

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,123.65	155.4	0.68	1.96	-11.56
BSE Sensex	74,616.58	509.73	0.69	2.03	-12.41
Bank Nifty	52,716.25	107.15	0.20	2.46	-11.72
Nifty Midcap 100	54,600.55	107.90	0.20	1.45	-10.12
Nifty Smallcap 100	15,843.30	-9.75	-0.06	0.85	-10.51
S&P 500	6,616.85	5.02	0.08	0.63	-3.52
DJIA	46,584.46	-85.42	-0.18	0.04	-3.72
Nasdaq 100	24,202.37	10.2	0.04	0.76	-3.98
Nikkei 225	53,429.56	15.88	0.03	-0.58	3.08
Hang Seng	25,116.53	NA	NA	-0.70	-4.64
Shanghai Com	3,880.10	NA	NA	-1.73	-3.56

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,123.65	52,716.25
Support	22,833 & 22,730	52,107 & 51,892
Resistance	23,165 & 23,267	52,802 & 53,016

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	7,953.46	16,645.57	-8,692.11
DII Cash Market	20,860.09	12,880.59	7,979.50

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Wipro	204.72	3.77	24771.47
Hindalco	954.50	2.92	11877.73
HCL Tech	1441.60	2.73	3459.05
TCS	2539.80	2.66	4516.55
Infosys	1339.40	2.54	15355.79
Top Losers			
Dr Reddys Labs	1196.10	-1.78	2330.51
Adani Enterprise	1882.10	-1.06	1566.91
Interglobe Avi	4268.80	-1.01	1488.16
Apollo Hospital	7326.50	-0.63	311.56
M&M	3006.60	-0.50	2292.72

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	110.07	0.00	80.69
WTI (USD/bbl)	114.43	1.80	99.60
Gold Spot (USD/t oz.)	4,659.89	0.22	7.56
USD/INR	93.00	0.07	3.37
10 Year G-Sec India	7.046	0.00	7.05
US 10 Year Bond	4.248	-1.06	1.94

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities climbed on Tuesday, powered by increases in information technology sectors ahead of quarterly earnings. However, investors remained cautious due to concerns over an escalation in the Middle East war and US President Donald Trump's deadline for Iran to reach a deal. Indian shares set to open higher on Iran ceasefire. GIFT Nifty futures were trading at 23,825 as of 7:49 am, indicating that the benchmark Nifty 50 will open about 3% above Tuesday's close of 23,123.65.

Global

US stocks ended mixed on Tuesday amid signs of progress in negotiations as the minutes ticked down to President Donald Trump's deadline for Iran to open the Strait of Hormuz.

Japan's stock market remained cautious and largely stable, with limited movement in the Nikkei 225 as investors avoided taking major positions.

Commodities & Currency :

The Indian rupee closed stronger on Tuesday, supported by the unwinding of residual arbitrage positions, while traders braced for a US deadline to reach a deal with Iran and the Reserve Bank of India's monetary policy decision.

Gold prices drifted higher on Tuesday, with market attention on US President Donald Trump's looming deadline for Iran to reopen the Strait of Hormuz or risk devastating attacks on its infrastructure.

News:

Air India said on Tuesday that CEO Campbell Wilson had resigned after nearly four years in the role, as the carrier grapples with persistent losses and heightened regulatory scrutiny following a crash last year that killed 260 people.

India plans to roll out sovereign credit guarantees on loans worth \$26.7 billion, aimed at supporting businesses, particularly small firms, affected by the Middle East crisis, two government sources said.

India is expected to receive below-normal monsoon rainfall in 2026, private weather forecaster Skymet said on Tuesday, as the El Nino weather pattern is set to reduce precipitation in the second half of the June–September rainy season.

Consumption of sugar and edible oils in India, the world's largest market, is declining as a shortage of commercial gas cylinders has forced restaurants to scale back operations during the summer holiday season.

Record foreign outflows from India's financial stocks in March underscored a deepening retreat by overseas investors, as fears over fallout from the Iran war on economic growth and earnings compounded pressure on Indian equities and the rupee.

India has granted a one-off extension for public offers that are being deferred due to the Middle East war that is now in its sixth week, according to a statement by the markets regulator.

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