AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

22nd July 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,187.70	-50.80	-0.21	0.76	-7.49
BSE Sensex	77,470.11	-238.41	-0.31	0.71	-9.06
Bank Nifty	57,835.35	-109.65	-0.19	-0.34	-3.14
Nifty Midcap 100	62,987.60	185.85	0.30	1.58	3.68
Nifty Smallcap 100	19,428.05	101.6	0.53	2.63	9.73
S&P 500	7,509.20	65.92	0.89	0.35	9.49
DJIA	52,224.64	385.38	0.74	-0.15	7.94
Nasdaq 100	29,155.18	550.95	1.93	-2.19	15.67
Nikkei 225	66,232.19	2091.07	3.26	-6.02	27.78
Hang Seng	25,132.29	-10.76	-0.04	9.01	-4.58
ShanghaiCom	3,864.37	68.09	1.79	-6.03	-3.95

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,187.70	57,835.35
Support	24,146 & 24,117	57,794 & 57,693
Resistance	24,243 & 24,273	58,118 & 58,220

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,327.88	14,677.72	1,650.16
DII Cash Market	14,638.54	15,295.42	-656.88

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Shriram Finance	1061.50	2.52	7633.09
Bajaj Finserv	1900.60	2.10	1668.70
Eicher Motors	7689.50	1.67	451.08
UltraTechCement	12094.00	1.60	830.84
HCL Tech	1239.50	1.49	4642.32
Top Losers			
HDFC Bank	761.45	-2.08	42246.01
SBI	1044.40	-1.47	10514.89
Reliance	1303.70	-1.47	12753.41
Dr Reddys Labs	1206.00	-1.40	2182.51
TCS	2221.10	-1.33	2382.16

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	91.01	2.01	49.81
WTI (USD/bbl)	84.98	2.10	48.27
Gold Spot (USD/t oz.)	4,082.42	1.86	-5.77
USD/INR	96.24	0.22	6.97
10 Year G-Sec India	6.79	0.27	3.22
US 10 Year Bond	4.62	-0.09	10.97

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, India's equity benchmarks dipped due to weakness in leading private lender HDFC Bank and confusing signals from the Middle East.

Global

Wall Street's main indexes closed higher on Tuesday, with the Nasdaq leading gains as a steep rally in semiconductor shares helped shift the focus away from the latest Middle East hostilities and tariff battles, while investors looked ahead to major technology earnings reports.

Japanese stocks rallied, with the Nikkei 225 surging 3.26% and the broader Topix Index rising 2.44%, as investors returned from a long holiday weekend and bought back shares after last week's sharp decline.

Chinese stocks rose strongly, with the Shanghai Composite gaining 1.79% and the Shenzhen Component jumping 4.81%, as investors welcomed fresh measures from authorities to support the technology sector after its recent sharp decline.

Commodities & Currency :

The Indian rupee firmed slightly as hopes of diplomacy between the US and Iran pulled the brakes on an oil rally that had driven the currency to a two-month low.

Gold rose more than 1% on hopes of a diplomatic breakthrough between the US and Iran, which could ease energy prices and temper expectations of a hawkish Federal Reserve.

News:

India's top carmaker Maruti Suzuki said on Tuesday it would increase vehicle prices by up to 30,000 rupees ($311.74) from August, its second portfolio-wide hike in about two months, citing sustained cost pressures.

TVS Motor, India's third-largest two-wheeler maker, reported a 51.4% jump in quarterly profit as robust demand for higher-margin motorcycles helped cushion the impact of a surge in raw material costs triggered by the Iran war.

Indian automaker Bajaj Auto reported a 42.3% rise in first-quarter profit on Tuesday on strong domestic and overseas demand.

IndiGo, India's largest airline, signed a preliminary agreement with CFM International on Monday to buy over 1,000 LEAP-1A engines, marking a record order for the French-US engine maker that is emerging from industry-wide congestion over repairs.

SBI Funds Management ended 6.2% higher in its stock market debut on Tuesday, valuing the firm at nearly $13 billion, as investors bet on growth in the country's $853 billion asset management industry.

German carmaker Volkswagen AG is in advanced talks to sell a stake in its India business to the JSW industrial conglomerate, in order to infuse fresh capital and bolster the unit, Bloomberg News reported on Tuesday, citing sources.