AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

10th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,570.65	**-65.35**	**-0.27**	**-0.82**	**-6.03**
BSE Sensex	78,499.17	**-455.59**	**-0.58**	**-0.18**	**-7.85**
Bank Nifty	57,746.45	**-317.20**	**-0.55**	**-0.86**	**-3.29**
Nifty Midcap 100	63,463.55	**136.75**	**0.22**	**-0.34**	**4.47**
Nifty Smallcap 100	19,867.80	**-10.45**	**-0.05**	**1.42**	**12.22**
S&P 500	7,757.64	**47.68**	**0.62**	**2.07**	**13.11**
DJIA	54,036.93	**151.83**	**0.28**	**1.61**	**11.69**
Nasdaq 100	29,722.30	**348.97**	**1.19**	**3.29**	**17.92**
Nikkei 225	65,606.71	**-76.55**	**-0.12**	**2.90**	**26.57**
Hang Seng	25,668.03	**137.75**	**0.54**	**-1.31**	**-2.55**
ShanghaiCom	3,940.04	**39.69**	**1.02**	**3.42**	**-2.07**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,570.65	57,746.45
Support	24,531 & 24,489	57,528 & 57,415
Resistance	24,669 & 24,711	57,891 & 58,003

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,941.31	12,461.07	**480.24**
DII Cash Market	15,679.58	15,444.02	**235.56**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TCS	2452.70	**3.36**	4547.98
Grasim	3323.00	**3.20**	1071.22
Hindalco	1059.60	**3.17**	9284.75
M&M	3502.00	**2.82**	3299.24
HCL Tech	1356.60	**1.62**	1725.62
Top Losers			
Bajaj Finance	1078.00	**-5.84**	15614.00
Bajaj Finserv	2008.90	**-3.70**	2416.62
Trent	2997.00	**-3.54**	2469.17
ICICI Bank	1421.00	**-2.50**	14395.79
Jio Financial	256.80	**-2.39**	10858.22

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	83.55	**1.29**	**37.53**
WTI (USD/bbl)	78.18	**1.15**	**36.39**
Gold Spot (USD/t oz.)	4,341.56	**2.41**	**0.21**
USD/INR	95.21	**0.01**	**5.83**
10 Year G-Sec India	6.77	**-0.03**	**2.78**
US 10 Year Bond	4.65	**-0.69**	**11.48**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dropped on Friday, reducing weekly gains due to heavyweight financials and rising oil prices. Investors stayed cautious ahead of US monthly jobs data due later, which could shape expectations for future Federal Reserve rate moves.

Global

US stocks advanced, with the S&P closing at a record high to cap off a strong week of gains for the major indexes, after data showed the US economy unexpectedly shed jobs last month and dampened expectations the Federal Reserve would raise interest rates at its September meeting

Japanese equities ended marginally lower, with the Nikkei 225 declining 0.12% to close at 65,607, extending losses for a second consecutive session. Weakness in technology stocks continued as investor concerns over AI-related valuations weighed on sentiment.

Chinese equity markets ended higher, with the Shanghai Composite rising 1.02% to 3,940 and the Shenzhen Component gaining 1.42% to 14,311, as both indices touched their highest levels in three weeks.

Commodities & Currency:

The Indian rupee ended little changed and firmed modestly week-on-week as central bank intervention blunted pressure from higher oil prices, which added to traders' caution heading into a key US labour market report.

Gold surged, hitting its highest in seven weeks, after an unexpected drop in US nonfarm payrolls for July dashed rate-hike hopes and set bullion on course for its best week in seven months.

News:

India is preparing a production-linked incentive scheme to encourage domestic polysilicon manufacturing, the country's top clean energy ministry official said on Friday.

India's Trent fell as much as 3.06% on Friday, as investors looked beyond the fashion retailer's first-quarter profit beat and remained focused on the pace of revenue growth.

India's Reliance Industries has paid a record $23 million to $25 million to charter a supertanker to lift Iraqi crude, pointing to a limited pool of ships available in the Gulf and the soaring costs of every voyage, three shipping sources said.

Two Indian private sector lenders have tapped US dollar denominated debt market for the second time in less than two months, to raise $300 million each, two merchant bankers said.

India's Hindalco Industries posted a sharp rise in first-quarter profit on Friday, boosted by higher aluminium prices and a production ramp-up, and expects costs to have peaked in the ongoing quarter.

Indian consumer inflation likely rose in July, notching a second consecutive month above the RBI's 4% medium-term target, as food prices edged higher, a Reuters poll showed.