

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,140.50	77.40	0.34	-3.80	-11.50
BSE Sensex	73,895.74	315.20	0.43	-3.96	-13.26
Bank Nifty	55,580.40	141.9	0.26	-3.19	-6.92
Nifty Midcap 100	60,906.00	-84.15	-0.14	-3.83	0.26
Nifty Smallcap 100	19,715.25	30.5	0.15	-0.86	11.35
S&P 500	7,743.41	39.28	0.51	1.47	13.12
DJIA	51,828.62	478.64	0.93	-1.78	7.83
Nasdaq 100	30,608.14	129.28	0.42	5.26	16.41
Nikkei 225	66,364.20	850.21	1.30	0.22	28.04
Hang Seng	24,510.09	-251.04	-1.01	-3.24	-6.94
ShanghaiCom	3,888.37	-48.15	-1.22	-2.30	-3.36

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,140.50	55,580.40
Support	23,053.90 & 23,020.45	55,423.71 & 55,331.94
Resistance	23,162.20 & 23,195.65	55,720.79 & 55,812.56

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,327.36	16,021.29	-3,693.93
DII Cash Market	14,035.77	11,197.60	2,838.17

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Axis Bank	1222.40	3.03	6923.16
Asian Paints	2444.00	2.14	426.98
M&M	3035.00	1.75	2080.30
Bajaj Fin	996.90	1.52	5467.79
HCL Tech	269.50	1.16	6241.14
Top Losers			
Max Healthcare	1014.00	-3.06	1900.72
TMPV	290.45	-1.54	22634.93
Infosys	1000.20	-1.41	10240.70
ONGC	235.86	-1.31	5066.49
Trent	2669.30	-1.14	1054.99

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	104.81	-1.68	72.53
WTI (USD/bbl)	92.41	-2.33	61.22
Gold Spot (USD/t oz.)	4,304.90	0.70	-0.63
USD/INR	95.82	0.15	6.51
10 Year G-Sec India	7.119	0.17	8.17
US 10 Year Bond	5.171	-0.52	24.09

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares posted modest gains on Friday in a partial rebound after previous session's slide, but still logged their longest weekly losing streak in six years as high oil prices drove up bond yields and inflationary concerns.

Global

Wall Street ended higher, lifted by Microsoft and other AI-related technology stocks, while high oil prices and a recent surge in US Treasury yields kept investors on edge.

Japans Nikkei 225 rose 1.3% to close at 66,364 , extending its gains to a fifth straight session. Stocks got support as oil prices fell and the recent global bond selloff eased.

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 closed modestly stronger on Friday, aided by an easing in oil prices and the dollar after a searing rally in both kept up the pressure on the local currency through the week, eliciting central bank interventions to avert sharp falls.

Gold prices edged higher on Friday but were headed for a weekly loss, as concerns about sticky inflation, hawkish signals from Federal Reserve policymakers, and higher US Treasury yields dented bullion's appeal.

News:

India has ordered more than 100 captive coal-fired power plants to operate at maximum capacity from October 1 through year-end to meet what it expects will be a rise in electricity demand.

India's markets regulator should reconsider allowing exchanges to list on their own platforms, NSE Chairman Srinivas Injeti said on Friday, a day after the bourse operator debuted on rival BSE at a valuation of about \$47 billion.

India is not planning to make major changes to how disputes with foreign businesses are resolved, according to a source with direct knowledge of the government's review of bilateral investment treaties. Indian automaker Tata Motors warned on Friday of prospects for a price hike as it braces for another hit to profit margins from a "significant" increase in commodity costs, though its bigger concern is how long the uncertainty will last.

Indian steel pipe maker Welspun Corp said on Friday that its US unit won a \$412.5 million pipe supply order, as investments in energy infrastructure and industrial activity boost demand.

India's Zee Entertainment has asked the Delhi High Court to initiate contempt proceedings against Reliance-Disney joint venture JioStar, alleging it continued to use copyrighted content despite a court injunction, a legal filing shows.

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