

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,867.30	173.60	0.68	4.20	-1.07
BSE Sensex	84,065.75	485.35	0.58	4.14	-1.32
Bank Nifty	60,669.35	548.80	0.91	3.86	1.60
Nifty Midcap 100	60,441.15	938.45	1.58	5.81	-0.51
Nifty Smallcap 100	17,385.90	447.25	2.64	5.89	-1.80
S&P 500	6,964.82	32.52	0.47	-0.17	1.55
DJIA	50,135.87	20.20	0.04	1.47	3.62
Nasdaq 100	25,268.14	192.37	0.77	-1.83	0.25
Nikkei 225	56,363.94	2110.26	3.89	7.04	8.74
Hang Seng	27,027.16	467.21	1.76	0.94	2.61
Shanghai Com	4,123.09	57.51	1.41	2.67	2.48

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,867.30	60,669.35
Support	25,750 & 25,570	60,340 & 59,900
Resistance	25,970 & 26,180	60,890 & 61,200

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,066.13	13,811.49	2,254.64
DII Cash Market	13,572.99	13,568.84	4.15

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
SBI	1146.00	7.46	40852.97
Shriram Finance	1062.70	6.00	8667.62
Grasim	2926.30	3.15	681.77
Titan Company	4257.80	2.82	1092.39
Dr Reddys Labs	1275.50	2.76	2111.32
Top Losers			
Max Healthcare	1010.00	-2.87	3235.02
Power Grid Corp	289.75	-1.02	13114.58
ITC	322.80	-0.92	20059.20
ONGC	266.60	-0.87	10824.04
NTPC	361.90	-0.86	7983.24

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.01	1.62	13.83
WTI (USD/bbl)	64.35	1.48	12.51
Gold Spot (USD/t oz.)	5,066.50	2.06	16.95
USD/INR	90.77	-0.11	0.89
10 Year G-Sec India	6.756	0.30	2.64
US 10 Year Bond	4.190	-0.28	0.56

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian stocks climbed on Monday after an interim framework for a trade deal with the United States and excellent profits from the country's largest lender, State Bank of India, boosted mood, with favourable global cues adding to the rally.

Global

The S&P 500 and the Nasdaq gained after a shaky start on Monday, as technology stocks found their footing following last week's AI-sparked selloff, while investors waited for key economic data that could shed light on the Federal Reserve's interest-rate path.

Japanese stocks rallied to fresh record highs on Monday after a resounding win by Prime Minister Sanae Takaichi's ruling party, and the yen edged away from the danger zone for intervention.

Hong Kong stocks rose alongside other markets in Asia, as sentiment towards global risk assets stabilised and the victory of Japan's ruling party in the parliamentary election boosted risk appetite.

Commodities & Currency :

The Indian rupee closed a tad weaker on Monday, unable to benefit from a broadly weaker dollar in the face of corporate demand for the greenback over a trading session that was also marked by technical glitches.

Gold prices rose on Monday, buoyed by a softer dollar as investors braced for a week packed with US economic data that could offer more clues on the US Federal Reserve's monetary policy.

News:

India's annual consumer inflation rate likely rose for a third consecutive month to 2.4% in January, according to a Reuters poll of economists, as firming food prices and higher gold and silver coincided with fading favourable base effects.

State Bank of India jumped 7.5% to close at a record high on Monday after the nation's largest lender beat quarterly profit estimates and raised its full-year loan growth outlook, prompting at least 15 brokerages to lift their price targets.

India's Gujarat state said on Monday that it had signed a letter of intent with Elon Musk's Starlink to provide high-speed, satellite-based internet connectivity across remote and underserved regions of the western state.

Indian drugmaker Zydus Lifesciences Ltd reported a third-quarter profit above estimates on Monday, underpinned by new drug launches in North America, its biggest market.

India's steel exports will continue to be impacted by the European Union's carbon tax and import quotas, and the government will take steps to help the sector, the federal steel secretary said.

Adani Energy Solutions has secured long-term financing from a consortium of Japanese banks, led by MUFG and SMBC for a renewable power transmission project in northern India, it said on Monday.

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