AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

18th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,287.65	-78.35	-0.32	-1.96	-7.11
BSE Sensex	77,728.16	-281.09	-0.36	-1.16	-8.76
Bank Nifty	57,497.80	6.70	0.01	-1.29	-3.71
Nifty Midcap 100	63,817.00	34.85	0.05	0.22	5.05
Nifty Smallcap 100	19,809.25	70.7	0.36	1.12	11.89
S&P 500	7,745.06	-40.70	-0.52	1.90	13.52
DJIA	53,465.36	-272.03	-0.51	0.53	11.06
Nasdaq 100	29,995.38	-50.76	-0.17	4.23	19.20
Nikkei 225	69,220.25	506.45	0.74	8.57	33.55
Hang Seng	25,453.23	336.38	1.34	-2.14	-3.36
ShanghaiCom	3,982.65	55.48	1.41	4.54	-1.01

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,287.65	57,497.80
Support	24,241 & 24,209	57,214 & 57,064
Resistance	24,342 & 24,374	57,702 & 58,852

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,546.16	14,081.26	-2,535.10
DII Cash Market	16,654.08	11,552.62	5,101.46

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Hindalco	1049.90	1.98	3063.00
Tata Steel	186.00	1.36	16278.11
HDFC Life	543.00	1.33	3104.16
ONGC	238.49	0.88	25342.94
Axis Bank	1227.30	0.81	6068.01
Top Losers			
HCL Tech	1325.00	-2.57	970.75
Infosys	1139.90	-2.51	5817.15
Sun Pharma	1882.00	-2.49	1893.09
TCS	2313.20	-2.02	2237.64
Nestle	1470.00	-1.94	1721.06

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	89.34	0.93	47.06
WTI (USD/bbl)	83.03	0.76	44.85
Gold Spot (USD/t oz.)	4,385.75	0.21	1.23
USD/INR	95.61	-0.18	6.27
10 Year G-Sec India	6.81	0.73	3.42
US 10 Year Bond	4.728	0.08	11.42

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities dipped on Monday as a lack of movement in ending the Iran war kept crude oil prices high, and the conclusion of the quarterly results reporting season left investors with few domestic triggers.

Global

Wall Street's three major indexes finished lower as investors waited for quarterly reports from large retailers to provide insights into U.S. consumer spending, while oil prices rose as the U.S. and Iran appeared no closer to a deal.

The Nikkei 225 gained 0.74% to close at 69,220 on Monday, extending last weeks gains despite data showing Japans economy grew less than expected in the second quarter.

Chinese stocks closed higher on Monday, with the Shanghai Composite gaining 1.41% to 3,982.7 and the Shenzhen Component rising 2.44% to 14,704.3. Both indexes reached their highest levels in more than a month, led by strong gains in technology stocks.

Commodities & Currency:

The Indian rupee fell to its weakest level in two weeks on Monday as oil prices drifted higher and sentiment was bogged down after the central bank brought forward the end date for its discounted forex swap facility for overseas deposits by a month.

Gold prices rose as a weaker dollar and fading expectations of a US Federal Reserve rate hike next month supported bullion.

News:

India's soyoil imports are set to hit a record high in August as competitive prices prompt refiners to boost purchases for festive demand, while disruptions to sunflower oil shipments due to the Russia-Ukraine war push buyers to switch oils, dealers said.

India's unemployment rate for people aged 15 years and above fell to 5.1% in July, matching its lowest level in four months, government data showed on Monday.

India said on Monday that it had signed a contract with General Atomics Aeronautical Systems to lease two MQ-9B Sea Guardian high-altitude long-endurance drones for the Indian Navy for a period of 30 months at a cost of 19.43 billion rupees ($203 million).

JioBlackRock Asset Management, a venture between India's Jio Financial Services and BlackRock said on Monday it will offer regular plans for eligible mutual fund schemes, allowing investors to buy them through registered distributors.

India has set a maximum daily cooking gas production target of 63,810 metric tons for state-run and private refineries to ensure domestic supplies and build buffers after US-Israeli war against Iran disrupted supplies of the essential fuel, according to an August 13 government order.