AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

17th July 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,072.75	-5.75	-0.02	0.28	-7.93
BSE Sensex	77,186.87	1.44	0.00	0.34	-9.39
Bank Nifty	57,582.25	-175.60	-0.30	-0.78	-3.57
Nifty Midcap 100	62,686.75	-256.45	-0.41	1.09	3.19
Nifty Smallcap 100	19,336.25	-19.10	-0.10	2.14	9.21
S&P 500	7,572.40	28.81	0.38	1.19	10.41
DJIA	52,658.64	150.37	0.29	0.68	8.84
Nasdaq 100	29,502.60	-83.69	-0.28	-1.03	17.05
Nikkei 225	66,835.54	-1915.97	-2.79	-5.16	28.94
Hang Seng	25,008.60	327.50	1.33	8.47	-5.05
ShanghaiCom	3,882.41	-73.17	-1.85	-5.59	-3.50

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,072.75	57,582.25
Support	24,050 & 24,018	57,449 & 57,328
Resistance	24,155 & 24,147	57,840 & 58,960

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,576.08	17,781.64	-4,205.56
DII Cash Market	19,236.80	16,250.39	2,986.41

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Interglobe Avi	5265.50	1.83	996.19
Wipro	177.74	1.77	11184.57
HCL Tech	1187.40	1.66	5147.44
Bajaj Finance	1037.60	1.60	9079.08
Maruti Suzuki	13783.00	1.47	356.85
Top Losers			
Eternal	286.45	-2.83	31866.27
SBI Life Insurance	1822.10	-2.37	898.10
Bharat Elec	407.10	-0.94	5679.24
Shriram Finance	1024.40	-0.91	2703.22
HDFC Bank	808.30	-0.88	18698.19

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	84.17	-0.92	38.55
WTI (USD/bbl)	78.88	-0.90	37.61
Gold Spot (USD/t oz.)	3,983.23	-1.90	-8.06
USD/INR	96.35	-0.09	7.10
10 Year G-Sec India	6.75	-0.38	2.52
US 10 Year Bond	4.55	-0.09	9.18

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities closed little changed on Thursday, with a rally in IT stocks countering a post-results decline in important banking businesses. However, a rising crisis in the Middle East kept investors at bay.

Global

Chip stocks pulled the Nasdaq and the S&P 500 lower on Thursday as they continued to lead broader market moves despite generally upbeat US economic data and a strong start to second-quarter earnings season.

Japanese stocks closed lower, with the Nikkei 225 Index dropping 2.79% to 66,835 and the Topix Index falling 1.45% to 4,029, ending a two-day winning streak.

Chinese stocks ended lower, with the Shanghai Composite falling 1.85% to 3,882.4 and the Shenzhen Component losing 1.97% to 14,488.7. Both indices closed at their lowest levels in more than three months as heavy selling in technology stocks weighed on market sentiment.

Commodities & Currency :

The Indian rupee ended modestly weaker, unable to benefit from a dip in oil prices and broad strength in regional currencies in the face of dollar demand linked to maturing non-deliverable forward contracts.

Gold fell 2% to a more than two-week low, as escalating Middle East tensions pushed oil prices and US Treasury yields higher, heightening inflation concerns and reinforcing expectations of elevated US interest rates.

News:

India is seeking to push domestic manufacturing for items worth $51 billion in imports, three government sources said, as Prime Minister Narendra Modi seeks to reduce the country's reliance on overseas suppliers.

Ransomware group World Leaks has posted on the dark web a huge cache of files related to India's largest nuclear plant, including purported blueprints of parts of its facilities and supplier details — information it labelled as coming from Reliance Group.

The National Stock Exchange of India said on Thursday it had received approval from the country's markets regulator to launch derivatives contracts on the Nifty India FPI 150 Index from August 12.

Indian software services provider Tech Mahindra's first-quarter revenue beat expectations on Thursday, with growth in the firm's manufacturing segment and a weak rupee helping the topline.

India's No.4 software services provider Wipro posted lower-than-expected first-quarter revenue on Thursday, hurt by weakness in its manufacturing segment and a part of its Americas business.

India has raised windfall taxes on exports of diesel and aviation turbine fuel as global oil prices surge amid an escalation of the US-Iran conflict, according to a government order.