



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,175.70	169.85	0.71	0.71	-7.54
BSE Sensex	77,502.12	579.48	0.75	0.75	-9.02
Bank Nifty	58,031.65	-1.40	0.00	0.00	-2.81
Nifty Midcap 100	62,307.90	299.10	0.48	0.48	2.56
Nifty Smallcap 100	19,167.80	236.75	1.25	1.25	8.26
S&P 500	7,483.25	0.03	0.00	0.00	9.11
DJIA	52,905.28	595.06	1.14	0.00	8.11
Nasdaq 100	29,329.21	-479.92	-1.61	0.00	18.26
Nikkei 225	68,733.15	-1741.81	-2.47	-2.47	32.61
Hang Seng	23,055.03	174.01	0.76	0.00	-12.47
ShanghaiCom	4,028.90	-83.54	-2.03	-2.03	0.14

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,175.70	58,031.65
Support	24,091 & 24,059	57,909 & 57,788
Resistance	24,195 & 24,227	58,299 & 58,420

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,018.40	14,330.22	-311.82.10
DII Cash Market	17,391.61	15,607.21	1,784.40

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Infosys	1040.90	5.64	18741.11
Tech Mahindra	1421.30	4.34	3034.63
TCS	2068.10	4.31	6040.62
HCL Tech	1078.10	4.24	3726.61
Bajaj Finserv	1855.70	3.23	1786.88
Top Losers			
Max Healthcare	1127.40	-1.10	1053.69
L & T	4059.40	-0.81	2481.55
TMPV	345.95	-0.53	10423.98
Nestle	1446.20	-0.52	1434.14
Axis Bank	1362.60	-0.45	4013.56

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	71.60	0.04	17.86
WTI (USD/bbl)	68.51	-0.10	19.52
Gold Spot (USD/t oz.)	4,118.48	2.18	-4.94
USD/INR	95.40	-0.16	6.03
10 Year G-Sec India	6.72	-0.56	2.07
US 10 Year Bond	4.46	-0.33	4.93

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Thursday, Indian shares outperformed broader Asia due to reduced oil prices and a recovery in information technology equities, which protected the market from a global selloff of AI stocks. GIFT Nifty futures were at 24,414, as of 7:44 am, indicating the Nifty 50 could open above Thursday's close of 24,175.7.

Global

The Nasdaq ended lower on Thursday (July 2) as technology shares fell, while a softer-than-expected US jobs report eased worries that the Federal Reserve could feel impelled to hike interest rates soon.

Japan's Nikkei index fell, dragged lower by AI-related heavyweights following an overnight tech selloff on Wall Street. The Nikkei 225 index dropped 2.5% to 68,733.15 points.

Chinese stocks fell to a three-week low, dragged down by a sharp selloff in chipmakers. Hong Kong shares rebounded on a recovery in internet heavyweights.

Commodities & Currency :

The Indian rupee declined for the fourth consecutive session against the dollar on Thursday as market flows related to arbitrage trades and merchant payments pinched the currency despite weakness in the dollar and likely market intervention.

Gold rose more than 2% on Thursday, extending gains after weaker-than-expected U.S. non-farm payrolls data reduced expectations of Federal Reserve interest rate hikes this year.

News:

India and Japan agreed on Thursday to boost cooperation in artificial intelligence, metals, energy and defence as well as prepare a joint roadmap for economic security, as the Asian nations sought to further strengthen their ties.

India has asked WhatsApp to justify the implementation of a planned feature covering usernames and to freeze the rollout in its biggest market, escalating a crackdown on messaging anonymity that began with Telegram, according to a government letter reviewed by Reuters.

Russia has started seaborne imports of gasoline from India, two industry sources said on Wednesday, in an effort to mitigate fuel shortages triggered by Ukrainian attacks on its energy infrastructure.

Indian space startup Skyroot Aerospace said on Thursday it was preparing for the launch of its Vikram-1 rocket, the first attempt by an Indian private company to place a satellite in orbit.

Abu Dhabi's International Holding Company plans to invest \$11.5 billion in an integrated aluminium project in the eastern Indian state of Odisha through a joint venture with India's Adani Group, a state official said, in what would be the country's largest foreign investment in the metals sector.

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