

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,231.30	388.65	1.63	6.84	-7.33
BSE Sensex	78,111.24	1263.67	1.64	6.81	-8.31
Bank Nifty	56,301.95	696.9	1.25	9.43	-5.71
Nifty Midcap 100	58,777.75	1264.45	2.20	9.21	-3.25
Nifty Smallcap 100	17,156.40	394.4	2.35	9.21	-3.10
S&P 500	7,022.95	55.57	0.80	6.81	2.40
DJIA	48,463.72	-72.27	-0.15	4.08	0.17
Nasdaq 100	26,204.58	362.58	1.40	9.09	3.96
Nikkei 225	58,134.24	256.85	0.44	8.18	12.16
Hang Seng	25,947.32	75.00	0.29	2.58	-1.49
Shanghai Com	4,027.21	0.58	0.01	1.99	0.09

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,231.30	56,301.95
Support	24,168 & 24,136	56,140 & 55,981
Resistance	24,271 & 24,302	56,658 & 56,817

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	18,075.63	17,409.48	666.15
DII Cash Market	18,499.57	19,068.55	-568.98

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Interglobe Avi	4638.00	4.76	1623.09
Eternal	246.67	4.42	56072.73
Max Healthcare	990.05	4.03	2759.02
Power Grid Corp	312.45	4.03	21897.20
TMPV	357.90	3.59	12495.09
<b>Top Losers</b>			
Dr Reddys Labs	1217.80	-1.46	4693.41
Bharti Airtel	1855.70	-0.81	11049.11
ICICI Bank	1348.10	-0.22	23827.47

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	94.76	-0.03	55.98
WTI (USD/bbl)	91.24	-0.04	59.18
Gold Spot (USD/t oz.)	4,797.09	-0.92	10.73
USD/INR	93.38	0.01	3.79
10 Year G-Sec India	6.866	-1.07	4.32
US 10 Year Bond	4.272	-0.28	2.51

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Wednesday, Indian equities surged to a one-month high, matching Asian peers, as oil slipped below \$100 per barrel on fresh US-Iran talks. GIFT Nifty Hints At Gap-Up Open; Brent Crude Below \$95 A Barrel.

#### Global

On Wall Street, the benchmark S&P 500 and tech-heavy Nasdaq Composite rallied to record closing highs on Wednesday as investors were encouraged by corporate earnings and hopeful of progress in US-Iran negotiations.

Japan's Nikkei share average closed at a more than one-month high on Wednesday, as prospects of a new round of peace talks between the United States and Iran lifted investor sentiment and sent crude oil prices lower.

Hong Kong stocks advanced on Wednesday, tracking overnight gains on Wall Street, as renewed optimism over a potential resumption of US-Iran talks eased geopolitical concerns and dragged oil prices lower.

### Commodities & Currency :

The Indian rupee closed nearly unchanged on Wednesday, wedged between comfort from a decline in crude oil prices and persistent dollar demand from local importers, including oil marketing companies.

Gold drifted lower on Wednesday after hitting a one-month peak as investors assessed the latest signals on the US-Iran situation and what they could mean for the interest rate outlook.

### News:

India's merchandise trade deficit unexpectedly narrowed in March as a surge in exports to the US helped cushion the impact of the ongoing Iran war that has disrupted shipping routes and inflated energy costs.

India's wholesale prices rose 3.88% year-on-year in March, its fastest pace in over three years, driven by higher prices of oil, food and manufactured products, government data showed on Wednesday.

Indian non-bank lender HDB Financial Services reported a 41.4% rise in fourth-quarter profit on Wednesday, driven by margin expansion, improving asset quality and growth in its consumer finance portfolio.

Indian Potash Ltd has received offers to supply 5.6 million metric tons of urea in its latest tender at significantly higher prices than in the previous one, after supplies were disrupted by the US-Israeli war with Iran, two company sources said.

Indian banks are expected to report a steady profit rise in the January-March quarter, four brokers said, aided by credit growth and liquidity buffers, while higher bond yields and forex arbitrage curbs weighed on treasury income.

India's gems and jewellery exports in the 2025/26 fiscal year dipped 3.3% from a year earlier to their lowest level in five years, as shipments to top buyer the US nearly halved, a leading trade body said on Wednesday, reflecting the impact of tariffs and duties.

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