AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

12th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,471.70	-112.10	-0.46	-1.22	-6.41
BSE Sensex	78,154.25	-388.19	-0.49	-0.62	-8.26
Bank Nifty	57,446.25	-240.7	-0.42	-1.38	-3.79
Nifty Midcap 100	63,843.85	-11.85	-0.02	0.26	5.09
Nifty Smallcap 100	19,857.15	43.20	0.22	1.37	12.16
S&P 500	7,728.20	-24.91	-0.32	1.68	12.68
DJIA	53,791.85	-184.13	-0.34	1.15	11.18
Nasdaq 100	29,525.48	-96.32	-0.33	2.60	17.14
Nikkei 225	66,970.22	1363.51	2.08	5.04	29.20
Hang Seng	25,652.82	-284.67	-1.10	-1.37	-2.60
ShanghaiCom	3,934.09	-32.50	-0.82	3.27	-2.22

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,471.70	57,446.25
Support	24,436 & 24,401	57,232 & 57,126
Resistance	24,549 & 24,584	57,575 & 57,681

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,628.47	14,369.92	258.55
DII Cash Market	15,006.72	14,981.95	24.77

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Dr Reddys Labs	1205.00	3.99	3936.81
Eternal	318.00	2.50	20749.57
TCS	2445.70	0.82	1514.11
Titan Company	5128.00	0.75	1664.85
Infosys	1190.70	0.65	10160.09
Top Losers			
TATA Cons. Prod	1078.00	-2.77	1933.87
Max Healthcare	1040.00	-2.71	2892.17
Nestle	1493.20	-2.32	1955.84
UltraTechCement	11780.00	-2.14	184.92
Apollo Hospital	8750.50	-1.81	562.07

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	88.78	1.21	46.14
WTI (USD/bbl)	83.18	1.28	45.12
Gold Spot (USD/t oz.)	4,371.51	-0.44	0.91
USD/INR	95.45	-0.15	6.09
10 Year G-Sec India	6.78	0.22	3.00
US 10 Year Bond	4.68	-0.17	12.32

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, Indian share indices dipped, led by heavyweight financials, as increased crude prices impacted confidence, offsetting support from a robust quarterly earnings season and renewed foreign buying.

Global

Wall Street ended lower, with Amazon and Alphabet dipping, as investors became more pessimistic about a potential deal to bring stability to the Middle East.

Japan equities were higher at the close, as gains in the Real Estate, Banking and Textile sectors led shares higher.

Chinese stocks fell on Tuesday as investor confidence weakened amid fading hopes of a quick easing in US-Iran tensions. The Shanghai Composite dropped 0.82% to 3,934.1, while the Shenzhen Component declined 0.40% to 14,259.4.

Commodities & Currency:

The Indian rupee slipped to its weakest level in nearly two weeks on Tuesday as oil prices jumped on fading hopes for a US-Iran deal to end the war and reopen the Strait of Hormuz.

Gold edged higher after touching a more than two-month peak earlier, with market participants awaiting key US inflation figures that could shape expectations for the Federal Reserve's policy path.

News:

Vodafone Idea reaffirmed plans to grow revenue by double digits, triple cash EBITDA and invest 450 billion rupees ($4.72 billion) in its network over three years, CEO Abhijit Kishore said during an earnings call.

Raymond Lifestyle expects Europe to account for roughly a quarter of its exports in two years as the Indian apparel maker expands in the region to reduce reliance on the United States amid shifting trade policies, CEO Satyaki Ghosh said.

Equity mutual fund inflows in India fell 14.8% month-on-month to 246.97 billion rupees ($2.59 billion) in July as large-cap funds saw outflows for the first time since December 2023, while investors poured record amounts into small-caps.

Indian tyre maker MRF posted a 2% fall in first-quarter profit, as conflict in the Middle East drove up crude oil prices and increased the cost of key raw materials such as synthetic rubber and carbon black.

A monsoon in India is expected to bring below-average rainfall to the country's western, central and southern regions over the next fortnight, threatening newly planted cotton, soybean, corn and pulse crops, two senior weather officials said.

Credit ratings agency Fitch affirmed India's sovereign rating at 'BBB-', citing robust growth balanced against still-weak fiscal metrics that it reckons could face pressure from rising concerns over youth unemployment.