

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,716.20	-64.05	-0.28	-5.57	-13.12
BSE Sensex	72,529.07	-242.65	-0.33	-5.74	-14.86
Bank Nifty	54,259.95	-211.7	-0.39	-5.49	-9.13
Nifty Midcap 100	59,319.40	-594.80	-0.99	-6.34	-2.36
Nifty Smallcap 100	19,193.55	-157.55	-0.81	-3.48	8.41
S&P 500	7,670.84	-12.85	-0.17	0.51	12.03
DJIA	51,355.13	-132.03	-0.26	-2.18	6.41
Nasdaq 100	30,339.33	62.52	0.21	4.34	20.12
Nikkei 225	65,481.27	-396.35	-0.60	-1.11	26.33
Hang Seng	24,523.57	-118.94	-0.48	-3.18	-6.89
ShanghaiCom	3,830.45	6.83	0.18	-3.75	-4.80

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,716.20	54,259.95
Support	22,609 & 22,566	53,913 & 53,767
Resistance	22,749 & 22,793	54,387 & 54,533

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	22,472.70	32,452.92	-9,980.22
DII Cash Market	46,261.11	39,308.40	6,952.71

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Enterprise	2972.90	5.01	4062.23
Adani Ports	1822.00	4.49	4214.20
Dr Reddys Labs	1251.90	2.53	5347.13
Sun Pharma	1865.00	1.47	3083.08
Infosys	1015.40	1.22	12992.71
Top Losers			
Titan Company	4675.00	-3.00	1188.41
Wipro	156.79	-2.95	164453.79
HCL Tech	1222.00	-2.44	5604.93
Apollo Hospital	8659.00	-2.27	609.21
Tech Mahindra	1510.50	-2.06	3218.35

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	103.55	-1.64	70.45
WTI (USD/bbl)	90.67	-2.05	58.18
Gold Spot (USD/t oz.)	4,153.89	0.93	-4.12
USD/INR	95.99	0.00	6.69
10 Year G-Sec India	7.16	-0.31	8.83
US 10 Year Bond	5.23	-0.53	25.05

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, Indian share benchmarks fell further due to the absence of a Middle East peace settlement, which increased oil prices and bond yields, raising concerns about foreign investor outflows.

Global

US stocks ended the session slightly lower, as government bond yields continued their ascent ahead of inflation and labor market data, while investors assessed comments from Federal Reserve officials for the path of interest rates.

Japanese stocks fell for a second straight session. The Nikkei 225 dropped 0.6% to 65,481. Global bond yields remained elevated as investors worried that higher energy prices could keep inflation strong and lead to tighter monetary policy.

Chinas stock markets closed slightly higher on Tuesday, helped by growing expectations of more government support for the economy. The Shanghai Composite rose 0.18% to 3,830.5, while the Shenzhen Component gained 0.34% to 12,902.

Commodities & Currency:

The Indian rupee closed nearly unchanged on Tuesday after hitting a two-month low earlier in the session as crude oil prices continued to dictate the currency's momentum while likely central bank intervention limited weakness.

Gold prices edged higher after hitting a more-than-seven-week low in the previous session, as investors watch for US economic data that could offer clues on the Federal Reserve's interest rate outlook.

News:

India's new steel policy plans 600 million metric tons of steelmaking capacity by 2047 and is a roadmap for the next two decades, the country's steel secretary said on Tuesday, adding that it will be released to the public domain soon.

India's Sun Pharmaceutical Industries is planning to raise around 100 billion rupees (\$1.04 billion) via a rupee-denominated debt sale to partly fund a bridge loan it took to acquire US healthcare firm Organon & Co., three sources said on Tuesday.

An Indian court on Tuesday quashed the food regulator's order to stop Austrian beverage firm Red Bull using the label "energy drink" on its cans, saying the decision had been taken without allowing the company to explain its position.

India's market regulator on Monday allowed Adani Group Chairman Gautam Adani and four group companies to settle proceedings on alleged regulatory lapses related to a 25% minimum public shareholding requirement.

India's trade minister will hold talks with his counterparts in the United States over the next week to advance a proposed deal between the two countries and finalise an interim agreement, the government said.

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