



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,622.90	461.30	1.99	1.03	-9.65
BSE Sensex	75,527.95	1695.40	2.30	1.70	-11.34
Bank Nifty	56,814.80	1638.05	2.97	5.91	-4.85
Nifty Midcap 100	60,768.10	1442.70	2.43	-0.10	0.03
Nifty Smallcap 100	18,197.45	494.85	2.80	1.21	2.78
S&P 500	7,431.46	37.16	0.50	-2.22	8.35
DJIA	51,202.26	353.51	0.70	0.24	5.83
Nasdaq 100	29,635.95	189.77	0.64	-2.88	17.57
Nikkei 225	66,020.04	1802.77	2.81	-1.37	27.37
Hang Seng	24,718.10	468.81	1.93	-2.68	-6.15
ShanghaiCom	4,031.51	44.50	1.12	-0.65	0.20

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,622.90	56,814.80
Support	23,401 & 23,323	56,034 & 56,765
Resistance	23,654 & 23,732	56,905 & 57,174

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,064.61	13,146.79	-1,082.18
DII Cash Market	18,877.03	13,535.74	5,341.29

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	954.95	7.75	9760.44
Bajaj Finance	918.30	5.49	11729.67
L & T	4049.30	4.85	3065.79
Interglobe Avi	4709.70	4.60	2530.47
Titan Company	4184.00	3.95	1122.27
Top Losers			
Nestle	1375.70	-3.29	2380.73
ONGC	246.20	-2.53	31112.66
Tech Mahindra	1429.20	-2.45	2460.37
SBI Life Insurance	1706.00	-0.76	1438.25
TATA Cons. Prod	1100.70	-0.71	1455.07

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	87.33	-3.37	43.75
WTI (USD/bbl)	84.88	-3.23	48.08
Gold Spot (USD/t oz.)	4,219.33	0.17	-2.61
USD/INR	95.12	0.67	5.73
10 Year G-Sec India	6.89	-0.38	4.69
US 10 Year Bond	4.479	0.40	7.49

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Friday, Indian markets experienced their best session in two months, as crude prices fell due to prospects of a peace deal between the US and Iran, potentially reopening the Strait of Hormuz.

Global

US stocks ended higher on Friday as investors held out hope for a peace deal between Iran and the United States and as SpaceX shares surged in their debut, making it Wall Street's biggest public listing in history.

Japan's Nikkei share average ended nearly 3% higher on Friday, as investors scooped up stocks after U.S. President Donald Trump touted a possible peace deal with Iran.

China's stock markets bounced back on Friday. The Shanghai Composite rose 1.1% to close at 4,032, while the Shenzhen Component gained 0.8% to 14,963. The rebound followed strength across Asian markets, helped by renewed optimism that a Middle East peace deal could be near.

Commodities & Currency :

The Indian rupee surged against the dollar on Friday as growing expectations of a US-Iran peace agreement sent oil prices sharply lower and triggered an unwinding of long dollar positions.

Gold headed for a second straight weekly loss on Friday as expectations of higher interest rates weighed on the non-yielding metal ahead of next week's US Federal Reserve meeting.

News:

US Trade Representative Jamieson Greer will travel to India the week after the G7 leaders summit for further discussions on a possible trade deal, a senior US administration official said on Saturday, saying an agreement was possible.

India's retail inflation rose to 3.93% in May, driven by higher food and fuel costs, government data showed on Friday, while risks related to the Middle East conflict and a weak monsoon threatened to add further price pressures.

Nestle India on Friday rejected allegations that insects were found in its MAGGI noodles product, after news agency ANI reported, opens new tab India's food regulator had taken cognisance of social media complaints and issued notice to the consumer goods company.

India's finance ministry waived customs duties on all goods imported for nuclear power generation, covering imports made between April 1, 2019 and January 31, 2026, according to a government order dated June 11.

An Indian pollution regulator has alleged wastewater discharged from a Tata components factory for Apple's iPhone has contaminated the groundwater for nearby farms and warned of a forced shutdown unless Tata gives a satisfactory explanation.

India's markets regulator will review its delisting framework in an effort to ease capital market processes, its chairman said at a summit on Friday.

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