



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,031.70	312.40	1.32	-0.36	-8.09
BSE Sensex	76,488.96	1073.61	1.42	-1.01	-10.21
Bank Nifty	55,293.65	1238.3	2.29	0.76	-7.40
Nifty Midcap 100	61,966.60	577.30	0.94	3.00	2.00
Nifty Smallcap 100	18,202.70	246.5	1.37	0.39	2.81
S&P 500	7,473.47	27.75	0.37	3.37	8.97
DJIA	50,579.70	294.04	0.58	2.18	4.54
Nasdaq 100	29,481.64	124.37	0.42	6.39	16.96
Nikkei 225	65,158.19	1819.12	2.87	9.49	25.71
Hang Seng	25,606.03	219.51	0.86	-1.88	-2.78
Shanghai Com	4,152.57	39.67	0.96	-0.18	3.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,031.70	55,293.65
Support	23,952 & 23,920	54,785 & 54,593
Resistance	24,053 & 24,084	55,407 & 55,599

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,083.12	11,261.37	821.75
DII Cash Market	16,434.96	12,578.08	3,856.88

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eicher Motors	7414.00	6.19	1354.54
Adani Enterprise	2849.70	4.87	3277.92
Bajaj Finance	941.90	2.77	7065.53
TMPV	373.25	2.72	10356.09
L&T	4033.40	2.72	2099.93
Top Losers			
Max Healthcare	1000.85	-2.19	3847.23
ONGC	284.95	-1.74	12837.05
Hindalco	1099.60	-0.87	7677.23
Nestle	1413.60	-0.67	812.16
Bajaj Auto	10491.00	-0.55	564.52

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	96.14	-7.15	58.26
WTI (USD/bbl)	90.41	-6.41	57.73
Gold Spot (USD/t oz.)	4,564.82	1.23	5.37
USD/INR	95.24	0.49	5.86
10 Year G-Sec India	7.027	-0.92	6.76
US 10 Year Bond	4.506	-1.13	8.14

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, Indian equities reached a two-week high as progress in US-Iran peace talks led to lower oil prices and increased interest for risk assets.

Global

US stocks rose on Friday, with the Dow reaching an intraday record high, as investors cheered signs of progress in talks to end the Middle East conflict and a strong corporate earnings season.

Japan's benchmark Nikkei 225 stock average surged to close above 65,000 for the first time ever on Monday, backed by expectations for an end to the fighting between the United States and Iran.

Mainland China stocks closed higher on Monday, lifted by the coal sector after the country's worst mine disaster in 17 years raised expectations that stricter safety scrutiny would tighten supply, while semiconductor shares also aided the market.

Commodities & Currency :

The Indian rupee strengthened for the third consecutive session on Monday, its longest winning streak in a month, powered by market interventions by the central bank and a slump in crude oil prices on hopes of a US-Iran peace deal.

Gold rose more than 1% on Monday as hopes of a peace deal to end the Iran war sent the dollar and oil prices lower, easing fears of inflation and higher-for-longer interest rates.

News:

Indian Finance Minister Nirmala Sitharaman urged the country on Monday to focus on fuel, fertiliser and foreign exchange and underlined Prime Minister Narendra Modi's plea to conserve foreign exchange as "very important" amid the Gulf crisis.

Schneider Electric expects its India data center business to outpace broader operations in the country over the next four to five years, driven by surging demand for AI-ready infrastructure, according to a senior executive.

Indian banks have sought subsidised forex hedging costs from the Reserve Bank of India to raise overseas borrowings, according to three sources, as the central bank seeks to shore up dollar inflows into the economy.

India's markets regulator has proposed changes in the framework for the pre-agreed price at which options contracts trade, according to a proposal paper published on the regulator's website on Monday.

India's state-owned fuel retailers increased diesel prices by 2.71 rupees (\$0.0283) per litre and petrol by 2.61 rupees, dealers said on Monday, the fourth hike in May to recoup some losses driven by higher crude costs due to the Iran war.

India will need a coordinated push across government, companies and academia on skilling and policy if it wants to become an AI powerhouse, an IBM executive said, as the technology threatens the country's position as a global services hub.

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