AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints

21st August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	**24,231.85**	153.55	0.64	-2.19	-7.32
BSE Sensex	**77,537.72**	628.04	0.82	-1.40	-8.98
Bank Nifty	**57,495.90**	256.15	0.45	-1.29	-3.71
Nifty Midcap 100	**63,671.55**	262.80	0.41	-0.01	4.81
Nifty Smallcap 100	**19,841.45**	134.3	0.68	1.29	12.07
S&P 500	**7,641.16**	-66.82	-0.87	0.53	12.39
DJIA	**52,764.27**	-704.09	-1.32	-0.74	10.50
Nasdaq 100	**29,213.16**	-212.86	-0.72	1.52	16.74
Nikkei 225	**66,216.79**	890.37	1.36	3.86	27.75
Hang Seng	**25,698.49**	203.42	0.80	-1.20	-2.43
ShanghaiCom	**3,903.72**	9.30	0.24	2.47	-2.97

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	**24,231.85**	**57,495.90**
Support	24,196 & 24,177	57,440 & 57,376
Resistance	24,258 & 24,277	57,647 & 57,711

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,411.73	11,995.09	-583.36
DII Cash Market	16,932.72	13,395.01	3,537.71

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	327.95	2.48	36661.27
Shriram Finance	1128.20	2.01	3313.77
Kotak Mahindra	397.35	1.82	9258.92
ITC	271.65	1.72	28272.80
Bajaj Finance	1095.00	1.37	6741.48
Top Losers			
TATA Cons. Prod	1056.30	-1.10	1684.04
Hindalco	1029.85	-0.88	4321.76
Interglobe Avi	5165.00	-0.54	380.69
HCL Tech	1318.40	-0.48	1510.87
Nestle	1458.00	-0.48	1910.72

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	93.79	2.38	54.18
WTI (USD/bbl)	88.17	2.73	53.82
Gold Spot (USD/t oz.)	4,518.91	0.03	4.60
USD/INR	95.71	0.05	6.39
10 Year G-Sec India	6.87	0.79	4.39
US 10 Year Bond	4.703	0.11	12.41

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares snapped a losing streak on Thursday, led by IT and financial stocks and tracking a global rebound after the U.S. Treasury took steps to stem a bond market rout.

Global

Wall Street's main stock indexes closed lower on Thursday as rising Treasury yields dented risk appetite, disappointing results from retail bellwether Walmart soured investors on the consumer sector and rallying oil prices fanned inflation worries.

Japanese shares recovered, with the Nikkei 225 rising 1.36% to 66,217 and the broader Topix gaining 1.18% to 4,060. The rebound ended a two-day decline as markets followed a positive lead from Wall Street and global bond yields moved lower.

Chinese stocks recovered on Thursday, with the Shanghai Composite rising 0.24% to 3,903.7 and the Shenzhen Component gaining 0.59% to 13,972.8.The rebound came after the Peoples Bank of China kept its key lending rates unchanged.

Commodities & Currency:

India eased rules on rupee export payments, putting them on par with foreign-currency earnings for trade-policy benefits, aiming to promote wider use of the local currency in global trade.

Gold prices recouped some earlier losses to trade largely steady on Thursday, as prospects of lower long-term real rates offset persisting risks of higher inflation underlined by rising oil prices.

News:

Aditya Birla Capital will enter India's gold loan market and plans to open about 1,000 dedicated branches over the next three years to expand its secured lending business, the financial services firm said.

Shareholder approval for Swiggy's foreign ownership cap will let its quick-commerce unit Instamart switch to a potentially more profitable inventory model as the Indian delivery platform plays catch-up with market leader Blinkit in a highly competitive sector.

India's infrastructure output expanded 5.4% year-on-year in July, slowing a tad from the previous month, according to the second release under a revised series, as iron ore and electricty output moderated.

The world's largest coal producer, Coal India Ltd, is setting up its first overseas trading office in Singapore, aiming to diversify into trading iron ore and critical and strategic minerals, two sources said.

Indian Oil Corp, the country's top refiner, has finalised a deal with Algeria's Sonatrach to import liquefied petroleum gas (LPG) in 2027, three trade sources aware of the matter said.

Mauritius said on Thursday that it had signed agreements with India's government to import oil products, saying they were part of a "long-term supply arrangement" though it did not disclose the volumes involved or other commercial and financial terms.