



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,270.85	95.15	0.39	1.10	-7.17
BSE Sensex	77,763.91	261.79	0.34	1.09	-8.72
Bank Nifty	57,938.50	-93.15	-0.16	-0.16	-2.97
Nifty Midcap 100	62,190.30	-117.60	-0.19	0.29	2.37
Nifty Smallcap 100	19,175.10	7.30	0.04	1.29	8.30
S&P 500	7,483.24	NA	NA	0.00	9.11
DJIA	52,900.07	NA	NA	1.14	9.34
Nasdaq 100	29,329.21	NA	NA	-1.61	16.36
Nikkei 225	69,744.07	1010.92	1.47	-1.04	34.56
Hang Seng	23,350.03	295.00	1.28	1.28	-11.35
ShanghaiCom	4,043.64	14.74	0.37	-1.67	0.50

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,270.85	57,938.50
Support	24,252 & 24,222	57,819 & 57,690
Resistance	24,348 & 24,378	58,234 & 58,363

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,337.33	11,982.00	1,355.33
DII Cash Market	18,676.35	20,630.24	-1,953.89

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1139.00	5.65	12768.46
Max Healthcare	1153.40	2.31	1456.46
Apollo Hospital	8893.50	2.27	377.55
Bajaj Finserv	1895.60	2.15	2036.83
Dr Reddys Labs	1374.10	2.11	1296.17
Top Losers			
Axis Bank	1342.10	-1.50	3500.47
M&M	3136.90	-1.21	2414.99
SBI	1040.00	-1.10	10441.49
L&T	4026.60	-0.81	1505.43
Tech Mahindra	1410.10	-0.79	2849.87

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	72.12	0.45	18.72
WTI (USD/bbl)	68.69	0.13	19.84
Gold Spot (USD/t oz.)	4,176.94	1.32	-3.59
USD/INR	95.22	0.18	5.84
10 Year G-Sec India	6.71	-0.10	1.96
US 10 Year Bond	4.48	NA	7.59

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Friday, Indian equities surged for the fourth week in a row, as a softer-than-expected US jobs data and decreasing oil prices soothed concerns about future Federal Reserve rate hikes.

Global

US stock market was closed on Friday, July 3, in observance of the Independence Day holiday.

Japan's Nikkei stock index rose on Friday, marking a weekly gain, as a reduction in rate rise predictions in the United States and favorable economic data at home lifted mood.

China stocks bounced back on Friday following a previous decline in chipmakers, while Hong Kong stocks continued to rise. The rebound was influenced by a US jobs report suggesting that the Federal Reserve would maintain an accommodative monetary policy, bolstering investor confidence.

Commodities & Currency :

The Indian rupee closed modestly higher on Friday but logged a weekly fall as dollar demand related to merchant flows, arbitrage trades and maturities in the non-deliverable forward market outweighed comfort from a broadly weaker US dollar.

Gold demand in India eased on Friday after a modest pick-up earlier in the week, as prices rebounded from a three-month low, while buying interest in China improved slightly.

News:

India's southern state of Kerala was not consulted on MSC Group's planned \$1.4 billion investment in the Vizhinjam port in partnership with Adani Ports and Special Economic Zone, the state's chief minister said.

India's Adani Enterprises increased the size of its qualified institutional placement by 50% to 150 billion rupees (\$1.75 billion) after attracting bids worth about 380 billion rupees, or 3.8 times the base offer, two sources told Reuters.

Godrej Consumer said on Friday it expects consolidated revenue to rise in the quarter ended June 30, driven by high-single-digit underlying volume growth.

Dabur India expects a rise in first-quarter profit after tax, the firm said on Friday, as price increases helped cushion the impact of elevated inflation and supported operating margins.

India's dominant services sector expanded at its slowest pace in 17 months in June as domestic demand weakened sharply and overall new business grew at its slowest rate in over two-and-a-half years, according to a survey that also showed hiring nearly stalling.

India's coal-fired power generation surged to a near-three-year high in June because of increased cooling demand from higher temperatures from an extended heatwave and below-average monsoon rainfall, government data showed.

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