



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,102.90	89.80	0.37	3.08	-7.82
BSE Sensex	77,094.07	291.17	0.38	3.81	-9.50
Bank Nifty	57,935.60	249.85	0.43	8.00	-2.97
Nifty Midcap 100	62,729.10	211.80	0.34	3.13	3.26
Nifty Smallcap 100	18,897.00	112.55	0.60	5.10	6.73
S&P 500	7,472.78	-27.79	-0.37	-1.31	9.36
DJIA	51,718.16	147.99	0.29	0.95	6.58
Nasdaq 100	30,347.08	-59.11	-0.19	-0.35	20.63
Nikkei 225	72,353.96	1103.9	1.55	8.10	39.59
Hang Seng	23,768.52	-156.29	-0.65	-6.42	-9.76
ShanghaiCom	4,163.10	72.62	1.78	2.60	3.47

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,102.90	57,935.60
Support	24,078 & 24,056	57,778 & 57,710
Resistance	24,151 & 24,173	57,999 & 58,0667

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,082.08	10,717.99	-635.91
DII Cash Market	17,391.78	16,356.06	1,035.72

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1415.70	4.73	3368.85
Tech Mahindra	1435.20	1.82	2165.31
Dr Reddys Labs	1290.70	1.46	1618.25
Sun Pharma	1862.90	1.34	1588.76
Infosys	1065.40	1.33	10178.51
Top Losers			
Asian Paints	2674.00	-2.16	1033.48
Titan Company	4372.50	-1.07	390.84
Nestle	1401.90	-0.91	1481.21
Shriram Finance	992.85	-0.90	4287.22
Power Grid Corp	289.75	-0.86	11678.41

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	77.48	-3.84	27.54
WTI (USD/bbl)	74.64	-2.56	30.22
Gold Spot (USD/t oz.)	4,183.12	0.66	-3.44
USD/INR	94.68	-0.37	5.24
10 Year G-Sec India	6.87	-0.16	4.43
US 10 Year Bond	4.503	-0.16	6.60

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities rose on Monday, led by Reliance Industries following its annual general meeting and a rebound in IT sectors. Improved optimism from Middle East peace talks and lower oil prices also supported a broader risk appetite. GIFT Nifty futures were trading at 24,130.5 as of 7:50 am, indicating the Nifty 50 could open near Monday's close of 24,102.9.

Global

The S&P 500 and the Nasdaq closed down on Monday, dragged by declines in the megacap technology stocks including Alphabet, while investors assessed developments in US-Iran negotiations.

Japan's Nikkei share gauge surged past the 72,000 mark for the first time on Monday, on continued euphoria over AI investment and some progress in the US-Iran peace talks.

A gauge of Chinese stocks in Hong Kong edged toward a bear market as trading resumed after the holiday, weighed by weak consumption data and investors chasing AI shares elsewhere.

Commodities & Currency :

The Indian rupee snapped a six-day-long run of gains on Monday, as the dollar hovered near a one-year peak against a basket of peers even as a retreat in oil prices soothed worries over spillovers from the U.S.-Iran war.

Gold firmed on Monday, recovering from an over one-week low hit in the previous session, as progress in US-Iran peace talks weighed on oil prices and tempered some inflation concerns.

News:

The top US trade diplomat will visit India on Tuesday for two-day talks, with India pushing for a trade pact on terms better than those for other Asian economies as both countries seek to close a deal crucial to mending strained ties.

The Indian government is in talks with the UAE to sell some of its flagship defence systems, including the supersonic cruise missile BrahMos, four Indian sources said, as the Gulf nation steps up arms procurement following the war in the Middle East.

India, once the world's second-largest sugar exporter, is expected to have little surplus for export for at least three more seasons as El Nino weather conditions threaten cane production and rising ethanol demand squeezes supply.

Sun Pharmaceutical Industries on Saturday said it will acquire 100% of Innovcare Lifesciences in a deal valued at about 2.71 billion rupees (\$28.73 million).

Three Indian-flagged tankers carrying more than 860,000 metric tons of oil and 94 Indian crew members have safely transited the Strait of Hormuz and are en route to India, shipping minister Sarbananda Sonowal said on Saturday.

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