

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,063.10	-383.70	-1.64	-4.13	-11.79
BSE Sensex	73,580.54	-1247.71	-1.67	-4.37	-13.63
Bank Nifty	55,438.50	-1110.4	-1.96	-3.43	-7.16
Nifty Midcap 100	60,990.15	-1406.30	-2.25	-3.70	0.39
Nifty Smallcap 100	19,684.75	-306.75	-1.53	-1.01	11.18
S&P 500	7,704.13	-1.90	-0.02	0.96	12.36
DJIA	51,355.15	-162.02	-0.31	-2.07	6.47
Nasdaq 100	30,478.86	8.56	0.03	4.76	20.88
Nikkei 225	65,513.99	495.04	0.76	-1.06	26.39
Hang Seng	24,761.13	-72.99	-0.29	-2.24	-5.99
ShanghaiCom	3,888.37	-48.15	-1.22	-2.30	-3.36

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,063.10	55,438.50
Support	23,040 & 22,985	55,345 & 55,209
Resistance	23,220 & 23,276	55,786 & 55,923

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,111.22	18,138.58	-5,027.36
DII Cash Market	18,196.90	13,895.72	4,301.18

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1399.00	1.16	1580.78
ONGC	239.00	0.89	8493.75
NTPC	326.60	0.18	7662.58
Top Losers			
HDFC Life	526.90	-6.16	17905.95
Bajaj Finance	982.00	-5.87	13385.66
Axis Bank	1186.50	-4.56	10890.66
Bajaj Finserv	1762.30	-4.56	1520.05
Adani Enterprise	2900.00	-3.11	1082.46

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	105.15	2.01	73.09
WTI (USD/bbl)	93.76	1.74	63.57
Gold Spot (USD/t oz.)	4,272.45	-0.36	-1.38
USD/INR	95.96	-0.23	6.67
10 Year G-Sec India	7.11	0.88	7.98
US 10 Year Bond	5.185	0.43	22.78

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Thursday, Indian equities slumped the most in 10 weeks due to rising oil prices, which raised inflation concerns and dragged on morale. Financials led the decline, citing concerns over insurance commission caps.

Global

The S&P 500 and Nasdaq ended near unchanged on Thursday, as uncertainty about the Middle East lifted oil prices and Treasury yields. Japans Nikkei 225 rose 0.76% to close at 65,514 as the market reopened after an extended holiday. Technology and AI-related stocks led the gains, catching up with strong moves in global tech shares.

China stocks fell as uncertainty continued over the extension of the US-China trade truce. The Shanghai Composite dropped 1.22% to 3,888.4, while the Shenzhen Component declined 2.34% to 13,317.

Commodities & Currency:

The Indian rupee fell to a one-week low as a jump in oil prices and little progress in US-Iran talks raised concerns that inflation could prompt further global rate hikes.

Gold prices eased, pressured by rising oil prices and US Treasury yields, while expectations the Federal Reserve could tighten monetary policy further weighed on sentiment.

News:

The National Stock Exchange of India closed 1.85% higher on its market debut on Thursday, ending a decade-long effort to list and becoming one of the world's 10 most valuable publicly traded bourses. US e-commerce retailer Amazon will invest \$3 billion to expand its India quick commerce business by 2030, two sources said, its biggest bet yet on a sector where rivals have raced ahead by popularising deliveries within minutes.

JSW Group wants Volkswagen to bear a \$1.4 billion domestic tax liability as the companies negotiate a joint venture for the German automaker's passenger vehicle business in India, Bloomberg News reported on Thursday, citing sources.

Indian copper producers have urged the government to reduce the indirect goods and services tax (GST) on copper products to 5% from 18%, arguing that the current rate locks up more than 490 billion rupees (\$5.11 billion) in working capital.

HSBC is re-entering India's equity broking business after an absence of more than a decade, seeking to capitalise on a robust pipeline of share sales and rising demand from wealthy clients for equity market products, two people with direct knowledge of the matter said.

India's Adani Group will invest 1 trillion rupees (\$10.43 billion) in West Bengal by 2035, Chairman Gautam Adani said on Thursday, expanding its presence across sectors ranging from power generation and logistics to data centers.

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