

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,842.65	-207.95	-0.86	5.13	-8.81
BSE Sensex	76,847.57	-702.68	-0.91	5.08	-9.79
Bank Nifty	55,605.05	-307.7	-0.55	8.08	-6.88
Nifty Midcap 100	57,513.30	-330.65	-0.57	6.86	-5.33
Nifty Smallcap 100	16,762.00	-78.1	-0.46	6.70	-5.33
S&P 500	6,967.38	81.14	1.18	5.96	1.59
DJIA	48,535.99	317.74	0.66	4.23	0.32
Nasdaq 100	25,842.00	458.28	1.81	7.59	2.52
Nikkei 225	57,877.39	1374.62	2.43	7.70	11.66
Hang Seng	25,872.32	211.47	0.82	2.29	-1.77
Shanghai Com	4,026.63	38.07	0.95	1.98	0.08

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,842.65	55,605.05
Support	23,634 & 23,551	54,704 & 54,375
Resistance	23,902 & 23,985	55,771 & 56,100

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	15,382.09	17,365.27	-1,983.18
DII Cash Market	16,612.03	14,179.73	2,432.30

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HDFC Life	619.10	2.47	5549.76
ICICI Bank	1351.10	2.21	30572.14
Adani Enterprise	2129.00	2.02	3729.77
NTPC	386.25	1.60	15240.05
TMPV	345.50	0.85	13113.11
Top Losers			
Eicher Motors	7050.00	-5.04	1246.86
Maruti Suzuki	13076.00	-4.62	1347.91
Interglobe Avi	4427.20	-2.79	1662.56
Bajaj Finance	898.95	-2.77	10723.31
Reliance	1315.10	-2.60	28753.27

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	94.69	-4.69	55.88
WTI (USD/bbl)	91.49	-7.66	59.61
Gold Spot (USD/t oz.)	4,838.47	2.07	11.68
USD/INR	93.38	-0.70	3.80
10 Year G-Sec India	6.940	0.41	5.44
US 10 Year Bond	4.246	-0.05	1.89

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dipped on Monday, echoing losses across Asia, as oil rose beyond \$100 per barrel ahead of a US blockade of Iran's ports after weekend talks failed to resolve the war. GIFT Nifty futures were trading at 24,228 as of 7:38 am, indicating that the benchmark Nifty 50 will open about 1.6% above Monday's close of 23,842.65.

Global

Wall Street's main indexes advanced and the S&P 500 neared a record closing high as investors were optimistic about prospects to resolve the Middle East conflict while they assessed the latest batch of bank earnings and US inflation readings.

Major stock markets across Asia rose on Tuesday, with Taiwan logging a fresh record high and Singapore recovering a key threshold. Equities in Japan and South Korea also jumped, with the benchmarks in both countries nearing all-time closing peaks reached before the US-Israeli war with Iran began on Feb. 28.

Commodities & Currency :

The Indian rupee endured its steepest fall in two weeks on Monday, as oil prices climbed past \$100 per barrel, while supportive dollar flows for the currency, spurred by banks' unwinding of arbitrage positions, dissipated.

Gold prices gained 2% on Tuesday as the US dollar weakened, while hopes of a resumption in US-Iran talks also supported prices by easing inflation concerns.

News:

US President Donald Trump and Indian Prime Minister Narendra Modi stressed the importance of keeping the Strait of Hormuz open and secure in a call on Tuesday, Modi said in a post on X.

India's retail inflation rose modestly to 3.4% in March, government data showed on Monday, amid worries that a prolonged Middle East war and deficient monsoon showers could raise the cost of living over the coming months.

India is likely to see below-average monsoon rains for the first time in three years in 2026, the government said on Monday, stoking concerns over farm output and growth in Asia's third-largest economy as it battles inflation driven by the Iran war.

India's palm oil imports in March dropped nearly 19% on-month and hit a three-month low after a rally in tropical oil prices, in line with energy markets, prompted refiners to hold back purchases, a trade body said on Monday.

India's top solar energy-generating state of Rajasthan has clean energy projects of capacity amounting to about 60 gigawatt (GW) awaiting transmission links as planners struggle to keep pace with a rapid build-out, a regulatory filing showed.

Indian real estate and infrastructure firm RMZ Group said on Monday it plans to invest more than \$35 billion over the next five years and is considering an initial public offering to raise permanent, long-term capital.

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