AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

26th October 2026

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,600.00	-87.65	-0.39	0.79	-13.56
BSE Sensex	73,123.83	-125.56	-0.17	1.69	-14.16
Bank Nifty	54,287.35	-638.35	-1.16	-0.30	-9.08
Nifty Midcap 100	55,800.65	-1263.30	-2.21	-4.99	-8.15
Nifty Smallcap 100	17,739.45	-536.45	-2.94	-6.92	0.20
S&P 500	7,623.68	-39.75	-0.52	-0.56	11.74
DJIA	52,220.21	-653.07	-1.24	2.57	9.27
Nasdaq 100	28,957.53	-1.16	-0.00	-5.06	14.89
Nikkei 225	62,693.16	-214.68	-0.34	-9.08	20.95
Hang Seng	23,093.37	158.69	0.69	-3.67	-12.32
ShanghaiCom	3,690.48	32.45	0.89	-3.19	-8.28

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,600.00	54,287.35
Support	22,427 & 22,330	54,006 & 53,759
Resistance	22,745 & 22,843	54,807 & 55,054

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,445.54	13,557.89	887.65
DII Cash Market	19,232.31	15,996.95	3,235.36

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	317.40	4.25	55091.71
Apollo Hospital	7730.00	1.65	496.46
ONGC	227.50	1.11	12949.88
Asian Paints	2307.00	0.97	836.47
TCS	2530.00	0.92	6857.94
Top Losers			
Shriram Finance	865.00	-3.98	7141.14
Adani Enterprise	2477.00	-2.86	1787.86
JSW Steel	1185.50	-2.83	2278.72
Jio Financial	205.03	-2.74	19149.17
Adani Ports	167.67	-2.70	30332.38

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	114.86	1.49	89.07
WTI (USD/bbl)	101.24	1.78	76.62
Gold Spot (USD/t oz.)	4,026.95	0.05	-7.05
USD/INR	94.94	-0.12	5.53
10 Year G-Sec India	7.47	0.19	13.56
US 10 Year Bond	4.99	0.71	20.75

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Rising oil prices and Middle East tensions fueled fears about inflation and company earnings, causing Indian shares to fall on Friday and for the week.

Global

US stocks closed lower on Friday while technology shares steadied to end a turbulent week for the market-driving AI trade, and investors looked ahead to a busy slate of corporate earnings and a Federal Reserve interest-rate policy meeting.

Japan equities were lower at the close, as losses in the Paper & Pulp, Transport and Communication sectors led shares lower.

The Shanghai Composite rose 0.89% to close at 3,690.5, while the Shenzhen Component climbed 2.79% to 11,673.8, rebounding from a more than two-month low in the earlier session as increased state-backed ETF buying helped support both benchmarks.

Commodities & Currency:

The Indian rupee weakened for a second straight session on Friday as surging oil prices spurred risk aversion, erasing gains made earlier in the week and leaving the currency little changed, despite easing expectations of further US rate hikes.

Gold prices steadied after hitting a three-month low earlier on Friday but were on track for their steepest weekly loss since June, as rising oil prices fuelled higher-for-longer Federal Reserve rate expectations and pressured the non-yielding precious metal.

News:

India's business activity expanded at its fastest pace in four months in October as stronger orders drove a services-led pickup, but hiring almost stalled as companies met rising workloads with existing staff, a preliminary survey showed.

Shares of Swiggy, an Indian online food delivery and quick-commerce firm, fell to a record low on Friday after wider losses in its quick-commerce business renewed concerns over cash burn and the company's path to profitability.

Indian drugmaker Dr Reddy's Laboratories reported a better-than-expected quarterly profit on Friday, as domestic demand helped cushion the slowdown in its key US market.

India remained a net importer of finished steel in the first half of the fiscal year as imports grew faster than domestic production, government data showed on Friday.

Indian drugmaker Torrent Pharmaceuticals reported a near 10% decline in second-quarter profit on Friday, as higher spending on research and development outpaced robust demand for chronic therapies in the country.

Infosys cut its annual revenue growth forecast on Friday as weakness in its key North American market deepened, underscoring how AI is disrupting the traditional IT services industry.

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