



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,021.65	197.55	0.83	1.89	-8.88
BSE Sensex	76,991.22	790.54	1.04	2.60	-10.55
Bank Nifty	58,150.35	966.60	1.69	6.60	-4.23
Nifty Midcap 100	62,135.25	64.90	0.10	2.04	2.17
Nifty Smallcap 100	18,879.30	73.40	0.39	4.59	6.22
S&P 500	7,358.21	-7.24	-0.1	-3.09	7.39
DJIA	51,854.17	182.00	0.35	1.15	6.79
Nasdaq 100	29,220.06	-127.22	-0.43	-3.82	16.43
Nikkei 225	69,174.97	-613.41	-0.88	4.26	34.64
Hang Seng	23,412.18	75.90	0.33	-8.12	-11.40
ShanghaiCom	4,110.81	4.56	0.11	1.20	2.06

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,021.65	58,150.35
Support	23,852 & 23,781	57,376 & 57,098
Resistance	24,082 & 24,153	58,279 & 57,557

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,744.73	18,588.13	-1,843.40
DII Cash Market	17,274.01	13,636.75	3,637.26

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Interglobe Avi	5207.20	4.95	21451.22
Adani Enterprise	3069.70	3.60	25278.12
Trent	3247.00	3.31	39509.89
Tech Mahindra	1461.60	3.25	34515.53
Bajaj Finance	990.95	2.97	98737.77
Top Losers			
Bajaj Auto	9,750.00	-2.74	4260.13
NTPC	357.05	-2.07	127708.98
ONGC	240.00	-1.78	102780.33
Tata Steel	190.16	-1.76	513057.89
Bharat Elec	413.55	-1.54	96207.59

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	72.66	-1.64	27.13
WTI (USD/bbl)	69.12	-1.69	27.91
Gold Spot (USD/t oz.)	3,970.75	-0.73	-4.80
USD/INR	94.39	-0.31	5.30
10 Year G-Sec India	6.787	-0.77	4.34
US 10 Year Bond	4.407	0.16	7.48

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian shares rose due to lower crude oil prices and reduced concerns about interest rate hikes. Heavyweight banks also benefited from the central bank's decision to authorize loans against foreign accounts.

Global

The Nasdaq and S&P 500 closed lower on Wednesday, dragged by tech stocks on nagging concerns about high-flying valuations, but falling crude prices boosted airlines and other travel stocks and the Dow finished higher.

Japanese equities closed lower on Wednesday, extending losses from the previous session as weakness in global technology stocks weighed on investor sentiment. The Nikkei 225 Index fell 0.88% to 69,175, while the broader Topix Index declined 0.67% to 3,964.

Chinese stock markets recovered on Wednesday, with the Shanghai Composite rising 0.11% to close at 4,111 and the Shenzhen Component gaining 1.24% to 16,051. The rebound came after the previous sessions decline, as investors returned to technology stocks following a broader global market selloff.

Commodities & Currency :

The Indian rupee bucked the weakness seen in most Asian peers on Wednesday as likely central bank intervention shielded the currency from a stronger dollar that rose as traders positioned for potential Federal Reserve rate hikes.

Spot gold prices slipped below a key psychological level of \$4,000 per ounce level for the first time since November 2025 on Wednesday, under pressure from a firmer US dollar and growing expectations that interest rates will remain elevated.

News:

A fire at a New Delhi data centre used by global tech firms has left some customers fearing the loss of decades of data and caused network disruptions for Google Cloud services in India, according to a company letter and sources.

India and the United States discussed pathways to conclude an interim trade deal, the Indian government said in a statement on Wednesday, after talks between its trade minister Piyush Goyal and US Trade Representative Jamieson Greer.

Walmart's Flipkart and Amazon said on Wednesday they are speeding up expansion of their "quick commerce" business in India with a focus on smaller cities, as the two global giants compete in the \$11-billion sector dominated by domestic players.

India's Trade Minister Piyush Goyal will visit the United Kingdom between June 25 and 27 for talks ahead of the rollout of the India-UK trade agreement on July 15, the government said on Wednesday.

India's central bank has proposed rules requiring banks to strengthen oversight of risks tied to AI and machine-learning models, mandating board-approved policies, stronger controls and model inventories.

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