

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,477.80	46.30	0.20	-2.40	-10.21
BSE Sensex	74,902.59	138.36	0.19	-2.65	-12.07
Bank Nifty	56,471.95	176.4	0.31	-1.63	-5.43
Nifty Midcap 100	62,357.35	-235.45	-0.38	-1.54	2.65
Nifty Smallcap 100	20,021.95	-14.95	-0.07	0.68	13.09
S&P 500	7,591.70	-44.66	-0.58	-0.52	10.90
DJIA	52,150.74	86.64	0.17	-1.33	8.50
Nasdaq 100	29,103.51	-318.04	-1.08	0.09	15.46
Nikkei 225	65,270.95	128.17	0.20	-1.43	25.93
Hang Seng	24,954.47	-320.49	-1.27	-1.48	-5.25
ShanghaiCom	3,934.40	-17.10	-0.43	-1.14	-2.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,477.80	56,471.95
Support	23,370-23,350	56,000-55,900
Resistance	23,570-23,630	56,700-56,800

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,882.95	12,321.19	-438.24
DII Cash Market	13,326.33	12,300.48	1,025.85

Source: Bloomberg

Trading Activity	Close Price	1D(%) change	Volume ('000)
Top Gainers			
HDFC Life	526.15	2.36	4125.82
Powergrid	271.75	2.22	12187.66
ONGC	237.27	1.39	12771.34
Bharti Airtel	1839.00	1.34	4588.13
Tech Mahindra	1525.80	1.18	1405.65
Top Losers			
HCL Tech	1207.00	-1.85	2197.86
Hindalco	1014.00	-1.26	2172.77
Tata Steel	186.78	-1.04	23334.61
Adani Enterprise	3077.20	-0.89	1716.32
M&M	3123.80	-0.83	2140.62

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	107.82	2.33	77.25
WTI (USD/bbl)	102.73	2.79	79.09
Gold Spot (USD/t oz.)	4,323.49	-0.56	0.06
USD/INR	95.45	-0.36	6.09
10 Year G-Sec India	6.96	0.10	5.80
US 10 Year Bond	4.97	0.80	19.20

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmark indices ended the September 10, 2026 session in positive territory, following a late recovery during the closing auction session that helped the market snap a three-day losing streak, despite elevated volatility and continued concerns over oil prices and geopolitical uncertainty.

Global

US equities closed lower on Thursday, extending their losing streak to four sessions amid surging oil prices and Treasury yields that heightened inflation concerns ahead of the August CPI report.

Japanese equities ended flat on Thursday, weighed down by surging oil prices and global bond yields amid heightened concerns over inflation and tighter monetary policy.

The Shanghai Composite Index closed 0.43% lower at 3,934.4 points on Thursday, tracking broader regional losses across Asian markets. Surging oil prices—with crude remaining elevated due to supply disruption worries and geopolitical tensions involving Iran and the US—fueled growing global inflation concerns. Domestically, annual consumer inflation accelerated in August as higher energy and food costs began putting pressure on operations and consumer spending.

Commodities & Currency:

The Indian rupee settled lower near 95.45–95.46 against the U.S. dollar, pressured heavily by surging crude oil prices and persistent foreign fund outflows amid escalating West Asian tensions.

Gold prices fell on Thursday amid surging oil prices and Treasury yields, as heightened inflation concerns following stronger US PPI data increased expectations of a 25-bps Fed rate hike next week.

News:

India is pushing to link CBDCs across 11 BRICS nations to enable faster cross-border payments, with the proposal set for discussion at the September 12–13 New Delhi summit, despite political and technical hurdles.

India's NPCI is building a registry under its Unified Agent Protocol to verify and monitor AI agents making payments on UPI on behalf of users, according to 3 sources familiar with the discussions.

India has asked sugar mills to ensure adequate festive-season supplies and keep prices reasonable, warning of corrective action as sugar prices remain nearly 20% higher than two months ago.

India plans to expand biofuel use to strengthen energy security amid crude supply disruptions, with Brent crude breaching \$100 a barrel and the country already testing biofuel-diesel blends.

HDFC Bank has won all 7 Bahrain cases filed by Credit Suisse AT1 bond investors over alleged mis-selling, with the court rejecting the claims.

India's organised apparel retail revenue is projected to grow 12–13% in FY27, driven by value-fashion demand and expansion into smaller cities, while operating margins may ease to around 14% amid rising costs, as per CRISIL.

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