

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,176.15	-150.50	-0.62	0.24	-7.54
BSE Sensex	77,328.19	-516.33	-0.66	0.08	-9.23
Bank Nifty	55,310.55	-736.85	-1.31	0.79	-7.37
Nifty Midcap 100	61,910.90	-92.25	-0.15	2.91	1.91
Nifty Smallcap 100	18,737.00	41.35	0.22	3.33	5.83
S&P 500	7,398.92	61.82	0.84	1.48	8.08
DJIA	49,613.97	12.02	0.02	0.20	3.22
Nasdaq 100	29,234.99	671.05	2.35	3.08	13.32
Nikkei 225	62,713.65	-120.19	-0.19	5.38	20.99
Hang Seng	26,393.71	-232.57	-0.87	1.14	0.21
Shanghai Com	4,179.95	-0.14	0.00	0.48	3.89

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,176.15	55,310.55
Support	24,050 & 23,800	54,900 & 54,500
Resistance	24,350 & 24,400	55,800 & 55,900

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	15,083.49	19,194.09	-4,110.60
DII Cash Market	21,296.87	14,548.74	6,748.13

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Titan	4509.00	4.68	4777.99
Apollo Hospital	8097.00	3.32	922.87
Asian Paints	2599.90	2.74	2327.90
Tata Consumer	1176.20	2.13	3672.20
Adani Ports	1760.40	1.59	4984.86
Top Losers			
SBI Bank	1019.30	-6.66	48065.91
COAL India	456.40	-2.20	15767.76
HDFC Bank	780.85	-1.91	38016.84
AXSB Bank	1268.30	-1.89	6358.60
Bajaj Finance	955.35	-1.79	5555.39

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	101.29	1.23	65.09
WTI (USD/bbl)	95.01	0.64	65.75
Gold Spot (USD/t oz.)	4,730.70	0.42	9.05
USD/INR	94.44	0.19	5.02
10 Year G-Sec India	6.984	0.74	6.06
US 10 Year Bond	4.364	-0.68	4.80

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

Indian equity markets extended their losses on Friday as escalating US-Iran tensions near the Strait of Hormuz dampened global risk sentiment. Persistent foreign investor outflows and rising geopolitical uncertainty kept traders on edge, leading to heightened volatility across the market.

Global

Wall Street closed higher with the S&P 500 and Nasdaq hitting record highs, driven by strong gains in AI-linked technology stocks and better-than-expected U.S. jobs data that reinforced confidence in the resilience of the U.S. economy despite ongoing geopolitical tensions and elevated oil prices.

Japan's benchmark Nikkei 225 Index slipped 0.19% to close at 62,713 on Friday, while the broader Topix Index declined 0.29% to 3,829, giving back some of the previous session's gains. Investor sentiment weakened amid renewed US-Iran clashes near the Strait of Hormuz, reigniting geopolitical concerns and prompting cautious trading across regional markets.

China's Shanghai Composite ended flat at a two-month high of 4,180 on Friday as investors grew cautious amid renewed US-Iran tensions and uncertainty ahead of next week's Trump-Xi summit.

Commodities & Currency:

The Indian rupee weakened to nearly 94.5 against the dollar, giving up part of its gains from the previous two sessions, as escalating US-Iran tensions in the Strait of Hormuz pushed oil prices upward.

Gold prices closed above \$4,720 per ounce, marking their highest level since April 22 and posting weekly gains of over 2%, as easing geopolitical tensions between the U.S. and Iran and stronger-than-expected U.S. jobs data improved investor sentiment while reducing concerns over prolonged high interest rates despite ongoing inflationary pressures.

News:

India's SEBI has proposed revamping share buyback rules by reintroducing open-market buybacks via stock exchanges, tightening execution timelines, and removing the mandatory requirement for investment bankers, while seeking public feedback on the changes. State Bank of India reported a 5.6% rise in March-quarter net profit to ₹19,684 crore but missed analysts' estimates due to a sharp fall in treasury income.

Vodafone Group is reportedly considering transferring part of its 19% stake in Vodafone Idea to the telecom operator's treasury stock to strengthen the Indian unit's capital structure and support its planned ₹350 billion debt raise.

India's civil aviation minister said the investigation into the Air India Boeing Dreamliner crash that killed 260 people last year is in its final stage, with the final report expected within a month.

Swiggy reported a narrower quarterly loss of 8 billion rupees as strong growth in its food delivery business and continued momentum in Instamart helped improve margins and boost revenue growth.

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