AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

17th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,366.00	**-29.85**	**-0.12**	**-1.65**	**-6.81**
BSE Sensex	78,009.25	**-70.71**	**-0.09**	**-0.80**	**-8.43**
Bank Nifty	57,491.10	**-144.15**	**-0.25**	**-1.30**	**-3.72**
Nifty Midcap 100	63,782.15	**-339.40**	**-0.53**	**0.16**	**4.99**
Nifty Smallcap 100	19,738.55	**-136.55**	**-0.69**	**0.76**	**11.49**
S&P 500	7,785.76	**-13.26**	**-0.17**	**2.44**	**13.71**
DJIA	53,732.41	**-107.58**	**-0.20**	**1.04**	**11.28**
Nasdaq 100	30,046.14	**-38.36**	**-0.13**	**4.41**	**19.35**
Nikkei 225	68,713.80	**405.21**	**0.59**	**7.78**	**32.57**
Hang Seng	25,116.85	**-279.66**	**-1.10**	**-3.43**	**-4.64**
ShanghaiCom	3,927.18	**0.21**	**0.01**	**3.08**	**-2.39**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,366.00	57,491.10
Support	24,314 & 24,289	57,403 & 57,332
Resistance	24,397 & 24,423	57,633 & 57,704

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,854.44	12,346.32	**508.12**
DII Cash Market	14,295.49	13,939.09	**356.40**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Apollo Hospital	8920.50	**3.73**	1275.74
Bharti Airtel	1992.10	**2.73**	12282.58
Adani Ports	1700.00	**2.53**	1978.20
Adani Enterprise	3035.10	**2.37**	1666.75
ICICI Bank	1417.00	**0.73**	6097.93
Top Losers			
TMPV	334.50	**-4.32**	31933.03
Jio Financial	249.05	**-2.56**	16541.51
Asian Paints	2696.30	**-2.15**	667.31
Hindalco	1029.50	**-1.60**	3423.33
ONGC	236.40	**-1.46**	12128.66

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	87.58	**0.59**	**44.16**
WTI (USD/bbl)	82.03	**0.96**	**43.11**
Gold Spot (USD/t oz.)	4,378.86	**0.65**	**1.07**
USD/INR	95.44	**0.01**	**6.08**
10 Year G-Sec India	6.76	**0.00**	**2.67**
US 10 Year Bond	4.696	**1.19**	**11.42**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity benchmarks retreated this week after two consecutive weekly gains, as lingering uncertainty in the Middle East and elevated crude oil prices tempered risk appetite for stocks in the world's third-largest crude importer.

Global

Wall Street's main indexes closed lower on Friday, with the S&P 500 dipping from a record high, as investors digested weaker-than-expected retail sales data.

Japans stock markets rose, as shares extended their rally, helped by strong gains on Wall Street and softer US inflation data, which reduced expectations of a September Federal Reserve rate hike.

Chinas stock markets ended mixed on Friday as strong gains in semiconductor and AI-related shares helped offset concerns over new US trade measures.

Commodities & Currency:

The Indian rupee closed the week with losses against the dollar, with frequent dollar-selling interventions by the central bank curbing declines from the prolonged uncertainty from the months-long Middle East conflict.

Gold prices steadied on Friday after pulling back from a more than two-month high, as investors booked profits following a rally fuelled by softer US inflation data and fading expectations for a Federal Reserve rate hike in September.

News:

India's foreign exchange reserves rose to a four-month high of $707 billion as of August 7, bolstered by robust inflows under policy measures to strengthen India's balance of payments.

Tata Steel sold all its stake in Indian Super League side Jamshedpur FC to Goa-based club Churchill Brothers for a token amount of 100 Indian rupees ($1.05) on Friday, two weeks after the conglomerate announced it was pulling out of the ISL.

Shares of India's Tata Motors Passenger Vehicles tab fell as much as 6% on Friday after the automaker posted an 80% plunge in quarterly profit and warned that margin pressures would persist into the second quarter.

India's wholesale prices rose 9.78% year-on-year in July, easing marginally from June due to lower energy inflation, government data released on Friday showed.

India's edible oil imports rose to their highest level in 10 months in July as refiners stepped up purchases of palm oil and soyoil to replenish inventories ahead of the festival season, a leading trade body said. The Reserve Bank of India likely intervened in the foreign exchange market on Friday, three traders told Reuters, as uncertainty over the Middle East conflict kept risk appetite muted and oil prices elevated.