AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

13th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,435.95	-35.75	-0.15	-1.37	-6.54
BSE Sensex	77,966.35	-187.90	-0.24	-0.86	-8.48
Bank Nifty	57,885.85	439.60	0.77	-0.62	-3.06
Nifty Midcap 100	64,024.40	180.55	0.28	0.54	5.39
Nifty Smallcap 100	19,821.65	-35.5	-0.18	1.19	11.96
S&P 500	7,748.50	20.3	0.26	1.95	12.98
DJIA	53,770.27	-21.58	-0.04	1.11	11.14
Nasdaq 100	29,742.60	217.12	0.74	3.36	18.00
Nikkei 225	67,524.06	553.84	0.83	5.91	30.27
Hang Seng	25,440.17	-212.65	-0.83	-2.19	-3.41
ShanghaiCom	3,946.68	12.58	0.32	3.60	-1.91

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,435.95	57,885.85
Support	24,312 & 24,264	57,434 & 57,285
Resistance	24,471 & 24,520	57,917 & 58,066

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,584.64	17,587.14	-1,002.50
DII Cash Market	21,518.55	15,676.89	5,841.66

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Hindalco	1078.50	2.80	8786.84
Bharti Airtel	1945.00	1.56	10871.16
SBI	1082.00	1.50	17673.92
Jio Financial	256.05	1.31	13290.34
UltraTechCement	11891.00	0.94	328.11
Top Losers			
TCS	2349.70	-3.93	7022.65
Max Healthcare	1007.50	-3.13	2762.82
Apollo Hospital	8597.00	-1.75	876.69
M&M	3403.60	-1.63	1834.08
TATA Cons. Prod	1061.90	-1.49	1713.13

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	88.76	-0.17	46.11
WTI (USD/bbl)	83.04	-0.19	44.87
Gold Spot (USD/t oz.)	4,401.18	0.71	1.59
USD/INR	95.33	0.12	5.97
10 Year G-Sec India	6.78	-0.02	2.98
US 10 Year Bond	4.68	-0.35	12.22

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian equities slumped due to increased oil prices and caution ahead of local and US inflation data. Tata Group stocks also declined following Chairman N. Chandrasekaran's decision to step down.

Global

The S&P 500 and the Nasdaq ended higher on Wednesday, lifted by upbeat quarterly results from CoreWeave and other AI infrastructure firms, while mild inflation data reinforced bets that the US Federal Reserve will hold interest rates steady in September.

Asian equities broadly rebounded, led by technology stocks, as upbeat outlooks from US AI companies CoreWeave and Super Micro Computer boosted investor sentiment and optimism around sustained AI-driven spending.

Commodities & Currency:

The Indian rupee ended modestly higher, wedged between anxiety over the Middle East conflict and the impact of persistent central bank intervention that has helped steady the currency.

Gold rose to a more than two-month high on Wednesday after a US inflation reading matched expectations, bolstering bets that the Federal Reserve will keep rates on hold in September.

News:

India's retail inflation accelerated in July, led by higher food prices, to a pace that is still unlikely to push the central bank to hike interest rates over the next few months.

India is weighing wide-ranging reforms of health insurance, from benchmarked treatment rates to a nationwide claims exchange, as it looks to boost transparency in a struggle to hold down some of the highest medical inflation in Asia, two sources said.

Tata Group stocks extended their fall to more than 5% on Wednesday, dragging Indian equity benchmarks, after Tata Sons Chairman N. Chandrasekaran resigned, sparking a selloff across the conglomerate's listed companies.

India's Hindustan Aeronautics reported a nearly 15% rise in first-quarter profit on Wednesday, buoyed by robust execution of defence orders and steady progress on project deliveries.

Temasek-backed Milky Mist Dairy Food's nearly $163 million initial public offering was fully subscribed on the second day of a three-day bidding process on Wednesday, led by retail and non-institutional investors.

India's Tata Motors said it expects demand to stay firm in the coming quarters, supported by higher-payload trucks, electric vehicles and a strong government order book, as it plans price hikes and cost cuts to counter rising commodity-related expenses.

Apollo Hospitals Enterprise posted a bigger-than-expected 34% rise in quarterly profit on Wednesday, as strong demand for complex treatments supported growth in its core healthcare services business.