



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,665.60	-66.7	-0.26	-1.84	-1.84
BSE Sensex	83,382.71	-244.98	-0.29	-2.12	-2.12
Bank Nifty	59,580.15	1.35	0.00	-0.22	-0.22
Nifty Midcap 100	59,770.50	172.70	0.29	-1.61	-1.61
Nifty Smallcap 100	17,410.85	115.05	0.67	-1.66	-1.66
S&P 500	6,944.47	17.87	0.26	1.25	1.25
DJIA	49,442.44	292.81	0.60	2.19	2.19
Nasdaq 100	25,547.07	81.13	0.32	1.35	1.35
Nikkei 225	54,110.50	-230.73	-0.42	4.39	4.39
Hang Seng	26,923.62	-76.19	-0.28	2.22	2.22
Shanghai Com	4,112.60	-13.49	-0.33	2.22	2.22

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,665.60	59,580.15
Support	25,620 & 25,440	58,859 & 58,560
Resistance	25,950 & 26,140	59,770 & 60,050

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,121.23	17,902.47	-4,781.24
DII Cash Market	19,930.32	14,713.04	5,217.28

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Tata Steel	189.25	3.66	55907.78
NTPC	349.10	3.31	20389.92
Axis Bank	1298.80	2.92	7776.70
Hindalco	955.35	2.03	7050.65
ONGC	248.23	1.83	33094.09
Top Losers			
Asian Paints	2813.90	-2.51	958.25
TCS	3192.50	-2.31	3539.51
Maruti Suzuki	16152.00	-1.67	240.04
Tech Mahindra	1588.50	-1.63	1570.39
Sun Pharma	1700.70	-1.62	2479.68

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.76	-4.40	4.95
WTI (USD/bbl)	59.04	-4.80	3.24
Gold Spot (USD/t oz.)	4,618.02	-0.18	6.60
USD/INR	90.30	-0.12	0.37
10 Year G-Sec India	6.650	0.33	1.03
US 10 Year Bond	4.164	-0.14	-0.08

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity benchmarks fell on Wednesday 14th January, marking the seventh daily loss in eight sessions, as concerns over US tariffs and foreign outflows overpowered a rally in metal and bank shares.

Global

US stocks rose on Thursday after two days of declines as Morgan Stanley and Goldman Sachs shares shot up following upbeat quarterly results, while Taiwan-based chipmaker TSMC's blockbuster results boosted shares of US chipmakers.

Japan's Nikkei share average fell back from a record high on Thursday, as the yen's rebound weighed on exporters and a red-hot rally in technology shares lost steam.

Hong Kong stocks fell for the first time in five days on Thursday, weighed down by mainland Chinese tech giants, but analysts remain confident that Chinese assets will continue to outperform US peers due to cheaper valuations and ongoing geopolitical uncertainty after a period of consolidation.

Commodities & Currency :

The Indian rupee ended a choppy trading session modestly weaker on Wednesday, with corporate dollar appetite and likely intervention by the Reserve Bank of India tugging the currency in one direction and another.

Gold prices declined as weaker-than-expected US weekly jobless claims data boosted the dollar, while US President Donald Trump's moderated tone on Iran further weighed on safe-haven demand for the metal.

News:

India's merchandise trade deficit widened slightly to \$25.04 billion in December as imports rose, while exports to the world's largest consumer market remained firm despite tariff hikes.

India's renewable energy groups have objected to a regulatory proposal that could strip developers of interstate transmission system connectivity if long-term power purchase agreements are not timely signed, letters to the power regulator showed.

Coal India is scouting partnership opportunities in rare-earth mining across Australia, Russia, Argentina, Chile and several African countries, a top executive of its coking coal-focussed unit said on Thursday, as India looks to reduce reliance on China-dominated supply chains.

Mercedes-Benz grew its revenues in India in 2025 thanks to strong demand for its high-end luxury cars, its CEO said, even as stiff competition from rival BMW in the entry-level part of the luxury market pulled down the carmaker's overall sales in the country.

Indian brokerage Angel One reported a drop in third-quarter profit on Thursday, as regulatory curbs on equity derivatives designed to prevent speculative trading dampened retail investor participation.

India's unemployment rate rose marginally to 4.8% in the month of December from 4.7% in November, government data showed.

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