



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,824.10	-278.80	-1.16	1.89	-8.88
BSE Sensex	76,200.68	-893.39	-1.16	2.60	-10.55
Bank Nifty	57,183.75	-751.85	-1.30	6.60	-4.23
Nifty Midcap 100	62,070.35	-658.75	-1.05	2.04	2.17
Nifty Smallcap 100	18,805.90	-91.10	-0.48	4.59	6.22
S&P 500	7,365.46	-107.33	-1.44	-3.09	7.39
DJIA	51,666.84	-45.87	-0.09	1.15	6.79
Nasdaq 100	29,347.27	-999.81	-3.29	-3.82	16.43
Nikkei 225	69,788.38	-2565.58	-3.55	4.26	34.64
Hang Seng	23,336.28	-432.24	-1.82	-8.12	-11.40
ShanghaiCom	4,106.25	-56.85	-1.37	1.20	2.06

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,824.10	57,183.75
Support	23,781 & 23,698	57,070 & 56,859
Resistance	24,049 & 24,131	57,752 & 57,963

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	15,396.07	15,378.21	17.86
DII Cash Market	16,863.04	16,182.83	680.21

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1433.10	1.23	4958.07
Dr Reddys Labs	1301.30	0.82	2878.80
Power Grid Corp	291.95	0.76	12328.52
Axis Bank	1363.50	0.36	5745.85
Sun Pharma	1868.00	0.27	2812.24
Top Losers			
Infosys	1029.30	-3.39	19323.06
TCS	2059.60	-3.21	6392.74
Adani Enterprise	2962.90	-3.16	1620.66
Wipro	174.49	-3.16	23954.73
JSW Steel	1242.20	-3.13	2156.62

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	77.23	-0.86	27.13
WTI (USD/bbl)	73.32	-0.73	27.91
Gold Spot (USD/t oz.)	4,124.19	-1.57	-4.80
USD/INR	94.74	-0.06	5.30
10 Year G-Sec India	6.87	-0.09	4.34
US 10 Year Bond	4.466	-0.49	7.48

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

The Nasdaq and the S&P 500 closed at more than one-week lows on Tuesday, dragged down by sharp losses in semiconductor stocks as investors scrutinized growing debt-funded AI spending and braced for a more hawkish US Federal Reserve.

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.

Japanese equities closed sharply lower on Tuesday, with investors booking profits after a strong rally in semiconductor and artificial intelligence-related stocks.

Mainland China and Hong Kong stock markets experienced declines, closely mirroring the downward trends observed among regional peers. This market volatility is largely attributed to the growing speculation around an impending Federal Reserve interest rate increase.

Commodities & Currency :

The Indian rupee ended modestly weaker on Tuesday as a churn in US rate expectations boosted the dollar to a one-year peak against a basket of peers, driving global equities lower and pressuring Asian currencies.

Gold prices fell on Tuesday as the US dollar hit a one-year high on increased expectations of a Federal Reserve rate hike, outweighing support from softer oil prices amid progress in US-Iran talks.

News:

India's private sector expanded at its slowest pace in three months in June as weaker demand growth weighed on both factory and services activity, while business confidence slipped to its lowest level since January, a survey showed.

India's imports of liquefied petroleum gas (LPG) from the US are set to top 1 million metric tons in June, a record high, industry sources said, as New Delhi turned to costlier suppliers to offset disruption from the Middle East.

India's Tata Motors Passenger Vehicles said on Tuesday it aims to nearly double its revenue and sales volumes by fiscal 2031, banking on electric and gas-powered vehicles, as it seeks to capture a 20% share of the world's third-largest car market.

Meta Platforms will invest \$900 million in Indian fintech startup CRED, valuing it at \$4.5 billion, while tapping CRED's founder Kunal Shah to head WhatsApp globally, the companies said

Kotak Mahindra Bank is looking for acquisitions, including loan portfolios, while further expanding into alternative assets and other non-banking businesses, its chief executive said, as the Indian lender looks to deploy excess capital to drive growth.

The United States is focused on securing a fair, reciprocal trade deal with India that opens markets for American exporters and delivers benefits to both countries, the US Embassy in India said in an X post.

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