AJCONGLOBAL
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Daily Market Insight

~ Where the market left its footprints

25th August 2026

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	**24,219.05**	**-32.95**	**-0.14**	**-2.24**	**-7.37**
BSE Sensex	**77,369.11**	**-171.72**	**-0.22**	**-1.61**	**-9.18**
Bank Nifty	**57,525.95**	**-236.00**	**-0.41**	**-1.24**	**-3.66**
Nifty Midcap 100	**63,817.25**	**81.50**	**0.13**	**0.22**	**5.05**
Nifty Smallcap 100	**19,926.75**	**-51.00**	**-0.26**	**1.72**	**12.55**
S&P 500	**7,652.86**	**-21.51**	**-0.28**	**0.69**	**11.90**
DJIA	**53,422.35**	**140.03**	**0.26**	**0.45**	**10.12**
Nasdaq 100	**29,023.18**	**-285.68**	**-0.97**	**0.26**	**16.28**
Nikkei 225	**65,528.09**	**-488.27**	**-0.74**	**2.78**	**26.42**
Hang Seng	**25,517.33**	**-492.13**	**-1.89**	**-1.89**	**-3.12**
ShanghaiCom	**3,882.01**	**-23.20**	**-0.59**	**1.90**	**-3.51**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	**24,219.05**	**57,525.95**
Support	24,161 & 24,121	57,309 & 57,161
Resistance	24,290 & 24,330	57,788 & 57,936

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,332.64	11,150.98	**1,181.66**
DII Cash Market	15,337.18	12,843.77	**2,493.41**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
JSW Steel	1327.00	**2.57**	3648.21
Hindalco	1058.50	**2.37**	4052.16
Tata Steel	186.30	**1.80**	37800.94
HCL Tech	1322.00	**1.50**	1091.65
Dr Reddys Labs	1190.00	**1.30**	2248.63
Top Losers			
SBI Life Insura	1761.80	**-1.73**	542.31
Adani Ports	1077.00	**-1.64**	4342.56
Bajaj Finance	1672.10	**-1.64**	1061.25
Bajaj Finserv	2001.70	**-1.52**	464.01
Bharat Elec	409.00	**-1.21**	9480.78

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	93.01	**-1.44**	**53.12**
WTI (USD/bbl)	85.49	**-1.84**	**49.15**
Gold Spot (USD/t oz.)	4,664.74	**1.34**	**7.67**
USD/INR	95.75	**-0.04**	**6.42**
10 Year G-Sec India	6.87	**0.31**	**4.39**
US 10 Year Bond	4.715	**0.23**	**12.64**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares fell on Monday, tracking subdued global markets, as investors stayed cautious ahead of the release of details about likely US sanctions on Iran.

Global

The S&P 500 and Nasdaq ended lower, pulled down by technology stocks, as investors weighed fresh US economic pressure against Iran and braced for a week that includes Nvidia earnings and a closely watched inflation report

Japanese stocks ended lower, with the Nikkei 225 falling 0.7% to 65,528. The decline extended the previous sessions losses as technology and AI-related shares came under pressure ahead of Nvidias earnings report later this week.

Chinese stocks ended lower, with technology shares leading a broad market selloff. The Shanghai Composite fell 0.59% to 3,882, while the Shenzhen Component dropped 2.13% to 13,794.3. Both indexes closed at their lowest levels in nearly three weeks.

Commodities & Currency:

The Indian rupee tip-toed through another lacklustre trading session on Monday as persistent central bank intervention kept the currency trapped in a thin band while investors awaited details of threatened US sanctions on Iran.

Gold prices rose to their highest in more than three months on Monday, as technical buyers piled into a rally driven by the U.S. Treasury's recent buyback announcement and a weaker dollar ahead of this week's inflation data and the Jackson Hole Symposium.

News:

Planned new US sanctions on Iran and the UAE's halt on Tehran trade could severely disrupt Indian exports of rice, tea and pharmaceuticals to Iran, which have been largely routed through Dubai's port in recent years, Indian exporters said.

India will launch tokenised corporate bonds next month, as it tests the use of blockchain technology to enable instant settlement of bond transactions, three sources with direct knowledge of the matter said.

India has enough sugar stocks to meet festival-season demand, with a record price rally driven by speculative buying rather than any real supply shortfall, the head of the country's top sugar industry body said.

Tata Consultancy Services will buy Porsche AG's automotive and consulting unit MHP, the IT major said on Monday, as part of a wider partnership under which Porsche has committed €1.25 billion ($1.46 billion) for the Indian firm and MHP.

Indian Foreign Minister S. Jaishankar told Russian President Vladimir Putin on Monday that the economic cooperation between the two countries has grown very significantly.

India's Godrej Industries group said it has signed a pact with the government of Haryana to invest 200 billion rupees ($2.09 billion) in the northern state, expanding its presence in the region.