

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,482.50	57.85	0.23	2.65	-2.54
BSE Sensex	82,276.07	50.15	0.06	1.92	-3.42
Bank Nifty	61,043.35	-3.95	-0.01	4.50	2.23
Nifty Midcap 100	59,406.10	339.75	0.58	4.00	-2.21
Nifty Smallcap 100	17,118.70	160.05	0.94	4.27	-3.31
S&P 500	6,946.13	56.06	0.81	-0.43	1.28
DJIA	49,482.15	307.65	0.63	0.15	2.27
Nasdaq 100	25,329.04	352.00	1.41	-1.59	0.49
Nikkei 225	58,583.12	1262.03	2.20	11.26	13.02
Hang Seng	26,765.72	175.4	0.66	-0.04	1.62
Shanghai Com	4,147.23	29.82	0.72	3.27	3.08

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,482.50	61,043.35
Support	25,288 & 25,150	60,855 & 60,655
Resistance	25,602 & 25,779	61,204 & 61,354

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	30,369.48	27,377.84	2,991.64
DII Cash Market	18,346.49	13,227.92	5,118.57

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
HCL Tech	1378.20	2.91	5703.51
Bajaj Auto	10097.00	2.73	334.37
Tata Steel	214.64	2.63	48873.84
Shriram Finance	1085.90	2.28	3115.58
Adani Enterprise	2231.70	2.23	1474.19
Top Losers			
Reliance	1398.50	-2.12	10728.79
SBI	1200.10	-1.90	19581.10
Adani Ports	1528.70	-1.72	2153.98
Eternal	250.20	-1.50	103388.32
Bharti Airtel	1913.40	-1.42	8285.20

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	71.07	0.59	16.99
WTI (USD/bbl)	65.73	0.15	14.58
Gold Spot (USD/t oz.)	5,207.42	1.24	20.20
USD/INR	90.96	0.00	1.10
10 Year G-Sec India	6.678	-0.05	1.46
US 10 Year Bond	4.035	-0.42	-3.18

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indexes closed modestly higher on Wednesday, as IT stocks recovered some of their losses from the previous session and metals climbed, outweighing a decline in index heavyweight Reliance and state-owned lenders. The Gift Nifty futures were trading at 25,676 points as of 8:00 am, indicating the benchmark Nifty 50 will open above Wednesday's close of 25,482.5.

Global

Wall Street ended higher on Wednesday, extending its tech-led rally and touching two-week highs as worries over artificial intelligence disruption and costs took a back seat to renewed optimism over the nascent technology's potential benefits.

The Nikkei stock index ended at a record high above 58,000 on Wednesday, as speculation about further interest rate hikes by the Bank of Japan receded after the government's nomination of two new BOJ policymakers.

Hong Kong stocks rose in a relief rally on Wednesday, taking cues from a rebound in global tech stocks as concerns about disruption by artificial intelligence receded.

Commodities & Currency :

The Indian rupee ended nearly flat on Wednesday as dollar demand spurred by maturing contracts in the non-deliverable forwards market blunted positive impulses from modest inflows and gains in Asian peers.

Gold gained on Wednesday as investors moved into safe havens on concerns that tariffs could stoke inflation, while ongoing tensions between Iran the United States also kept bids for safety intact.

News:

Stocks of Indian solar equipment makers plunged on Wednesday, after the United States imposed preliminary duties on imports from India, Indonesia and Laos, the latest in a decade-long series of levies on cheap Asian imports.

Indian drugmaker Dr Reddy's Laboratories is likely to launch its generic semaglutide injection in the country in March under the brand name Obeda, according to two people familiar with the matter as well as images reviewed by Reuters.

India's Vedanta is set to raise 30 billion rupees (\$329.89 million) through a sale of shorter-duration bonds before the end of March, in its second bond issue in the current fiscal year, two sources aware of the matter said on Wednesday.

Indian shares have lagged their Asian and emerging market peers so far in February, pressured by a \$68.6 billion rout in the market value of information technology stocks, as investors fretted over disruptions linked to artificial intelligence.

Bharat Electronics Ltd received additional orders of Rs.733 crore since its last disclosure, according to an exchange filing from the company on Wednesday.

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