

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,119.30	121.75	0.51	0.00	-7.75
BSE Sensex	77,269.40	355.9	0.46	0.00	-9.30
Bank Nifty	54,878.50	15.15	0.03	0.00	-8.09
Nifty Midcap 100	60,159.75	374.90	0.63	0.00	-0.97
Nifty Smallcap 100	18,132.50	125.35	0.70	0.00	2.42
S&P 500	7,200.76	-29.35	-0.41	0.00	5.42
DJIA	48,941.90	-557.37	-1.13	0.00	2.31
Nasdaq 100	27,651.82	-58.54	-0.21	0.00	9.93
Nikkei 225	59,513.12	228.2	0.38	0.00	14.82
Hang Seng	26,095.88	319.35	1.24	0.00	-0.92
Shanghai Com	4,112.16	4.65	0.11	0.00	2.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,119.30	54,878.50
Support	24,029 & 23,962	54,732 & 54,525
Resistance	24,247 & 24,314	55,404 & 55,611

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	19,660.47	16,824.85	2,835.62
DII Cash Market	19,516.11	14,751.95	4,764.16

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Adani Ports	1742.60	5.15	7171.35
Adani Enterprise	2485.70	3.21	6039.54
Eicher Motors	7329.00	3.09	684.36
HUL	2309.30	2.59	2554.26
Jio Financial	252.74	2.59	17828.74
<b>Top Losers</b>			
Bharti Airtel	1827.10	-3.16	10707.86
Kotak Mahindra	371.65	-3.04	74467.48
Dr Reddys Labs	1287.20	-2.70	2285.51
ONGC	292.90	-2.22	15468.44
TCS	2431.30	-1.72	2632.36

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	114.54	5.89	88.54
WTI (USD/bbl)	105.95	3.93	84.84
Gold Spot (USD/t oz.)	4,512.39	-2.21	4.16
USD/INR	95.09	-0.18	5.69
10 Year G-Sec India	7.019	0.06	6.65
US 10 Year Bond	4.441	-0.18	4.87

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Monday, Indian market indexes increased because to lower oil prices, positive automobile sales statistics and state election results. However, declines in technology companies and Kotak Mahindra Bank limited the gains.

#### Global

Wall Street ended lower on Monday, with the S&P 500 retreating from record highs, after a South Korean ship was hit by an explosion in the Strait of Hormuz and Tehran demonstrated its grip on Middle East oil, dampening optimism about strong first-quarter earnings reports.

### Commodities & Currency :

The Indian rupee slipped to its weakest closing level on record on Monday, pressured by heightened dollar demand from maturing non-deliverable forward positions and an uptick in oil prices.

Gold prices fell 2% on Monday as heightened US-Iran tensions boosted the dollar and reinforced inflation concerns that kept expectations of higher interest rates alive.

### News:

Indian Prime Minister Narendra Modi's party was set on Monday to record substantial victories in state elections, an outcome that could accelerate its landmark policies like uniform civil laws and infrastructure building, political leaders and analysts said.

India's manufacturing growth edged up slightly in April but remained stuck near a four-year low as weak demand and soaring input costs driven by the Middle East war weighed on activity, a survey showed.

Indian traders have begun exporting wheat for the first time in four years, as ample stocks, higher global prices and firmer freight rates have opened a window for them to make small shipments to buyers in Asia and the Middle East, trade sources said.

India's liquefied petroleum gas consumption in April fell by 16.2% to 2.2 million metric tons, preliminary government data show, as supplies were hit by the closure of the Strait of Hormuz after Israel and the U.S. attacked Iran.

India's Ambuja Cements reported a nearly threefold jump in its fourth-quarter profit on Monday, helped by tax gains and record cement sales volumes.

India's Exide Industries reported a 22.7% rise in fourth-quarter profit, as buoyant automotive demand and the continued tailwind from India's tax cuts last September boosted demand for its batteries.

India has no plans to compensate state-run fuel retailers for losses from selling transport fuels below market prices, a senior petroleum ministry official said on Monday, even as companies raised prices for some industrial and bulk customers.

India's electricity generation in April rose to 167.61 billion kilowatt-hours, the highest since May 2024, and is set to increase further as intense heat leads to record peaks in demand, a Reuter's analysis of daily government data showed.

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