

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,346.40	75.80	0.33	-2.95	-10.71
BSE Sensex	74,294.96	-19.63	-0.03	-3.44	-12.79
Bank Nifty	56,358.70	302.95	0.54	-1.83	-5.62
Nifty Midcap 100	62,191.25	759.15	1.24	-1.81	2.37
Nifty Smallcap 100	19,875.70	340	1.74	-0.05	12.26
S&P 500	7,650.50	12.74	0.17	0.25	11.55
DJIA	51,682.64	-95.4	-0.18	-2.05	6.82
Nasdaq 100	29,644.17	197.19	0.67	1.95	17.61
Nikkei 225	65,018.95	882.7	1.38	-1.81	25.44
Hang Seng	24,750.78	146.49	0.60	-2.29	-6.03
Shanghai Com	3,911.87	36.27	0.94	-1.71	-2.77

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,346.40	56,358.70
Support	23,200 & 23,050	55,800 & 55,700
Resistance	23,500 & 23,650	56,800 & 57,000

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	38,461.63	37,862.09	599.54
DII Cash Market	17,310.04	16,290.35	1,019.69

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Ports	1824.00	4.93	4148.80
Adani Enterprises	3020.00	3.31	1628.13
Bharti Airtel	1893.30	3.12	14189.78
HDFC Bank	731.00	2.52	39400.71
Bajaj Finance	1040.30	2.49	8201.66
Top Losers			
TCS	2105.00	-3.88	6875.43
Tata Motors PV	303.80	-3.40	18037.11
SBI Life	1731.00	-2.03	929.37
Coal India	409.90	-1.94	7700.87
Maruti Suzuki	12103.00	-1.90	659.77

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	103.87	-0.91	70.98
WTI (USD/bbl)	100.30	-1.58	74.98
Gold Spot (USD/t oz.)	4,378.63	0.85	1.07
USD/INR	95.87	0.07	6.57
10 Year G-Sec India	7.07	0.33	7.40
US 10 Year Bond	5.00	1.33	19.90

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

Indian equities closed mixed on Friday, with the Sensex falling 0.03% and Nifty rising 0.33%, as hawkish Fed signals, geopolitical concerns, sustained IPO activity and weakness in Tata Group stocks weighed on sentiment.

Global

US equities ended mixed on Friday, with the Nasdaq gaining 0.7% while the Dow fell 95 points, as rising Treasury yields and persistent Middle East energy-supply concerns renewed inflation fears and weighed on rate-sensitive and credit-sensitive sectors.

Japan's Nikkei 225 rose 1.38% surpassing 65,000, as technology and AI-related stocks rallied despite the BOJ's 25-bps rate hike and uncertainty over the pace of further monetary tightening.

Chinese equities rebounded on Friday, with the Shanghai Composite rising 0.94%, as technology stocks led gains amid optimism over upcoming US-China talks and hopes of a delay in fresh tariffs, while both major indices ended the week higher.

Commodities & Currency:

The Indian rupee strengthened to around ₹95.8 per dollar, recovering from seven-week lows on easing crude prices, expectations of FPI inflows from the NSE IPO and likely RBI intervention, though elevated oil prices and strong importer dollar demand remained key headwinds.

Gold rose to a one-week high of \$4,380 and posted its first weekly gain in four weeks, supported by easing oil prices and lower inflation concerns, although gains were capped by a stronger dollar and expectations of further rate hikes from the Fed.

News:

The US passed legislation authorising tariffs of up to 100% on countries including India that continue buying Russian oil, putting pressure on India's energy security and potentially complicating ongoing India-US trade ties.

Tata Sons' board reappointed N. Chandrasekaran for another five-year term despite opposition from Tata Trusts, intensifying a governance dispute over leadership, a potential listing of the holding company and capital allocation within the conglomerate.

India's food regulator FSSAI initiated legal action against Nestle India over three infant nutrition products, citing prohibited promotional claims and a follow-up formula sample found non-compliant with prescribed biotin standards.

Engineers India expects higher order opportunities from Middle Eastern plans to build pipelines, oil terminals and marine infrastructure to bypass the Strait of Hormuz, with the company's ₹17,000 crore order book set to expand as regional conditions improve.

Apple is set to launch Apple Pay in India next month with Axis Bank as its initial banking partner, while talks with HDFC Bank and ICICI Bank remain ongoing, marking its entry into India's rapidly growing digital payments market.

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