Daily Market Insight

~ Where the market left its footprints

13th July 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,206.90	244.10	1.02	0.84	-7.42
BSE Sensex	77,569.39	827.57	1.08	0.84	-8.94
Bank Nifty	58,045.90	793.45	1.39	0.02	-2.79
Nifty Midcap 100	63,036.80	869.95	1.40	1.66	3.76
Nifty Smallcap 100	19,416.50	295.65	1.55	2.56	9.67
S&P 500	7,575.39	31.75	0.42	1.23	10.45
DJIA	52,637.01	149.6	0.29	0.63	8.79
Nasdaq 100	29,825.11	98.01	0.33	0.05	18.32
Nikkei 225	68,557.73	813.88	1.20	-2.72	32.27
Hang Seng	24,175.12	144.94	0.60	4.86	-8.21
ShanghaiCom	3,996.16	-40.43	-1.00	-2.83	-0.68

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,206.90	58,045.90
Support	24,143 & 24,118	57,700 & 57,540
Resistance	24,226 & 24,252	58,216 & 58,375

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	15,318.07	12,714.35	2,603.72
DII Cash Market	17,171.75	15,152.07	2,019.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Jio Financial	241.96	3.68	27714.16
HDFC Life	567.70	2.87	6139.13
Adani Enterprise	3157.30	2.39	2145.34
SBI Life Insurance	1862.90	2.26	828.83
Reliance	1307.80	2.19	8412.54
Top Losers			
Dr Reddys Labs	1244.30	-1.99	8106.61
Eternal	289.65	-0.96	24239.85
Bharti Airtel	1920.40	-0.55	6420.89
Nestle	1455.20	-0.55	1563.91
Sun Pharma	1935.50	-0.17	1478.17

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	76.01	-0.38	25.12
WTI (USD/bbl)	71.41	-0.93	24.58
Gold Spot (USD/t oz.)	4,119.93	-0.09	-4.90
USD/INR	95.33	0.06	5.96
10 Year G-Sec India	6.71	-0.56	2.01
US 10 Year Bond	4.56	0.22	9.46

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities climbed on Friday, helping indices pare weekly losses, as falling oil prices and a weaker dollar supported confidence. TCS's better-than-expected results also lifted IT companies.

Global

The S&P 500 rose to end just short of a record high on Friday, as a blockbuster Nasdaq debut of South Korea's SK Hynix fueled optimism about memory-chip makers, while investors looked ahead to quarterly earnings season kicking off next week.

Japanese equity markets ended higher on Friday, supported by gains in semiconductor stocks and positive cues from Wall Street. The Nikkei 225 Index rose 1.2% to 68,558, while the broader Topix Index gained 0.4% to 4,036, marking the second consecutive session of gains.

Chinese equity markets ended lower on Friday as investors booked profits in technology shares after a strong recent rally. The Shanghai Composite Index declined 1.0% to 3,996.2, while the Shenzhen Component Index fell 2.3%, reversing earlier gains.

Commodities & Currency :

The Indian rupee ended nearly flat on Friday but declined from a week earlier as renewed hostilities in the Middle East made investors cautious about exposure to oil-sensitive currencies and sparked a modest pickup in importer hedging.

Gold eased on Friday and was on course for a weekly decline, as higher oil prices linked to the Middle East conflict fuelled inflation concerns and bolstered expectations of tighter U.S. monetary policy.

News:

India's NSE will pitch its initial public offering (IPO) to over 30 global investors this month as a bet on the country's rapid financial expansion and growing capital-market participation, according to two sources and an investor presentation reviewed by Reuters.

India's Oil and Natural Gas Corp will build a 1.75 million metric ton (about 13 million barrels), strategic petroleum reserve in Mangalore in southern India, the company said in a stock exchange filing late on Thursday.

Dr Reddy's Laboratories logged its steepest weekly loss in three years on Friday, after a disruption in generic semaglutide supply raised concerns it could lose its edge in the highly competitive diabetes market.

India's Shapoorji Pallonji Group opened its first-ever U.S. dollar bond issue for subscription on Friday, looking to raise $650 million, three sources aware of the matter said.

Flows to India's equity mutual funds jumped 26.5% month-on-month in June, from their lowest in a year, as easing Middle East tensions and rupee-stabilising measures lifted sentiment.

Gold traded at a wide discount in India this week as price volatility weighed, while demand in China remained steady with the country's central bank reporting its largest monthly increase in gold reserves in more than 2-1/2 years in June.