



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,178.65	-317.90	-1.25	1.42	-3.70
BSE Sensex	81,287.19	-961.42	-1.17	0.70	-4.58
Bank Nifty	60,529.00	-658.70	-1.08	3.62	1.37
Nifty Midcap 100	59,115.60	-682.55	-1.14	3.49	-2.69
Nifty Smallcap 100	16,928.90	-188.75	-1.10	3.11	-4.38
S&P 500	6,878.88	-29.98	-0.43	-0.97	0.30
DJIA	48,977.92	-521.28	-1.05	0.19	1.23
Nasdaq 100	24,960.04	-74.33	-0.30	-2.74	-0.98
Nikkei 225	58,850.27	96.88	0.16	11.77	13.54
Hang Seng	26,630.54	249.52	0.95	-0.54	1.11
Shanghai Com	4,147.23	29.82	0.72	3.27	3.08

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,178.65	60,529.00
Support	25,054 & 24,930	60,438 & 60,396
Resistance	25,389 & 25,600	60,604 & 60,667

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	36,699.66	44,236.02	-7,536.36
DII Cash Market	24,867.72	12,574.91	12,292.81

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1389.10	1.14	8651.44
Trent	3899.50	1.13	976.50
Infosys	1300.10	0.85	23141.72
Apollo Hospital	7821.50	0.60	698.13
NTPC	381.90	0.00	11548.96
Top Losers			
Sun Pharma	1737.00	-2.73	3041.49
Bharti Airtel	1879.30	-2.61	13754.65
HDFC Life	715.30	-2.55	3416.01
M&M	3397.40	-2.50	3765.50
Dr Reddys Labs	1286.30	-2.50	3510.40

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	72.62	2.64	19.54
WTI (USD/bbl)	67.32	3.01	17.20
Gold Spot (USD/t oz.)	5,213.28	0.55	20.34
USD/INR	90.98	-0.07	1.12
10 Year G-Sec India	6.660	-0.51	1.19
US 10 Year Bond	3.974	0.91	-4.64

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities slumped on Friday, driven by financials, with benchmark indices down for the third month in a row, while IT firms had their worst month since September 2008 on fears that artificial intelligence will erode their profitability. The Gift Nifty futures were trading at 25,132 points, as of 6:50 am, indicating the benchmark Nifty 50 will open below Friday's close of 25,178.65.

Global

All three major indexes ended decisively lower and posted steep weekly declines, with the blue-chip Dow logging its biggest weekly drop since mid-November.

Japan's main stock index, the Nikkei 225, has been climbing sharply and hit record highs this week, fueled by strong investor sentiment and optimism around technology stocks.

Hong Kong stocks closed out February with the worst monthly decline since October as jitters about artificial intelligence's potential disruption to traditional industries put investors on tenterhooks.

Commodities & Currency :

The Indian rupee strengthened in February to log its first monthly rise since April 2025 as a pick-up in foreign portfolio inflows and the announcement of a US trade deal eased pressure on the emerging market laggard.

Gold rose to near a one-month high on Friday and was headed for a seventh straight month of gains, supported by geopolitical tensions after the United States and Iran extended nuclear talks, while softer US Treasury yields further boosted bullion.

News:

India's economic growth slowed in the October-December quarter as government spending and private investment eased, but the South Asian nation remained the world's fastest growing major economy, helped by strong consumption.

India, the world's second-largest importer of thermal coal, wants to cut those imports for power plants by at least 30%, asking them to test increased blending with domestic coal, government and industry officials familiar with the plan said.

India's fiscal deficit in April-January was 9.8 trillion rupees (\$107.69 billion) or 63% of the estimate for the financial year ending March 31, government data showed on Friday.

India wants to secure the best trade deal with the US to ensure it has an edge over competitors, India's trade minister said on Friday, as the fate of deals finalised by Washington remain uncertain after President Donald Trump's tariffs were invalidated.

Canadian Prime Minister Mark Carney arrives in Mumbai on Friday on his first official visit to India, hoping to reset the sometimes fractious relationship with the world's most populous country as he seeks new global alliances.

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