

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
<b>Global</b>					
Nifty 50	23,114.50	112.35	0.49	-7.04	-11.60
BSE Sensex	74,532.96	325.72	0.44	-7.11	-12.51
Bank Nifty	53,427.05	-23.95	-0.04	-10.72	-10.52
Nifty Midcap 100	54,855.50	363.20	0.67	-5.71	-9.70
Nifty Smallcap 100	15,718.60	14.35	0.09	-5.49	-11.22
S&P 500	6,506.48	-100.01	-1.51	-5.45	-5.13
DJIA	45,577.47	-443.96	-0.96	-6.80	-5.80
Nasdaq 100	23,898.15	-457.13	-1.88	-4.38	-5.19
Nikkei 225	53,372.53	NA	NA	-8.07	2.97
Hang Seng	25,277.32	-223.26	-0.88	-3.00	-4.03
Shanghai Com	3,957.05	-49.50	-1.24	-5.39	-1.65

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,114.50	53,427.05
Support	23,070 & 23,004	53,288 & 53,032
Resistance	23,282 & 23,347	54,117 & 54,373

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	28,496.17	34,014.56	-5,518.39
DII Cash Market	22,938.31	17,232.08	5,706.23

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
JSW Steel	1169.60	3.42	3580.08
TECH Mahindra	1384.80	3.30	3397.02
TATA Steel	196.77	3.29	46881.26
COAL India	468.15	3.07	23878.65
Infosys	1255.90	2.88	27299.98
<b>Top Losers</b>			
Hindalco	874.25	-2.54	10063.64
HDFC Bank	780.45	-2.22	103129.47
HDFC LIFE	623.65	-1.55	3012.02
ONGC	265.40	-1.37	19436.12
Shriram Finance	938.60	-1.18	28550.63

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	112.19	3.26	84.67
WTI (USD/bbl)	98.32	2.80	71.53
Gold Spot (USD/t oz.)	4,492.42	-3.39	3.70
USD/INR	93.71	-1.14	4.16
10 Year G-Sec India	6.737	0.06	2.36
US 10 Year Bond	4.380	3.07	5.10

Source: Bloomberg

## MARKET COMMENTARY

### Equity:

#### India

The Indian stock market rebounded on Friday after a steep mid-week decline, lifted by easing investor concerns as crude oil prices fell.

#### Global

The S&P 500 fell 1.5% on Friday, while the Nasdaq 100 slid 1.8% to a six-month low and the Dow Jones declined 0.8% to a four-month low, as escalating tensions in the Middle East and rising energy prices weighed on markets.

Japan's stock market was closed on Friday, limiting trading activity for the week.

In China, the Shanghai Composite fell 1.24% to 3,957 and Hang Seng fell 0.9% to 25,277 on Friday, with both indexes posting steep weekly losses as concerns over the economic and inflationary fallout from the Iran war and rising energy prices pressured sentiment.

### Commodities & Currency:

The Indian rupee breached ₹93 per U.S. dollar for the first time, falling over 1% to about ₹93.74 in its worst single-day drop in more than four years. The sharp slide was driven by concerns that the Iran war and resulting energy-supply disruptions will raise import costs and pressure India's economy.

Gold prices fell on Friday as a stronger U.S. dollar weighed on the metal, following reports that the U.S. will deploy additional troops to the Middle East. The move heightened worries over rising oil prices and inflation, reinforcing expectations of prolonged higher interest rates.

### News:

India and African nations are strengthening energy ties, focusing on grid planning, innovative financing, and collaboration to accelerate energy transition projects.

Alkem Laboratories has launched semaglutide in India at an affordable price of about ₹450 per week, aiming to tap into the rapidly growing diabetes and weight-loss drug market.

CMPDIL's IPO, a subsidiary of Coal India, saw a modest start with about 7% subscription on Day 1, reflecting cautious investor sentiment.

The Indian Navy will commission its new stealth frigate INS Taragiri on April 3, 2026, adding an advanced, indigenously built warship with modern weaponry and enhanced stealth features to its fleet.

Dubai's real estate market is showing early signs of slowdown amid the West Asia crisis, with falling transaction volumes and price discounts at some properties, as investor sentiment weakens.

The Panama Canal is operating at full capacity as LNG shipments surge due to Strait of Hormuz disruptions amid the Iran war, with global exporters rerouting cargo and reinforcing the canal's role as a key energy transit route.

Indian refiners are preparing to resume purchases of Iranian crude after the US temporarily eased sanctions to address an energy shortage, with other Asian refiners exploring similar options.

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