



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,618.00	-31.95	-0.14	-2.08	-9.67
BSE Sensex	75,200.85	-114.19	-0.15	-2.68	-11.72
Bank Nifty	53,409.15	-127.85	-0.24	-2.68	-10.55
Nifty Midcap 100	61,022.00	548.20	0.91	1.43	0.45
Nifty Smallcap 100	17,863.55	206.8	1.17	-1.48	0.90
S&P 500	7,353.61	-49.44	-0.67	1.71	7.22
DJIA	49,363.88	-322.24	-0.65	-0.27	2.03
Nasdaq 100	28,818.84	-175.53	-0.61	4.00	14.33
Nikkei 225	60,550.59	-265.36	-0.44	1.74	16.82
Hang Seng	25,797.85	122.67	0.48	-1.14	-2.05
Shanghai Com	4,169.54	38.01	0.92	0.23	3.63

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,618.00	53,409.15
Support	23,409 & 23,320	52,991 & 52,782
Resistance	23,699 & 23,788	53,667 & 53,876

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,907.55	20,365.04	-2,457.49
DII Cash Market	16,951.95	13,150.27	3,801.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Infosys	1196.90	4.76	32175.71
HCL Tech	1179.40	2.86	5756.76
Tech Mahindra	1467.10	2.59	6697.28
Eternal	247.21	2.41	33045.25
TMPV	361.20	2.28	15119.61
Top Losers			
Kotak Mahindra	381.95	-2.51	22567.89
UltraTechCement	11368.00	-1.67	347.78
TATA Cons. Prod	1210.90	-1.63	2163.85
Titan Company	4102.00	-1.62	711.40
Adani Ports	1762.80	-1.39	2274.99

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	111.22	2.72	76.87
WTI (USD/bbl)	104.15	3.16	80.04
Gold Spot (USD/t oz.)	4,462.75	-1.40	5.34
USD/INR	96.54	-0.40	7.10
10 Year G-Sec India	7.110	0.95	8.35
US 10 Year Bond	4.667	0.02	12.23

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities closed slightly changed on Tuesday, as gains in information technology firms due to a higher dollar were offset by losses in banks. Investors were awaiting clarity on the prospects of a deal between the US and Iran.

Global

Wall Street's main indexes closed lower on Tuesday with the Nasdaq leading declines, after the benchmark 10-year Treasury yield climbed to its highest level in more than a year on mounting inflation concerns as oil prices stayed elevated and investors were anxious about the lack of a peace agreement between the US and Iran.

Japan's Nikkei share average surrendered early gains to end lower on Tuesday, as technology heavyweights tracked overnight declines in their US peers, even as positive data prompted investors to buy economically sensitive stocks.

China stocks struggled for direction on Tuesday, while Hong Kong shares rose as investors assessed the impact of the US-China summit outcomes and the global bond selloff.

Commodities & Currency :

The Indian rupee fell to a record low for a sixth consecutive day, ending lower for eight sessions in a row on Tuesday, weighed down by mounting external pressures as the prolonged US-Iran conflict drives a sustained rise in crude oil prices and pushes US Treasury yields higher. Gold prices fell by more than 1% on Tuesday on a firmer U.S. dollar and as persistent inflation fears kept interest rate hike expectations and Treasury yields high.

News:

India state-fuel retailers raised petrol and diesel prices by less than a rupee per litre on Tuesday, the second increase in a week to recover some losses from high crude prices resulting from the Iran war.

Shares of Adani Group companies jumped as much as 5.3% on Tuesday, after the Trump administration moved to dismiss criminal fraud charges against billionaire Gautam Adani, easing a key legal overhang on the ports-to-power conglomerate.

India's top copper producers, including Adani, Vedanta and Hindalco, are opposing plans to make copper wire made by secondary refiners acceptable under government quality standards, saying products made from scrap pose safety risks.

Microsoft's biggest data center in India is on track to open by mid-2026, its country head said on Tuesday, as the tech giant spends heavily to bolster its position in one of the world's largest markets for artificial intelligence services.

Indian Oil Corp, the country's top fuel retailer, is suffering a revenue loss of 617 rupees (\$6.39) on the sale of a cylinder of liquefied petroleum gas (LPG) compared to 171 rupees in April after the Iran war pushed up the prices, its finance chief said.

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