



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,576.60	211.75	0.87	8.37	-6.00
BSE Sensex	79,273.33	753.03	0.96	8.39	-6.94
Bank Nifty	57,371.45	789.1	1.39	11.51	-3.92
Nifty Midcap 100	60,086.70	295.95	0.49	11.65	-1.09
Nifty Smallcap 100	17,641.50	154.6	0.88	12.30	-0.36
S&P 500	7,064.01	-45.13	-0.63	7.43	3.00
DJIA	49,149.38	-293.18	-0.59	5.55	1.59
Nasdaq 100	26,479.47	-110.87	-0.42	10.24	5.05
Nikkei 225	59,349.17	524.28	0.89	10.44	14.50
Hang Seng	26,487.48	126.41	0.48	4.72	0.57
Shanghai Com	4,085.08	2.95	0.07	3.46	1.53

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,576.60	57,371.45
Support	24,417 & 24,358	56,884 & 56,705
Resistance	24,605 & 24,663	57,465 & 57,644

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,033.17	13,033.17	-1,918.99
DII Cash Market	18,366.67	16,145.40	2,221.27

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Nestle	1379.90	7.27	9586.52
HUL	2310.70	3.55	3217.28
Trent	4390.50	3.48	2438.07
ICICI Bank	1388.40	2.37	23312.46
Bajaj Finance	938.85	2.30	6713.98
Top Losers			
SBI Life Insurance	1911.60	-3.58	5153.62
Bharat Elec	451.50	-1.32	13492.13
Jio Financial	234.75	-1.01	46344.62
Dr Reddys Labs	1220.60	-0.97	1230.73
Titan Company	4479.70	-0.74	656.11

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	98.70	3.35	62.47
WTI (USD/bbl)	92.01	2.68	60.52
Gold Spot (USD/t oz.)	4,701.37	-2.47	8.52
USD/INR	93.50	-0.40	3.93
10 Year G-Sec India	6.889	-0.02	4.67
US 10 Year Bond	4.287	-0.12	2.87

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equity indexes closed at six-week highs on Tuesday, with bank shares rising on earnings confidence and a partial easing of rupee trading limitations. Prospects of US-Iran talks also contributed.

Global

US stocks closed lower on Tuesday, with early gains evaporating as renewed concerns about the Middle East war outweighed initial optimism over a round of solid corporate earnings.

Japan's Nikkei share average closed higher as optimism grew from reports that Tehran is considering attending peace talks with Washington in Pakistan, lifting risk appetite and prompting investors to buy domestic heavyweight tech stocks.

China's stock markets moved slightly higher, with the Shanghai Composite Index rising 0.07% to 4,085.08, while the Shenzhen Component Index gained 0.10% to 14,982.14, remaining near multi-year highs.

Commodities & Currency :

The Indian rupee logged its steepest fall in a week, tracking weakness in most regional peers and also weighed down by the partial rollback of measures the central bank had undertaken recently to support the strained South Asian currency.

Gold extended losses on Tuesday as a stronger dollar and rising yields weighed on prices, while investors awaited the outcome of tentative US-Iran talks and Federal Reserve Chair nominee Kevin Warsh's confirmation hearing.

News:

India's crude oil imports fell 13% in March from pre-war levels in February, with half coming from Russia, after the US-Israeli conflict with Iran halted Middle Eastern shipments via the Strait of Hormuz, shipping data showed.

Nestle India posted a 26% increase in quarterly profit on Tuesday, benefiting from strong demand for packaged foods, including KitKat chocolates and Maggi instant noodles.

A prolonged disruption in energy supply can widen India's trade deficit and strain the fiscal account of the world's fastest-growing major economy, according to rating agency Moody's.

Raw material costs for plastic used in fast-moving consumer goods, paints and personal care products have surged as much as 40% since the start of the Iran war, a top executive at Indian rigid plastic manufacturer Alternicq said.

India is staring at a severe shortage of solar cells as new rules from June mandate the use of locally made cells, a move that could derail some clean energy projects, an industry organisation said in a letter to the renewable energy ministry.

India's Suzlon Group on Tuesday launched its 5 megawatt (MW) and 6.3 MW wind turbine models in Europe, targeting the continent's repowering and new-build markets.

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