



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,378.10	-198.50	-0.81	7.49	-6.76
BSE Sensex	78,516.49	-756.84	-0.95	7.36	-7.83
Bank Nifty	57,124.45	-247.00	-0.43	11.03	-4.33
Nifty Midcap 100	60,201.60	114.90	0.19	11.86	-0.90
Nifty Smallcap 100	17,840.35	198.85	1.13	13.56	0.77
S&P 500	7,137.90	73.89	1.05	8.56	4.07
DJIA	49,490.03	340.65	0.69	6.28	2.29
Nasdaq 100	26,937.28	457.81	1.73	12.15	6.87
Nikkei 225	59,585.86	236.69	0.40	10.88	14.96
Hang Seng	26,163.24	-324.24	-1.22	3.44	-0.67
Shanghai Com	4,085.08	2.95	0.07	3.46	1.53

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,378.10	57,124.45
Support	24,353 & 24,315	57,022 & 56,919
Resistance	24,488 & 24,516	57,355 & 57,458

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	13,895.07	15,973.43	-2,078.36
DII Cash Market	18,704.25	19,752.42	-1,048.17

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
TATA Cons. Prod	1178.60	3.20	4284.22
HUL	2368.80	2.51	5558.33
NTPC	405.40	2.32	16411.13
Hindalco	1039.90	1.79	4474.18
TMPV	361.85	1.67	14994.31
Top Losers			
HCL Tech	1285.30	-10.82	33066.26
Infosys	1268.60	-3.40	20088.38
M&M	3149.70	-3.01	3096.79
TCS	2538.50	-2.76	5232.05
Tech Mahindra	1462.60	-2.55	11668.80

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	102.01	3.58	67.92
WTI (USD/bbl)	93.04	3.76	62.32
Gold Spot (USD/t oz.)	4,745.32	0.54	9.53
USD/INR	93.80	-0.32	4.26
10 Year G-Sec India	6.923	0.49	5.18
US 10 Year Bond	4.313	0.25	3.51

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 climbed on Wednesday to send the S&P 500 and Nasdaq to closing records, after US President Donald Trump extended the ceasefire with Iran, with a round of solid corporate earnings providing additional support for optimism.

Japan's Nikkei share average rose for a third consecutive session and hit a record closing high on Wednesday, supported by heavily weighted tech stocks, though uncertainty over U.S.-Iran peace talks tempered sentiment.

Hong Kong stocks fell on Wednesday, with other regional markets mixed, as investors navigated the uncertainty of tensions in the Middle East despite the extension of a ceasefire with Iran by US President Donald Trump.

Commodities & Currency :

The Indian rupee fell for the third consecutive session on Wednesday, as optimism about an end to the Iran war remained muted despite the US indefinitely extending a ceasefire.

Gold rose on Wednesday after dropping to more than a one-week low in the previous session on bargain-hunting even as investors await a possible resumption of US-Iranian peace talks.

News:

India's Trent posted a quarterly profit jump of 26% on Wednesday, as demand ticked up following last year's consumption tax cuts, with its board also approving a maiden bonus share issue and a fund raise of up to 25 billion rupees (\$266 million).

India's Tata Communications reported a 9.4% rise in fourth-quarter revenue, supported by demand for cloud infrastructure and high-bandwidth cable services housed under its data services unit.

HCLTech lost \$4.5 billion in market capitalisation on Wednesday after it projected fiscal 2027 revenue growth below estimates, with restrained client spending raising fresh doubts over a recovery in India's \$315 billion IT industry.

Indian IT services company Tech Mahindra posted fourth-quarter revenue that beat analysts' estimates on Wednesday, with six out of its seven segments growing year-on-year.

Indian infrastructure giant Larsen and Toubro said on Wednesday that its green energy unit has signed an agreement with Japanese trading firm ITOCHU Corp for the long-term supply of 300,000 tonnes of green ammonia per annum.

An external panel set up by India's market regulator has recommended that the National Stock Exchange of India settle pending legal disputes by paying a little over 18 billion Indian rupees (\$192.5 million), two sources with direct knowledge of the matter said.

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