



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,989.15	135.25	0.57	2.59	-8.25
BSE Sensex	76,808.48	544.15	0.71	3.42	-9.84
Bank Nifty	57,297.15	98.35	0.17	6.81	-4.04
Nifty Midcap 100	61,802.05	252.40	0.41	1.60	1.73
Nifty Smallcap 100	18,477.75	77.75	0.42	2.77	4.37
S&P 500	7,511.35	-42.94	-0.57	-1.17	9.52
DJIA	51,999.67	328.64	0.64	1.80	7.48
Nasdaq 100	29,968.13	-575.79	-1.89	-1.79	18.89
Nikkei 225	69,404.50	87.00	0.13	3.69	33.90
Hang Seng	24,493.95	-348.72	-1.40	-3.56	-7.00
ShanghaiCom	4,091.89	-4.58	-0.11	0.84	1.70

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,989.15	57,297.15
Support	23,916 & 23,889	57,134 & 57,058
Resistance	24,004 & 24,030	57,381 & 57,457

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,887.15	14,636.33	-749.18
DII Cash Market	13,553.36	13,553.30	0.06

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1159.00	3.55	8343.47
TATA Cons. Prod	1130.90	2.77	2602.43
NTPC	355.55	2.14	14555.18
Bajaj Finserv	1787.30	2.12	2043.23
HUL	2199.90	2.03	1337.31
Top Losers			
Hindalco	982.40	-3.11	11200.46
JSW Steel	1274.30	-1.71	1110.63
HDFC Life	574.40	-1.17	2066.30
Apollo Hospital	8390.50	-0.92	263.17
Eicher Motors	7560.50	-0.84	453.80

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	79.63	-4.26	31.08
WTI (USD/bbl)	76.89	-4.78	34.14
Gold Spot (USD/t oz.)	4,351.03	0.91	0.43
USD/INR	94.57	0.16	5.11
10 Year G-Sec India	6.88	0.00	4.49
US 10 Year Bond	4.435	-0.09	6.44

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian markets closed higher on Tuesday, gaining for the third straight session, as a preliminary US-Iran peace deal lowered oil prices and boosted risk appetite. India's GIFT Nifty futures were trading at 24,005 as of 7:46 am, indicating that the Nifty 50 may open near Tuesday's close of 23,989.15.

Global

The Nasdaq and the S&P 500 finished lower on Tuesday under pressure from technology stocks, while the Dow marked its second straight record close. Lisa Bernhard reports.

Japan equities were higher at the close, as gains in the Real Estate, Banking and Textile sectors led shares higher. At the close in Tokyo, the Nikkei 225 added 0.13% to hit a new all time high.

Chinese equities ended mixed on Tuesday, with the Shanghai Composite edging down 0.11% to 4,092, while the Shenzhen Component gained 0.93% to 15,675 for a second consecutive session of gains.

Commodities & Currency :

The Indian rupee rose for a third consecutive session on Tuesday as underlying sentiment remained supportive, while traders awaited details of the US-Iran peace agreement and guidance from the U.S. Federal Reserve.

Gold prices rose on Tuesday as expectations of an interest rate hike from the US Federal Reserve this year eased, following an interim US-Iran peace deal that lowered oil prices and reduced inflation fears.

News:

India has restricted cough syrup sales to licensed pharmacies especially in villages, preventing over-the-counter sales from retail outlets, as regulators step up scrutiny following contamination-linked child deaths last year.

Tata Consultancy Services will book a one-time exceptional charge of \$70 million after the US Supreme Court rejected its appeal in a trade secrets case, bringing its total exposure in the matter to \$220 million, the firm said on Monday.

Indian miner IREL is in talks with Rosneft to source rare earth samples from Tomtor, the Siberian deposit acquired by the Russian oil producer last year, as New Delhi seeks to secure supplies of critical minerals dominated by China, a source said.

India's Royal Orchid Hotels plans to open at least 50 hotels in the next 12 to 18 months across the country, its founder said, as the company bets on geopolitical tensions driving more Indians to travel locally rather than abroad.

India's Tata Motors Passenger Vehicles said on Tuesday it is targeting a market share of 18-20% and a double-digit EBITDA margin, as it plans to invest billions across its passenger vehicle and electric vehicle segments.

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