AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

14th July 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,211.00	**4.10**	**0.02**	**0.85**	**-7.40**
BSE Sensex	77,616.40	**47.01**	**0.06**	**0.90**	**-8.89**
Bank Nifty	58,131.45	**85.55**	**0.15**	**0.17**	**-2.65**
Nifty Midcap 100	63,040.95	**4.15**	**0.01**	**1.66**	**3.77**
Nifty Smallcap 100	19,422.95	**6.45**	**0.03**	**2.60**	**9.70**
S&P 500	7,515.34	**-60.05**	**-0.79**	**0.43**	**9.58**
DJIA	52,498.64	**-138.37**	**-0.26**	**0.37**	**8.51**
Nasdaq 100	29,264.10	**-561.01**	**-1.88**	**-1.83**	**16.10**
Nikkei 225	67,242.73	**-1315.00**	**-1.92**	**-4.59**	**29.73**
Hang Seng	24,213.72	**38.60**	**0.16**	**5.03**	**-8.07**
ShanghaiCom	3,913.79	**-82.37**	**-2.06**	**-4.83**	**-2.72**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,211.00	58,131.45
Support	24,143 & 24,118	57,700 & 57,540
Resistance	24,226 & 24,252	58,216 & 58,375

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,386.48	13,448.75	**-3,062.27**
DII Cash Market	17,393.46	15,221.76	**2,171.70**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TCS	2181.50	**5.44**	12382.62
HCL Tech	1221.20	**4.91**	9028.08
Tech Mahindra	1504.50	**3.42**	2285.07
Infosys	1102.60	**3.24**	20994.76
Bajaj Auto	10381.00	**2.22**	1009.24
Top Losers			
Grasim	3144.30	**-2.16**	654.39
Tata Steel	187.11	**-2.13**	47597.42
Nestle	1427.00	**-1.94**	2167.83
Interglobe Avi	5229.50	**-1.55**	659.84
Eternal	285.20	**-1.54**	14808.76

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	82.57	**8.60**	**35.88**
WTI (USD/bbl)	77.55	**8.60**	**35.29**
Gold Spot (USD/t oz.)	3,991.89	**-3.11**	**-7.86**
USD/INR	95.62	**-0.31**	**6.29**
10 Year G-Sec India	6.73	**0.25**	**2.27**
US 10 Year Bond	4.61	**-0.22**	**10.72**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian share indices recovered from a near-1% decline, as IT stocks climbed on the strength of significant collaborations and excellent earnings, countering concerns over fresh war in the Middle East.

Global

Tech shares pulled US stocks lower on Monday after President Donald Trump announced that he would reinstate a blockade on Iranian ports in the latest escalation of US-Iran hostilities that sent oil prices jumping and dampened risk appetite.

Japanese stocks fell, with the Nikkei 225 declining 1.92% and the broader Topix Index losing 0.71%, as escalating tensions in the Middle East dampened investor sentiment.

China's stock market fell sharply, with the Shanghai Composite dropping 2.06% and the Shenzhen Component losing 3.48%, as rising tensions between the US and Iran made investors cautious.

Commodities & Currency :

The Indian rupee and government bonds will likely track developments in the Middle East conflict alongside inflation data from the U.S. and India to gauge the impact of volatile oil prices on broader costs and central bank policy decisions.

Gold prices fell 3% on Monday after U.S. President Donald Trump said he was reinstating a naval blockade on Iran, boosting oil markets, reigniting inflation concerns and raising prospects of higher-for-longer US interest rates.

News:

India's retail inflation breached the central bank's target for the first time in 17 months, government data showed on Monday, setting the stage for interest rate hikes in an economy at risk from a prolonged Middle East conflict. The consumer price index rose to 4.38% year-over-year in June.

India's merchandise trade deficit widened to $30.43 billion in June as exports fell faster than imports, weighed down by shipping disruptions in the Strait of Hormuz linked to Middle East conflict.

India and the US did not reach a consensus on a trade agreement in recent talks, with India holding out for a better deal as Prime Minister Narendra Modi draws confidence from new trading partners, eased economic risks and political gains at home, officials and analysts said.

Indian software services exporter HCLTech beat analysts' expectations for first-quarter revenue on Monday, buoyed by strength in its financial services, technology and retail segments.

Tata Consultancy Services has secured a multi-million contract from Swiss-Swedish industrial technology firm ABB, India's top software services firm said.

India has asked renewable energy companies to either surrender transmission rights or provide higher bank guarantees if they fail to generate power, as the country seeks to free up grid capacity for projects that are actually producing electricity, according to a regulatory order.