

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,683.30	-193.55	-0.75	-1.77	-1.77
BSE Sensex	83,576.24	-604.72	-0.72	-1.89	-1.89
Bank Nifty	59,251.55	-434.95	-0.73	-0.77	-0.77
Nifty Midcap 100	59,748.15	-474.40	-0.79	-1.65	-1.65
Nifty Smallcap 100	17,282.65	-318.4	-1.81	-2.38	-2.38
S&P 500	6,966.28	44.82	0.65	1.57	1.57
DJIA	49,504.07	237.96	0.48	2.32	2.32
Nasdaq 100	25,766.26	259.16	1.02	2.22	2.22
Nikkei 225	51,939.89	822.63	1.61	0.21	0.21
Hang Seng	26,231.79	82.48	0.32	-0.41	-0.41
Shanghai Com	4,120.43	37.45	0.92	2.41	2.41

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,683.30	59,251.55
Support	25,550 & 25,320	58,950 & 58,560
Resistance	25,950 & 26,140	59,540 & 59,960

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,093.29	14,862.60	-3,769.31
DII Cash Market	18,481.07	12,885.23	5,595.84

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Asian Paints	2825.50	1.40	1657.38
ONGC	234.09	1.15	12706.41
HCL Tech	1661.40	0.89	3281.31
Bharat Elec	418.65	0.72	22963.21
Cipla	1465.70	0.35	1804.27
Top Losers			
Adani Enterprise	2153.70	-2.72	1570.38
NTPC	336.00	-2.44	10161.74
Jio Financial	287.25	-2.15	11375.54
ICICI Bank	1404.30	-2.14	12555.64
Bajaj Auto	9562.50	-2.03	250.99

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.34	2.18	4.26
WTI (USD/bbl)	59.12	2.35	3.14
Gold Spot (USD/t oz.)	4,509.50	0.71	4.09
USD/INR	90.17	-0.15	0.22
10 Year G-Sec India	6.640	0.17	0.89
US 10 Year Bond	4.165	-0.05	-0.04

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian share indexes fell for the fifth time in a row on Friday, marking their biggest weekly drop in over three months as investors were frightened by increased concerns about US tariffs.

Global

The S&P 500 rallied to a record high close on Friday, lifted by Broadcom and other chipmakers, while a weaker-than-expected jobs report did little to alter expectations of interest rate cuts from the Federal Reserve this year.

Japan's Nikkei share average ended higher on Friday, driven by a surge in mega-cap Uniqlo store operator Fast Retailing on strong earnings.

A brief rebound in Hong Kong stocks, spurred by an improved China inflation reading, waned on Friday, as investors suspect that the easing deflationary trend could just be a blip.

Commodities & Currency :

The Indian rupee fell on Friday, driven by dollar demand from maturing non-deliverable forward holdings and corporate hedging as global markets anticipated a critical US Supreme Court verdict on trade tariffs.

Gold prices rose on Friday and were on track for a weekly gain, as investors weighed weaker-than-expected US payrolls data along with broader policy and geopolitical uncertainty.

News:

India's trade pact with the United States stalled last year because Prime Minister Narendra Modi did not make a telephone call to President Donald Trump ahead of a deal, Commerce Secretary Howard Lutnick said on Friday, giving an account of events that New Delhi has denied.

The Indian government on Friday capped Vodafone Idea's long-pending adjusted gross revenue dues at \$13.79 million annually over the next six years, easing near-term cash flow pressure for the embattled telecom carrier.

The IPO of India's largest coking coal miner was oversubscribed on the first day of bidding on Friday, as investors lined up for the first main board listing of 2026 and the maiden public sale from a firm in the key sector.

Reliance Jio Platforms is considering an initial public offering this year that would float 2.5% of the company, people familiar with the matter said, a move that could make it the country's largest-ever IPO worth more than \$4 billion.

India's forex reserves dropped by \$9.81 billion to \$686.801 billion in the week to Jan. 2, the Reserve Bank of India said on Friday.

Mahindra & Mahindra Ltd. reported over 20% growth in both production and sales in the third quarter of the current financial year, as reduction in GST rates sustained demand even after the festive season.

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