

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,512.65	-601.85	-2.60	-9.46	-13.90
BSE Sensex	72,696.39	-1836.57	-2.46	-9.40	-14.66
Bank Nifty	51,437.75	-1989.3	-3.72	-14.04	-13.86
Nifty Midcap 100	52,717.55	-2137.95	-3.90	-9.39	-13.22
Nifty Smallcap 100	15,098.70	-619.9	-3.94	-9.22	-14.72
S&P 500	6,581.00	74.52	1.15	-4.37	-4.05
DJIA	46,208.47	631.00	1.38	-5.51	-4.49
Nasdaq 100	24,188.59	290.44	1.22	-3.22	-4.04
Nikkei 225	51,515.49	-1857.04	-3.48	-11.27	-0.61
Hang Seng	24,382.47	-894.85	-3.54	-6.44	-7.43
Shanghai Com	3,813.28	-143.77	-3.63	-8.83	-5.22

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,512.65	51,437.75
Support	22,466 & 22,377	51,296 & 50,980
Resistance	22,757 & 22,847	52,321 & 52,638

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,330.98	20,745.21	-10,414.23
DII Cash Market	25,952.98	13,919.01	12,033.97

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1358.60	1.87	5166.41
Power Grid Corp	302.10	1.51	23771.66
Infosys	1256.80	0.07	12420.29
ONGC	265.45	0.02	23991.58
Top Losers			
Shriram Finance	877.70	-6.49	10556.87
Titan Company	3853.10	-6.17	1533.65
Trent	3356.70	-5.70	959.71
Jio Financial	226.10	-5.52	21172.07
UltraTechCement	10362.00	-5.23	644.39

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	98.77	-11.96	62.83
WTI (USD/bbl)	87.28	-11.14	52.30
Gold Spot (USD/t oz.)	4,459.35	-0.74	2.93
USD/INR	93.98	-0.29	4.46
10 Year G-Sec India	6.838	1.50	3.89
US 10 Year Bond	4.376	0.78	5.01

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, Indian shares and the rupee slid to 93.98 against the US dollar, following drops across Asia as the Middle East crisis fuelled fears about global growth and high oil costs. Indian shares set for positive start as Trump postpones Iran grid strike, GIFT Nifty futures were trading at 22,862, as of 7:48 am, indicating that the benchmark Nifty 50 may open about 1.6% higher from Monday's close.

Global

Wall Street's main stock indexes closed up more than 1% on Monday as oil prices fell after President Donald Trump said he had ordered the military to postpone strikes against Iranian power plants following "productive conversations" with Tehran.

Japan's stocks and bonds sank to multi-month lows on Monday as an escalation in the Middle East war stoked inflation fears and concerns over an economic slowdown.

Hong Kong stocks slumped by the most in nearly a year alongside other Asian markets on Monday as investors moved to price in tighter monetary policy, with Middle East tensions showing no sign of easing.

Commodities & Currency :

The Indian rupee fell to a record low on Monday, pressured by a sustained rise in oil prices and mounting worries that the Middle East conflict could prolong energy-supply disruptions.

Gold trimmed losses to recover from a four-month low on Monday after US President Donald Trump postponed strikes on Iranian infrastructure, but prices were still down for a ninth straight session as bets on higher rates dimmed the metal's appeal.

News:

The fundamentals of the Indian economy are strong and the country has adequate availability of petroleum, fertilisers and coal to weather trade and energy disruptions caused by the US-Israeli war on Iran, Prime Minister Narendra Modi said on Monday.

India has proposed amendments to its company's law to allow some firms to undertake two share buybacks in a year from only one earlier, and to simplify procedures for "fast-track" mergers and acquisitions.

Two Indian-flagged liquefied petroleum gas (LPG) tankers on Monday sailed through the Strait of Hormuz although overall traffic through the critical waterway remained blocked, according to data and sources.

India's Directorate General of Trade Remedies, a body under the trade ministry, has recommended anti-dumping duties ranging from \$386 to \$1,071 per metric ton on imports of viscose rayon filament yarn from China, a government notification said on Monday.

Reliance Jio Platforms is gearing up to file papers seeking regulatory approvals for a Mumbai listing, in what is likely to be the biggest-ever stock offering in the country.

The Reserve Bank of India purchased \$2.52 billion in the foreign exchange market on a net basis in January, marking its first such purchase in eight months, even as the rupee continued to face headwinds at the time.

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