



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,913.70	-118.00	-0.49	-0.85	-8.54
BSE Sensex	76,009.70	-479.26	-0.63	-1.63	-10.77
Bank Nifty	55,092.90	-200.75	-0.36	0.39	-7.73
Nifty Midcap 100	62,298.90	332.30	0.54	3.56	2.55
Nifty Smallcap 100	18,267.20	64.5	0.35	0.74	3.18
S&P 500	7,519.12	45.65	0.61	4.00	9.63
DJIA	50,461.68	-118.02	-0.23	1.94	4.30
Nasdaq 100	30,001.32	519.68	1.76	8.27	19.02
Nikkei 225	64,996.09	-162.1	-0.25	9.21	25.40
Hang Seng	25,599.45	-6.58	-0.03	-1.90	-2.81
Shanghai Com	4,145.37	-7.20	-0.17	-0.36	3.03

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,913.70	55,092.90
Support	23,884 & 23,836	54,990 & 54,858
Resistance	24,041 & 24,089	55,407 & 55,547

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,127.02	15,534.89	-2,407.87
DII Cash Market	15,536.74	14,175.31	1,361.43

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Enterprise	2969.30	4.20	4899.49
TMPV	385.60	3.31	21346.89
Tech Mahindra	1458.70	1.62	1725.57
Nestle	1428.60	1.06	1472.82
Eternal	250.17	1.01	24447.43
Top Losers			
Apollo Hospital	8258.50	-1.73	310.58
Wipro	203.73	-1.50	46458.42
Bharti Airtel	1846.90	-1.49	5803.03
Trent	4239.60	-1.40	562.26
TCS	2276.20	-1.39	3587.60

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	99.62	3.62	63.98
WTI (USD/bbl)	93.84	-2.86	63.71
Gold Spot (USD/t oz.)	4,496.32	-1.62	3.79
USD/INR	95.69	-0.47	6.36
10 Year G-Sec India	6.994	-0.47	6.27
US 10 Year Bond	4.471	-0.31	7.29

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market benchmarks dipped on Tuesday due to further US strikes on Iran, lowering hopes for a peace settlement to end the three-month-long war that has disrupted prices and growth in Asia's third-largest economy. GIFT Nifty futures were at 23,890.5 as of 7:59 am, indicating the benchmark Nifty 50 would open near Tuesday's close of 23,913.7 points.

Global

The S&P 500 and Nasdaq hit record closing highs on Tuesday as AI-fueled optimism offset concerns over Middle East peace talks, which were compounded by recent US strikes on Iran.

Japan's Nikkei share average fell on Tuesday, retreating from a record high in the previous session, as investors locked in profits and rising oil prices weighed on sentiment.

Chinese stocks are trading mixed, as geopolitical tensions weigh against positive gains in domestic technology shares.

Commodities & Currency :

The Indian rupee slipped on Tuesday as crude oil prices rebounded on waning optimism about the chances of an imminent US-Iran peace deal.

Gold fell more than 1% on Tuesday, pressured by bets of higher US interest rates this year as renewed US military strikes on Iran dampened hopes for a peace deal, pushed up oil prices and revived inflation concerns.

News:

India's position as the fifth-largest global market by capitalisation is under threat as Taiwan closes in on the South Asian nation's spot, powered largely by the rapid rise of chip-making major Taiwan Semiconductor Manufacturing Co.

The foreign ministers of Australia, India, Japan and the U.S. agreed to jointly build a port in Fiji and signed pacts covering critical minerals and energy security, as they sought to inject fresh energy into their grouping known as the Quad.

India's Maruti Suzuki said on Tuesday it had introduced measures to curb the use of petroleum and reduce foreign currency spending, weeks after Prime Minister Narendra Modi urged citizens to adopt austerity steps amid a surge in energy prices.

India's KPI Green Energy plans to launch an infrastructure investment trust (InvIT) backed by renewable energy assets to raise up to \$1 billion, a top executive told Reuters.

State-run Coal India has asked its subsidiaries to ramp up coal supplies to power plants to avoid shortages as the country's power demand hits a record high following an intense heatwave, two sources with direct knowledge of the matter said.

Indian refiners' crude throughput fell 8.9% month-on-month in April to 5.23 million barrels per day (21.39 million metric tons), provisional government data showed.

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