

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	22,912.40	399.75	1.78	-7.86	-12.37
BSE Sensex	74,068.45	1372.06	1.89	-7.69	-13.05
Bank Nifty	52,605.65	1167.9	2.27	-12.09	-11.90
Nifty Midcap 100	54,087.00	1369.45	2.60	-7.04	-10.97
Nifty Smallcap 100	15,495.20	396.50	2.63	-6.84	-12.48
S&P 500	6,556.37	-24.63	-0.37	-4.73	-4.40
DJIA	46,124.06	-84.41	-0.18	-5.69	-4.67
Nasdaq 100	24,002.45	-186.14	-0.77	-3.96	-4.78
Nikkei 225	52,252.28	736.79	1.43	-10.00	0.81
Hang Seng	25,063.71	681.24	2.79	-3.82	-4.84
Shanghai Com	3,881.28	68.00	1.78	-7.20	-3.53

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	22,912.40	52,605.65
Support	22,699 & 22,597	52,032 & 51,767
Resistance	23,030 & 23,132	52,889 & 53,154

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,406.90	20,416.46	-8,009.56
DII Cash Market	21,126.99	15,259.84	5,867.15

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
<b>Top Gainers</b>			
L&T	3516.80	5.22	6037.85
Interglobe Avi	4150.80	5.21	2152.98
Eternal	237.94	4.84	63944.92
Asian Paints	2217.30	4.53	1561.02
Bajaj Finance	849.00	4.48	18828.25
<b>Top Losers</b>			
Coal India	442.10	-2.89	20320.75
Power Grid Corp	299.00	-1.03	24123.62
Adani Enterprise	1817.90	-0.82	11211.38
Sun Pharma	1753.30	-0.29	2040.15
Cipla	1219.40	-0.20	853.05

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	104.02	4.08	71.75
WTI (USD/bbl)	91.86	4.26	60.52
Gold Spot (USD/t oz.)	4,394.84	-0.28	1.44
USD/INR	93.88	0.11	4.34
10 Year G-Sec India	6.868	0.44	4.35
US 10 Year Bond	4.348	-0.32	4.34

Source: Bloomberg

## MARKET COMMENTARY

### Equity :

#### India

On Tuesday, Indian stocks joined a worldwide rise following the United States. The bombing of Iran's electrical grid has been postponed due to confusing signals about talks between the two sides. Meanwhile, HDFC Bank's comeback has lifted benchmarks.

#### Global

Wall Street indexes fell in Tuesday's volatile session as investors swayed between fears of rising oil prices and hopes for a resolution to the US-Israeli war on Iran as US President Trump claimed there were talks even as reports suggested that more American troops were headed to the Middle East.

Japanese shares pared gains on Tuesday as investors remained unconvinced that US President Donald Trump's comments about holding off on targeting Iran's energy infrastructure would lead to a breakthrough in the Middle East conflict.

Hong Kong stocks rebounded on Tuesday on signs of a de-escalation of the US-Israel war against Iran after President Donald Trump said he would delay any attacks on the Gulf nation's energy facilities.

### Commodities & Currency :

The Indian rupee paused a three-day run of hitting record lows to nudge higher on Tuesday as traders parsed dissonant signals emanating from Washington and Tehran about a potential resolution to the conflict in the Middle East.

Gold prices extended their decline on Tuesday; weighed down by persistent Middle East tensions that fanned worries of inflation and expectations of higher interest rates globally.

### News:

India's Reliance Industries operator of the world's biggest refining complex, has purchased 5 million barrels of Iranian crude, days after the US temporarily removed sanctions on the oil, three sources familiar with the matter said on Tuesday.

India's private sector expanded at its weakest pace in over three years in March as price shocks from the US-Israeli war on Iran dampened domestic demand, yet international orders hit a record high, a survey showed on Tuesday.

NeuEN Green Energy, a joint venture between Indian refiner BPCL and a unit of Singapore's Sembcorp Industries will supply 10,000 tonnes per annum green hydrogen to Numaligarh Refinery, the companies said, at a record low price.

India's imports of iron ore, a key raw material in steelmaking, are set to rise to a seven-year high in the fiscal year ending on March 31, driven by a shortage of high-grade ore and demand from JSW Steel analysts and industry executives said.

India's drug regulator has tightened surveillance against the unauthorised sale and promotion of weight-loss drugs, the health ministry said on Tuesday, after local drugmakers launched cheaper generic versions of Ozempic and Wegovy over the weekend.

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