



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,214.95	-27.15	-0.12	-0.72	-11.21
BSE Sensex	73,983.18	64.42	0.09	-0.38	-13.15
Bank Nifty	55,100.30	-94.20	-0.17	2.72	-7.72
Nifty Midcap 100	59,810.20	-905.25	-1.49	-1.67	-1.55
Nifty Smallcap 100	17,822.50	-241.10	-1.33	-0.87	0.66
S&P 500	7,266.99	-119.66	-1.62	-4.38	5.96
DJIA	49,918.78	-953.33	-1.87	-2.27	3.18
Nasdaq 100	28,508.03	-576.47	-1.98	-6.57	13.10
Nikkei 225	64,179.27	-1237.36	-1.89	-4.12	23.82
Hang Seng	24,407.96	-157.94	-0.64	-3.90	-7.33
ShanghaiCom	3,993.23	-16.81	-0.42	-1.59	-0.75

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,214.95	55,100.30
Support	23,183 & 23,126	55,025 & 54,900
Resistance	23,367 & 23,424	55,430 & 55,555

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,047.79	16,172.77	-2,124.98
DII Cash Market	17,396.40	14,272.45	3,123.95

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Nestle	1438.30	1.98	2288.65
HUL	2169.50	1.72	2325.53
Axis Bank	1314.50	1.71	12262.61
Kotak Mahindra	388.10	1.68	21427.36
ICICI Bank	1293.30	1.44	25951.58
<b>Top Losers</b>			
Hindalco	1039.30	-3.47	8048.34
Coal India	451.00	-3.41	8127.90
Infosys	1145.30	-2.97	8887.63
ONGC	251.90	-2.74	10176.33
Eternal	239.80	-2.38	23687.65

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	93.67	2.43	54.19
WTI (USD/bbl)	90.46	2.59	57.82
Gold Spot (USD/t oz.)	4,113.18	-3.47	-5.06
USD/INR	95.27	0.09	5.90
10 Year G-Sec India	6.94	0.39	5.37
US 10 Year Bond	4.548	-0.09	9.15

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

Indian market indices closed mostly unchanged on Wednesday, with advances in heavyweight financials countering a selloff caused by a further escalation of the Middle East war.

#### Global

Wall Street's major stock indexes ended more than 1% lower on Wednesday, with chipmaker shares extending recent declines and with renewed tensions between the U.S. and Iran adding to investor uncertainty.

Japan's Nikkei share average retreated on Wednesday as renewed Middle East tensions prompted investors to rotate out of high-flying technology stocks sensitive to energy prices.

Chinese stocks turned lower as geopolitical sentiments stayed stressed. Inflationary pressures also weighed as Chinese producer price index jumped 3.9% from a year ago, hitting the highest since July 2022.

### Commodities & Currency :

The Indian rupee navigated competing impulses to end little changed on Wednesday, with traders pointing to volatility in oil prices, elevated dollar demand due to maturing non-deliverable forward contracts and likely central bank intervention.

Gold prices fell more than 3% on Wednesday as fears of a wider US-backed war with Iran stoked concerns about interest rate hikes to curb rising inflation, with investors focusing on key US data for clues on the monetary policy path.

### News:

Indian Prime Minister Narendra Modi is likely to hold bilateral talks with US President Donald Trump on the sidelines of the Group of 7 summit, with trade, visas and energy cooperation set to be high on the agenda, an Indian government source said.

Indian television broadcaster Zee Entertainment said on Wednesday it would raise 23 billion rupees (\$241.43 million) to fund its strategic and business initiatives.

India's equity mutual fund inflows fell to their lowest in a year in May as Iran war-driven market volatility drove away investors while gold ETFs saw record outflows after a call to curb bullion purchases promoted profit taking at all-time high prices.

Indian gold prices dropped nearly 2% on Wednesday to their lowest since early May, falling below pre-duty-hike levels following a sharp decline in global bullion prices.

Short-term Indian government bond yields fell to their lowest in three months on Wednesday, steepening the yield curve to a one-year high on expectations that banks will invest funds raised under the RBI's dollar inflow measures in this segment.

Meta Platforms will lease an AI-ready data centre to be built by billionaire Mukesh Ambani's Reliance Industries the US tech major said on Wednesday, deepening ties with the Indian conglomerate.

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