

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,446.80	117.80	0.50	-2.53	-10.33
BSE Sensex	74,828.25	299.17	0.40	-2.75	-12.16
Bank Nifty	56,548.90	333.35	0.59	-1.50	-5.30
Nifty Midcap 100	62,396.45	433.30	0.70	-1.48	2.71
Nifty Smallcap 100	19,991.50	176.05	0.89	0.53	12.92
S&P 500	7,706.03	-58.61	-0.75	1.00	13.21
DJIA	51,517.16	-352.04	-0.68	-2.39	7.20
Nasdaq 100	30,470.29	-262.10	-0.85	4.84	21.92
Nikkei 225	65,018.95	882.7	1.38	-1.81	25.44
Hang Seng	24,834.12	-253.63	-1.01	-1.96	-5.71
ShanghaiCom	3,936.52	-15.61	-0.39	-1.09	-2.16

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,446.80	56,548.90
Support	24,376 & 24,348	56,302 & 56,204
Resistance	24,466 & 24,494	56,619 & 56,716

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,580.40	11,962.95	1,617.45
DII Cash Market	14,404.90	12,063.44	2,341.46

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Bajaj Finance	1043.20	3.41	8618.52
Hindalco	1003.80	3.17	5158.52
Tata Steel	190.82	3.16	39798.33
Apollo Hospital	9069.00	2.64	419.57
JSW Steel	1297.80	2.43	1356.04
Top Losers			
HCL Tech	1256.70	-1.08	2724.43
Titan Company	4880.00	-0.98	769.74
Infosys	1020.50	-0.86	5108.73
Coal India	424.55	-0.81	7956.16
TCS	2089.60	-0.73	2228.40

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	100.54	1.30	65.50
WTI (USD/bbl)	91.16	0.71	59.04
Gold Spot (USD/t oz.)	4,306.76	-1.24	-0.59
USD/INR	95.75	-0.16	6.42
10 Year G-Sec India	7.04	0.49	7.03
US 10 Year Bond	5.114	-0.08	12.41

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian share benchmarks climbed as oil prices remained near their lowest level in over two weeks. However, continuing Middle East concern limited advances.

Global

Wall Street ended lower on Wednesday, pulled down by Alphabet and Amazon, as Treasury yields climbed and Iran's president said Tehran would never surrender to US pressure.

The Japan stock market will remain closed for trading from Monday, 21 September to Wednesday, 23 September.

Chinese stocks ended lower on Wednesday as investors stayed cautious ahead of the closely watched Trump-Xi summit. Market sentiment remained subdued after preliminary talks in New York failed to reach an agreement to extend the tariff truce, which is due to expire in November.

Commodities & Currency:

The Indian rupee ended modestly weaker on Wednesday, tracking declines in Asian peers as expectations of further US Federal Reserve rate hikes lifted the dollar.

Gold prices fell in range-bound trade on Wednesday, pressured by a stronger dollar and hawkish remarks from US Federal Reserve officials that reinforced expectations of tighter monetary policy.

News:

India's business growth accelerated in September on stronger demand in both manufacturing and services, a preliminary survey showed, though weaker export momentum and more subdued hiring tempered the upbeat picture.

India is investigating LG Electronics and Samsung for allegedly paying lower tariffs on imported display parts of high-end TVs, five sources told Reuters, putting under scrutiny the premium entertainment devices both South Korean giants have bet big on.

Shares of Hero Motors rose 6.5% on Wednesday after a subdued market debut, following the Indian auto parts maker's \$104.2 million initial public offering.

India's new fast-track entry route for trusted foreign investors has drawn 164 registrations in just over 100 days, data from the Indian depository showed on Tuesday, signaling early adoption by sovereign wealth funds and pension funds, among others.

India's Prime Minister Narendra Modi is expected to visit Canada in December to sign a trade deal, the Globe and Mail reported.

India's food safety authority on Wednesday tightened its proposed warning labels for packaged products, saying they would be applicable even if one nutrient of concern salt, sugar or fat was high, according to a court filing seen by Reuters.

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