

| Indices | Closing Level | Change | | Performance | |
|--------------------|---------------|---------|-------|-------------|---------|
| | | Value | (%) | MTD (%) | YTD (%) |
| Global | | | | | |
| Nifty 50 | 25,935.15 | 67.85 | 0.26 | 4.47 | -0.81 |
| BSE Sensex | 84,273.92 | 208.17 | 0.25 | 4.40 | -1.07 |
| Bank Nifty | 60,626.40 | -42.95 | -0.07 | 3.78 | 1.53 |
| Nifty Midcap 100 | 60,735.90 | 294.75 | 0.49 | 6.33 | -0.02 |
| Nifty Smallcap 100 | 17,451.20 | 65.30 | 0.38 | 6.29 | -1.43 |
| S&P 500 | 6,941.82 | -22.99 | -0.33 | -0.17 | 1.55 |
| DJIA | 50,188.14 | 52.27 | 0.10 | 1.47 | 3.62 |
| Nasdaq 100 | 25,127.64 | -140.50 | -0.56 | -1.83 | 0.25 |
| Nikkei 225 | 57,650.54 | 1286.60 | 2.28 | 9.49 | 11.22 |
| Hang Seng | 27,183.15 | 155.99 | 0.58 | 1.52 | 3.21 |
| Shanghai Com | 4,128.37 | 5.28 | 0.13 | 2.80 | 2.61 |

Source: Bloomberg

| Levels | Nifty 50 | Bank Nifty |
|------------|-----------------|-----------------|
| Closing | 25,935.15 | 60,626.40 |
| Support | 25,750 & 25,570 | 60,340 & 59,900 |
| Resistance | 26,050 & 26,180 | 61,200 & 60,890 |

| FII DII Activity | Gross Purchase | Gross Sale | Net Purchase/Sale |
|------------------|----------------|------------|-------------------|
| FII Cash Market | 16,699.82 | 16,630.37 | 69.45 |
| DII Cash Market | 15,262.90 | 14,088.69 | 1,174.21 |

Source: Bloomberg

| Trading Activity | Close Price | 1D (%) change | Volume ('000) |
|--------------------|-------------|---------------|---------------|
| Top Gainers | | | |
| Eternal | 303.80 | 5.18 | 102621.68 |
| Tata Steel | 208.01 | 2.98 | 82443.79 |
| ONGC | 272.15 | 2.08 | 13459.68 |
| Bajaj Auto | 9774.00 | 1.92 | 347.02 |
| M&M | 3675.80 | 1.83 | 1917.43 |
| Top Losers | | | |
| HCL Tech | 1573.10 | -1.80 | 3234.79 |
| Bajaj Finance | 965.60 | -1.79 | 6166.75 |
| Dr Reddys Labs | 1256.00 | -1.53 | 1412.80 |
| Shriram Finance | 1048.60 | -1.33 | 4345.36 |
| Bharti Airtel | 2011.30 | -1.32 | 9077.76 |

Source: Bloomberg

| Commodity, Currency & Debt | LTD | 1D (%) change | YTD (%) |
|----------------------------|----------|---------------|---------|
| Brent (USD/bbl) | 69.19 | 0.22 | 13.89 |
| WTI (USD/bbl) | 64.38 | 0.03 | 12.32 |
| Gold Spot (USD/t oz.) | 5,023.47 | -0.83 | 16.41 |
| USD/INR | 90.58 | 0.20 | 0.68 |
| 10 Year G-Sec India | 6.725 | -0.46 | 2.17 |
| US 10 Year Bond | 4.134 | -0.27 | 0.56 |

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian market indexes rose for the third consecutive day on Tuesday, extending recent gains as early signs of a revival in foreign portfolio inflows following a trade pact with the United States boosted investor sentiment.

Global

The S&P 500 and the Nasdaq closed lower on Tuesday while the Dow edged up to its third record close in a row, as investors digested disappointing retail sales figures and waited for a key labor market report.

Japan's Nikkei 225 continued its post-election rally and reached new highs on Tuesday, amid gains in the broader Asian markets.

Hong Kong stocks gained, extending a rebound from a sell-off in technology companies, as traders returned to the risk-on mode on bets that the tumult has run its course.

Commodities & Currency :

The Indian rupee strengthened slightly on Tuesday, supported by likely portfolio inflows and broad-based weakness in the US dollar, although demand for dollars from local corporates kept a lid on the rise.

Gold fell on Tuesday as the market consolidated ahead of US jobs and inflation data that could offer further clues to the Federal Reserve's interest-rate outlook.

News:

India's coal consumption could more than double by mid-century before plunging sharply as the country shifts toward cleaner energy, long-term projections published by government think-tank NITI Aayog show.

US private equity firm Carlyle will invest 21 billion rupees (\$232 million) in the housing finance unit of India's Edelweiss Financial the Indian firm said on Tuesday.

Indian jeweller and watchmaker Titan reported a 61% jump in third-quarter profit on Tuesday, buoyed by higher average selling prices for gold jewellery and strong demand during the festive season.

Citigroup said on Tuesday that it has appointed Ankur Khurana as head of Citi Commercial Bank in India, underscoring the US lender's push to strengthen its full-service commercial banking franchise in Asia.

India's Apollo Hospitals Enterprise (APLH.NS), opens new tab posted a bigger-than-expected rise in quarterly profit on Tuesday, its seventh straight quarter of profit increase, as demand for specialty care services climbed.

Indian investors piled into gold exchange-traded funds in January as prices soared amid rising geopolitical risk, surpassing flows into equity funds for the first time, industry data showed on Tuesday.

Indian wire maker R R Kabel expects its volumes to grow at 18% in fiscal 2027, as India recent trade deals aim to ease pressure in export markets, an executive told Reuters on Tuesday, adding that some major customers have already resumed talks on new orders.

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