



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,364.85	11.30	0.05	7.43	-6.81
BSE Sensex	78,520.30	26.76	0.03	7.36	-7.83
Bank Nifty	56,582.35	16.65	0.03	9.98	-5.24
Nifty Midcap 100	59,790.75	-107.45	-0.18	11.10	-1.58
Nifty Smallcap 100	17,486.90	-78.8	-0.45	11.31	-1.23
S&P 500	7,126.06	84.78	1.20	8.38	3.90
DJIA	49,447.43	868.71	1.79	6.19	2.20
Nasdaq 100	26,672.43	339.43	1.29	11.04	5.82
Nikkei 225	58,824.89	348.99	0.60	9.46	13.49
Hang Seng	26,361.07	200.74	0.77	4.22	0.09
Shanghai Com	4,082.13	30.70	0.76	3.38	1.46

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,364.85	56,582.35
Support	24,271 & 24,214	56,396 & 56,224
Resistance	24,454 & 24,510	56,953 & 57,125

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,756.88	13,816.81	-1,059.93
DII Cash Market	18,753.06	15,786.17	2,966.89

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Trent	4242.80	3.29	2228.16
JSW Steel	1274.50	2.76	4606.07
SBI	1107.85	2.55	31179.58
Asian Paints	2516.80	2.14	1203.16
Grasim	2760.10	1.46	702.96
Top Losers			
Jio Financial	237.15	-2.75	38415.13
Hindalco	1015.25	-2.29	4286.18
TMPV	355.70	-1.22	7216.61
Kotak Mahindra	379.20	-1.15	11146.71
Bharat Elec	457.55	-1.12	9914.02

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	95.17	5.28	56.66
WTI (USD/bbl)	89.49	6.73	56.12
Gold Spot (USD/t oz.)	4,813.31	-0.35	11.10
USD/INR	93.12	-0.21	3.51
10 Year G-Sec India	6.890	-0.22	4.68
US 10 Year Bond	4.248	-1.47	1.94

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity indexes closed slightly changed on Monday, as earnings-fuelled gains in banks were tempered by concerns that the US-Iran ceasefire may not hold. GIFT Nifty futures were trading at 24,394 points as of 7:59 am indicating that the benchmark Nifty 50 will open near Monday's close of 24,364.85.

Global

US stocks closed slightly lower on Monday, with each of the three major indexes coming off a third-straight week of gains, as renewed US-Iran tensions put the durability of a two-week ceasefire in question.

Japans stock markets ended higher with the Nikkei 225 gaining 0.6% to close at 58,825 and the broader Topix Index rising 0.43% to 3,777. The rebound came after losses in the previous session, as strong interest in artificial intelligence stocks lifted sentiment despite growing geopolitical tensions.

Chinas stock markets moved higher on Monday, with the Shanghai Composite climbing 0.76% to a one-month high of 4,082, while the Shenzhen Component rose 0.55% to 14,966, its strongest level since December 2021.

Commodities & Currency :

The Indian rupee logged its steepest one-day fall in a week on Monday, with wary investors bracing for the end of the US-Iran ceasefire a day later amid rising tensions in the Middle East.

Gold prices fell to a one-week low on Monday before recovering slightly as Iran's threat of retaliation to the US takeover of an Iranian cargo vessel drove the dollar and oil prices higher.

News:

India and South Korea said on Monday that they would boost their economic ties by expanding cooperation in energy, critical minerals, shipbuilding, semiconductors and steel as they seek to double their trade to \$50 billion by 2030.

India's Gujarat International Finance Tec-City (GIFT City) has issued its first license to establish a family investment fund, marking a significant step in managing private wealth within the financial hub.

Indian discount brokerage Groww's quarterly profit more than doubled, as Middle East war-driven market volatility boosted trading activity in derivatives and commodities, the company said on Monday, while warning that prolonged market weakness carries risks for the brokerage's growth.

India has expanded the pool of Russian insurers eligible to provide marine cover to ships docking at its ports, increasing the number to 11 from eight, according to its Directorate General of Shipping.

Indian non-banking finance firm PNB Housing Finance recorded a 19% rise in fourth-quarter profit on Monday, benefiting from strong home loan demand and an improvement in asset quality.

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