

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,196.75	-34.55	-0.14	6.69	-7.46
BSE Sensex	77,988.68	-122.56	-0.16	6.64	-8.45
Bank Nifty	56,086.40	-215.55	-0.38	9.01	-6.07
Nifty Midcap 100	59,146.75	369.00	0.63	9.90	-2.64
Nifty Smallcap 100	17,308.85	152.45	0.89	10.18	-2.24
S&P 500	7,041.28	18.33	0.26	7.09	2.67
DJIA	48,578.72	115.00	0.24	4.32	0.41
Nasdaq 100	26,333.00	128.42	0.49	9.63	4.47
Nikkei 225	59,518.34	1384.1	2.38	10.75	14.83
Hang Seng	26,394.26	446.94	1.72	4.35	0.21
Shanghai Com	4,055.55	28.34	0.70	2.71	0.80

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,196.75	56,086.40
Support	24,120 & 24,049	55,915 & 55,694
Resistance	24,347 & 24,418	56,630 & 56,851

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	16,209.44	15,827.08	382.36
DII Cash Market	16,538.08	19,965.83	-3,427.75

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
Hindalco	1039.90	2.81	10942.18
Adani Enterprise	2203.70	2.77	2188.91
Trent	4083.30	2.64	1392.77
Adani Ports	1549.80	2.51	7476.05
Eternal	252.70	2.44	48279.73
<b>Top Losers</b>			
HDFC Bank	795.45	-1.78	62861.29
ONGC	282.75	-1.69	13626.40
HDFC Life	631.50	-1.40	3022.53
Titan Company	4461.40	-1.34	1283.71
Apollo Hospital	7553.00	-1.16	400.49

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	98.69	3.96	62.45
WTI (USD/bbl)	93.89	2.85	63.80
Gold Spot (USD/t oz.)	4,792.29	0.03	10.62
USD/INR	93.20	0.19	3.59
10 Year G-Sec India	6.888	0.32	4.66
US 10 Year Bond	4.311	0.00	3.46

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Thursday, Indian equities finished modestly down as investors booked profits after recent significant gains. Global markets surged for the tenth consecutive day to record highs on optimism of an agreement to stop the Middle East war. The GIFT Nifty, an early indicator of Nifty 50's performance, traded at 24,163, compared to Thursday's index close of 24,196.75.

#### Global

The benchmark S&P 500 and the tech-heavy Nasdaq rose modestly to record closing highs for a second straight day on Thursday on optimism that the worst of the Middle East conflict had passed after Israel agreed to a temporary ceasefire with Lebanon and US President Donald Trump indicated the US and Iran could meet again on the weekend.

Japan's Nikkei 225 Stock Average ended the day at a new record high, erasing its losses from the Iran war on optimism the new peace talks may hasten the end to the conflict.

### Commodities & Currency :

The Indian rupee closed slightly stronger on Thursday on growing optimism over a potential deal to end the Iran war, which kept oil prices below \$100 a barrel and lifted global equities to record highs.

Gold prices held steady on Thursday after hitting a one-month high in the previous session.

### News:

India's Wipro announced a record share buyback of up to 150 billion rupees (\$1.61 billion) on Thursday after reporting a slight quarterly revenue miss, as clients held back tech spending in energy and banking sectors while business from key customer Estee Lauder slowed.

India is considering a proposal to restrict sulphur exports after industry lobby groups raised concerns about soaring prices and disruption to supplies from the Gulf, three sources aware of the development said.

Hetero Labs, one of India's largest privately held drugmakers, aims to sell 1.5 million pens of generic weight-loss and diabetes drugs in the first year as it rolls out the products in more than 75 countries over the next few years, a top executive said.

India's HDFC Life Insurance Company posted a fall in quarterly new business value on Thursday while reporting a slight profit rise, driven by policy renewals.

Renault is betting on electric vehicles and hybrids to win over buyers in the world's third-largest car market, global CEO Francois Provost said on Thursday, as the French carmaker steps up its product push to regain market share.

India's government launched a bid to overhaul its democratic system on Thursday, with bills to increase the size of parliament and bring forward plans to reserve a third of seats for women - though the opposition dismissed it as an attempt to manipulate elections.

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