

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,151.10	-488.05	-2.06	-6.90	-11.46
BSE Sensex	74,563.92	-1470.50	-1.93	-7.07	-12.47
Bank Nifty	53,757.85	-1343.10	-2.44	-10.16	-9.97
Nifty Midcap 100	54,761.10	-1492.65	-2.65	-5.88	-9.86
Nifty Smallcap 100	15,895.25	-410.00	-2.51	-4.43	-10.22
S&P 500	6,632.19	-40.43	-0.61	-3.62	-3.30
DJIA	46,558.47	-119.38	-0.26	-4.80	-3.77
Nasdaq 100	24,380.73	-152.85	-0.62	-2.45	-3.27
Nikkei 225	53,819.61	-633.35	-1.16	-7.30	3.83
Hang Seng	25,465.60	-251.16	-0.98	-2.28	-3.31
Shanghai Com	4,095.45	-33.66	-0.82	-2.08	1.79

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,151.10	53,757.85
Support	23,016 & 22,871	53,407 & 53,011
Resistance	23,397 & 23,487	54,445 & 54,690

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,923.16	22,639.80	-10,716.64
DII Cash Market	22,707.84	12,730.42	9,977.42

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TATA Cons. Prod	1083.60	2.44	2855.69
HUL	2160.00	1.08	2298.88
Bharti Airtel	1803.40	0.12	8970.77
Top Losers			
L&T	3439.00	-7.54	10778.73
Hindalco	910.05	-6.16	10347.19
Tata Steel	183.51	-5.15	42683.95
JSW Steel	1119.30	-4.55	2284.55
UltraTechCement	10616.00	-4.27	723.90

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	103.14	2.67	69.78
WTI (USD/bbl)	98.71	3.11	72.21
Gold Spot (USD/t oz.)	5,019.49	-1.18	15.86
USD/INR	92.46	-0.28	2.77
10 Year G-Sec India	6.680	0.20	1.49
US 10 Year Bond	4.277	0.37	2.63

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares extended losses for a third session on Friday, with benchmark indexes recording their biggest weekly drop in years, as a raging war in the Middle East kept crude oil prices above \$100 a barrel, stoking inflation and growth jitters for the world's third-largest crude importing country. Gift Nifty signals positive start for Nifty 50, Sensex today amid US-Iran war, oil crises. The Gift Nifty was trading around 23,320 level.

Global

US stocks ended down on Friday capping a week in which erratic crude oil prices whipsawed equities, as investors gauged how the war in Iran was affecting the global oil supply.

Japanese equities declined on Friday, extending losses for a second straight session as higher oil prices and global market weakness pressured investor sentiment.

Hong Kong stocks extended losses on Friday as the US-Iran war showed no signs of ending, with a hardline stance from both sides pushing oil prices up.

Commodities & Currency :

The Indian rupee fell to a record low on Friday on concerns that the Iran war-induced surge in oil prices could disrupt the South Asian nation's growth-inflation dynamics and dent capital flows, with traders also pointing to elevated offshore dollar bids.

Gold prices slipped on Friday and were on track for a second consecutive weekly decline, pressured by a stronger dollar and inflation worries driven by the Iran war, which weighed on rate-cut expectations.

News:

India has sought safe passage for 22 of its vessels stranded west of the Strait of Hormuz, a foreign affairs ministry spokesperson said on Saturday, after Iran allowed a few Indian ships to sail through, in a rare exception to the blockade.

India's Ministry of Petroleum and Natural Gas said on Saturday that it has barred consumers with piped natural gas connections from retaining, obtaining or refilling domestic LPG cylinders under an amended supply order.

India will hold off on signing a trade deal with the United States for several months, four Indian sources said, as fresh investigations by President Donald Trump's administration into what it calls excess industrial capacity among trading partners add new friction after an early understanding, last month.

India has proposed an 'economic stabilisation fund' to provide fiscal headroom for the country to respond to global headwinds, Finance Minister Nirmala Sitharaman told parliament on Friday.

India's Hindalco Industries has halted output of extruded aluminium, a value-added aluminium product, due to a gas shortage in the wake of supply disruptions in the Middle East, according to a company notice seen by Reuters and two sources.

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