AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

20th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,078.30	-76.60	-0.32	-2.81	-7.91
BSE Sensex	76,909.68	-325.78	-0.42	-2.20	-9.72
Bank Nifty	57,239.75	-22.65	-0.04	-1.73	-4.14
Nifty Midcap 100	63,408.75	-130.65	-0.21	-0.42	4.38
Nifty Smallcap 100	19,707.15	-101.7	-0.51	0.60	11.31
S&P 500	7,707.98	16.22	0.21	1.41	12.15
DJIA	53,468.36	120.01	0.22	0.54	10.25
Nasdaq 100	29,426.02	-64.94	-0.22	2.26	17.00
Nikkei 225	65,326.42	-2134.31	-3.16	2.46	26.03
Hang Seng	25,495.07	23.92	0.09	-1.98	-3.20
ShanghaiCom	3,894.42	-95.88	-2.40	2.22	-3.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,078.30	57,239.75
Support	24,036 & 24,001	57,064 & 56,980
Resistance	24,148 & 24,183	57,335 & 57,419

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,875.76	12,467.77	407.99
DII Cash Market	17,288.58	13,314.86	3,973.72

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1324.80	2.06	1693.63
JSW Steel	1285.80	1.44	1009.93
Sun Pharma	1900.00	1.33	1566.69
Eternal	320.00	1.30	28100.65
Wipro	179.55	0.84	5964.19
Top Losers			
Max Healthcare	997.00	-1.72	1320.46
Coal India	400.00	-1.70	6030.20
Power Grid	263.50	-1.68	9674.19
Bajaj Finance	1080.20	-1.29	2877.93
ITC	267.05	-1.09	13821.29

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	92.27	1.37	51.66
WTI (USD/bbl)	86.43	1.76	50.55
Gold Spot (USD/t oz.)	4,495.66	3.71	1.38
USD/INR	95.76	-0.08	6.44
10 Year G-Sec India	6.82	-0.15	3.57
US 10 Year Bond	4.633	-0.43	13.70

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmark indices extended their losing streak for the seventh consecutive session, as persistent geopolitical tensions and Brent crude prices above $90/bbl continued to weigh on investor sentiment

Global

The main US stock market indexes closed modestly higher on Wednesday, as easing government bond yields boosted risk appetite while a dramatic rally in shares of vaccine-maker Moderna drove gains in the healthcare sector.

Japanese equities extended their decline, with the Nikkei 225 falling 3.16%, as intensified selling in semiconductor and AI-linked stocks, alongside elevated bond yields and rising oil prices, weighed on investor sentiment.

Chinese equities slumped, with the Shanghai Composite falling 2.40% and Shenzhen Component declining 5.01%, as a broad semiconductor selloff, rising bond yields, persistent inflation concerns and geopolitical risks weighed heavily on investor sentiment.

Commodities & Currency:

The Indian rupee weakened to a three-week low of ₹95.72/USD, pressured by rising crude prices, elevated US Treasury yields and risk aversion, while RBI intervention helped limit further losses.

Gold surged over 3% to its highest in over two and a half months on Wednesday after a surprise liquidity support announcement by the US Treasury knocked down bond yields and the dollar ahead of the release of the Federal Reserve's July meeting minutes.

News:

The Centre has approved four railway multitracking projects worth ₹9,450 crore across four states, adding nearly 410 km of new tracks to enhance passenger and freight capacity.

ITC Hotels is evaluating multiple management-contract opportunities in Dubai and other proximal international markets to expand its luxury and premium hotel portfolio, with international expansion emerging as a key growth avenue.

DRDO has invited Indian private-sector firms to partner in the development and production of strategic missile and guided-bomb systems, strengthening indigenous defence manufacturing.

The government announced incentives for city gas distributors to accelerate domestic PNG connections, aiming to reduce reliance on imported LPG and curb fuel subsidy costs amid ongoing supply disruptions.

Shiprocket made a strong market debut, surging 35.1% on its first trading day after its $170 million IPO, reflecting robust investor appetite for the Temasek-backed logistics platform and India's growing e-commerce opportunity.

Hyundai Motor India said on Wednesday it will increase vehicle prices by up to 1% across its portfolio from September this year, with the extent of the hike varying by model and variant.