

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,780.25	-360.25	-1.56	-5.30	-12.87
BSE Sensex	72,771.72	-1124.02	-1.52	-5.42	-14.58
Bank Nifty	54,471.65	-1108.75	-1.99	-5.12	-8.78
Nifty Midcap 100	59,914.20	-991.80	-1.63	-5.40	-1.38
Nifty Smallcap 100	19,351.10	-364.15	-1.85	-2.69	9.30
S&P 500	7,683.69	-59.72	-0.77	0.68	12.90
DJIA	51,487.62	-347.01	-0.67	2.44	7.12
Nasdaq 100	30,276.81	-331.32	-1.08	4.13	21.43
Nikkei 225	65,877.62	-486.58	-0.73	-0.51	27.10
Hang Seng	24,642.51	132.42	0.54	-2.71	-6.44
ShanghaiCom	3,823.62	-64.75	-1.67	-3.93	-4.97

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,780.25	54,471.65
Support	22,753 & 22,678	54,403 & 54,178
Resistance	22,996 & 23,070	55,130 & 55,355

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,047.56	14,400.78	-5,353.22
DII Cash Market	15,918.32	10,729.30	5,189.02

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Dr Reddys Labs	1221.00	1.67	3401.68
Infosys	1003.20	0.30	8567.67
HDFC Life	531.60	0.11	2307.14
Top Losers			
TMPV	281.75	-3.00	14063.13
Adani Enterprise	2831.10	-2.93	1259.53
Jio Financial	220.50	-2.86	17931.55
Power Grid Corp	261.85	-2.84	10278.46
L & T	3766.40	-2.83	1361.60

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	104.97	2.38	75.80
WTI (USD/bbl)	94.74	2.52	65.28
Gold Spot (USD/t oz.)	4,151.61	-3.11	-4.17
USD/INR	95.99	-0.17	6.69
10 Year G-Sec India	7.18	0.93	9.16
US 10 Year Bond	5.251	0.11	25.05

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, Indian shares plummeted to near six-month lows, extending a seven-week losing trend. Oil prices increased after US-Iran peace talks ended in deadlock.

Global

US stocks fell as oil prices and Treasury yields increased, with investors weighing uncertainty over the prospects for an Iran war peace deal and the impact on the Federal Reserve's rate path.

The Nikkei 225 fell 0.73% to close at 65,878, ending a five-session winning streak after giving up earlier gains. The decline came as oil prices jumped after President Donald Trump rejected Iran's latest proposal to reopen the Strait of Hormuz.

Chinese stocks came under pressure, with the Shanghai Composite falling 1.67% to 3,823.6, its lowest level in nearly two months. The Shenzhen Component dropped 3.44% to 12,858.8, hitting a more than nine-month low.

Commodities & Currency:

The Indian rupee slipped to its weakest in more than a week as oil prices marched higher, dragging down regional stocks and currencies as investors fretted over the impact of high energy prices and geopolitical uncertainty.

Gold fell more than 3% to touch its lowest in over seven weeks, as higher oil prices stoked inflation fears, bolstering the case for elevated interest rates.

News:

India's industrial output grew at a stronger-than-expected pace of 8% in August, government data showed on Monday, boosted by a surge in manufacturing and electricity output even as mining output contracted.

The Reserve Bank of India is expected to raise interest rates by 25 basis points to 5.50% in October, the first increase since 2023, with one more hike likely in December, a majority of economists polled by Reuters said, as inflation picks up.

Indian refiners expect Russian oil supplies to further tighten in October and November due to reduced exports and stiff competition from China, forcing the world's third-largest crude importer to buy more costly alternatives for the rest of the year, four trade sources said.

India's Supreme Court questioned why the government wanted to "waste so much time" on fresh public and industry consultations before adopting warning labels on packaged items, in its latest push for swifter action on food labelling.

Austrian beverage maker Red Bull has sued India's food regulator for prohibiting the use of the "energy drink" descriptor without issuing any warning notice, which it claims is impacting its investments in India, its court filing showed.

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