AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 27th July 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	23,767.45	-102.15	-0.43	-0.99	-9.10
BSE Sensex	76,059.77	-331.62	-0.43	-1.12	-10.72
Bank Nifty	56,693.50	101.5	0.18	-2.31	-5.05
Nifty Midcap 100	61,622.35	-62.65	-0.10	-0.62	1.44
Nifty Smallcap 100	18,874.95	-61.40	-0.32	-0.30	6.61
S&P 500	7,411.98	3.68	0.05	-0.95	8.07
DJIA	51,947.25	235.6	0.46	-0.68	7.37
Nasdaq 100	28,128.34	-326.47	-1.15	-5.64	11.59
Nikkei 225	64,611.15	-1811.45	-2.73	-8.32	24.65
Hang Seng	24,963.23	-247.58	-0.98	8.28	-5.22
Shanghai Com	3,814.20	-62.58	-1.61	-7.25	-5.20

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,767.45	56,693.50
Support	23,550 & 23,500	56,100 & 56,000
Resistance	23,950 & 24,000	57,300 & 57,400

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,123.86	15,016.63	-3,892.77
DII Cash Market	18,959.43	13,505.88	5,453.55

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1271.00	2.11	3674.90
Wipro	177.12	1.32	13282.94
Cipla	1410.60	1.26	2917.79
ITC	283.45	0.76	24954.08
HDFC Life	555.05	0.74	1354.04
Top Losers			
Bajaj Finance	1012.80	-2.60	18416.96
Eternal	280.00	-2.47	37050.03
M&M	3161.40	-2.11	2135.69
Shriram Finance	1005.10	-2.02	11775.85
Tata Consumer	1088.00	-1.78	1644.92

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	96.78	-3.88	59.31
WTI (USD/bbl)	89.31	-3.12	55.81
Gold Spot (USD/t oz.)	4,052.79	0.08	-6.45
USD/INR	96.57	0.00	7.34
10 Year G-Sec India	6.83	-0.23	3.70
US 10 Year Bond	4.68	-0.34	12.24

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

Indian benchmark indices ended lower for the fifth consecutive session, although they recovered from intraday lows as Brent crude eased below $100 per barrel, with persistent concerns over elevated oil prices, escalating Middle East tensions and continued FII outflows keeping investor sentiment subdued.

Global

US equities closed mixed on Friday as investors balanced strong corporate earnings against rising concerns over energy-driven inflation and the prospect of a Federal Reserve rate hike, while higher oil prices and weakness in technology stocks limited broader market gains.

Japan's equity markets ended sharply lower on Friday, with the Nikkei 225 falling 2.73% and the Topix slipping 1.05%, as a selloff in technology stocks amid renewed concerns over heavy AI spending weighed on sentiment. Escalating Middle East tensions further dampened investor confidence by driving oil prices higher and fuelling inflation worries.

Chinese equities ended lower on Friday, with the Shanghai Composite declining 1.61% and the Shenzhen Component dropping 2.47%, as investor sentiment weakened following the announcement of fresh US tariffs. Washington imposed import duties of 10%–12.5% on major trading partners, including a 12.5% tariff on Chinese goods.

Commodities & Currency:

The Indian rupee weakened to around 96.57 per US dollar, hovering near record lows as a sharp rise in crude oil prices and fresh US tariff measures dampened investor sentiment and increased pressure on the currency.

Gold prices ended largely unchanged on Friday as investors weighed geopolitical tensions and higher oil prices against expectations that major central banks, including the Federal Reserve, are likely to keep interest rates elevated for longer.

News:

Indian banks and insurers will launch the CKYC 2.0 common customer identification system in August, enabling customers to access financial products without resubmitting identification documents, with asset managers set to join later.

SBI Cards and Payment Services' Q1 profit rose 19.5% to ₹6.64 billion, driven by improved asset quality as bad-loan provisions fell, while card spending increased 27% to ₹1.18 trillion.

India's private sector growth slowed to a more than four-year low in July, with the HSBC Flash Composite PMI falling to 54.3 from 57.1 in June, as a sharp slowdown in the services sector outweighed resilience in manufacturing.

Tata Consumer Products reported a 27.84% year-on-year rise in Q1 consolidated net profit to ₹4.27 billion, beating analysts' estimate of ₹4.20 billion, driven by double-digit volume growth in its India branded business.

Manipal Health Enterprises plans to invest ₹40 billion to add 2,400 beds, expanding its capacity by over 18% from 13,037 beds over the next three to four years, ahead of its IPO launch next week