62	-0.63	-0.29
DJIA	48,035.41	294.61	0.62	-1.78	-0.72
Nasdaq 100	25,093.09	125.84	0.50	0.40	-0.45
Nikkei 225	54,248.39	1519.67	2.88	-6.56	4.66
Hang Seng	25,959.90	551.44	2.17	-0.38	-1.44
Shanghai Com	4,123.14	26.54	0.65	-1.42	2.48

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,261.60	56,950.80
Support	24,129 & 24,077	56,841 & 56,776
Resistance	24,301 & 24,353	57,050 & 57,116

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,188.32	17,860.96	-4,672.64
DII Cash Market	17,202.49	10,869.23	6,333.26

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	1062.90	7.67	14297.52
TMPV	345.20	3.98	13770.08
Eicher Motors	7536.50	3.72	494.73
Interglobe Avi	4380.40	3.39	2579.97
M&M	3293.70	3.33	2672.34
Top Losers			
Infosys	1295.60	-1.48	9600.17
Eternal	226.62	-1.28	47196.66
Reliance	1408.80	-1.07	18071.26
Bharti Airtel	1850.40	-0.87	11741.60
ONGC	269.20	-0.59	18476.37

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	83.73	-15.39	37.83
WTI (USD/bbl)	78.77	-16.94	37.42
Gold Spot (USD/t oz.)	5,229.12	1.76	20.70
USD/INR	91.81	0.57	2.04
10 Year G-Sec India	6.674	-0.66	1.40
US 10 Year Bond	4.127	0.75	-0.97

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, Indian equities climbed from their lowest levels in nearly a year as crude oil prices declined due to US President Donald Trump's de-escalation remarks.

Global

US stocks lost steam on Tuesday, with the S&P 500 giving up early gains to skid into negative territory as investors weighed fading hopes for an earlier-than-expected end to the US-Israeli war on Iran against a backdrop of renewed military threats and ongoing worries of economic stagflation.

Japan's Nikkei share gauge rallied on Tuesday, recovering some losses from a plunge in the previous session, as investors reacted to moves by major economies to tap oil reserves in order to stabilise markets shaken by the Middle East war.

Slumping oil prices acted as a catalyst for Hong Kong stocks, with the benchmark posting its biggest rebound in two weeks, after US President Donald Trump signalled a possible end to the Iran war and China's exports grew at the fastest pace in four years.

Commodities & Currency :

The Indian rupee rose on Tuesday, rebounding from a record low, as retreating oil prices and likely intervention by the central bank offset a hedging rush by importers amid concerns over the Iran war's disruption of energy supplies.

Gold rose nearly 2% on Tuesday, buoyed by a softer dollar and easing inflation concerns as oil prices pulled back amid indications the conflict in the Middle East could end soon.

News:

India will likely lean more on its coal capacity to meet peak power demand this summer as liquefied natural gas supplies tighten after shipping disruptions linked to the US-Israeli war on Iran hit exports from major producers, two industry officials said.

India is emerging as the top pick in Asia-Pacific private markets, offering global investors scale and resilience as activity in the Asia-Pacific slows, a survey by McKinsey & Company and the Indian Venture and Alternate Capital Association showed.

Rising vegetable oil prices and freight rates are pushing Indian buyers toward prompt shipments amid concerns deliveries of newly purchased soybean and sunflower oil could be delayed by the Middle East conflict, five dealers told Reuters.

India's cabinet on Tuesday approved easing restrictions on foreign investments from China and other land-bordering nations to boost capital inflows in the world's fifth-largest economy, the Economic Times newspaper reported citing sources.

Restaurants and hotels across India warned of disruptions and possible shutdowns on Tuesday, as the Iran war constricts supplies of cooking gas, prompting authorities to set up a panel to review industry requests.

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