

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,897.95	-275.10	-1.14	5.37	-8.60
BSE Sensex	76,664.21	-999.79	-1.29	4.83	-10.01
Bank Nifty	56,089.75	-215.25	-0.38	9.02	-6.07
Nifty Midcap 100	59,374.80	-578.00	-0.96	10.32	-2.26
Nifty Smallcap 100	17,567.20	-153.55	-0.87	11.82	-0.78
S&P 500	7,165.08	56.68	0.80	8.97	4.47
DJIA	49,230.71	-79.61	-0.16	5.72	1.75
Nasdaq 100	27,303.67	521.04	1.95	13.67	8.32
Nikkei 225	59,716.18	575.95	0.97	11.12	15.21
Hang Seng	25,978.07	62.87	0.24	2.70	-1.37
Shanghai Com	4,079.90	-13.35	-0.33	3.33	1.40

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,897.95	56,089.75
Support	23,823 & 23,730	55,829 & 55,661
Resistance	24,122 & 24,215	56,371 & 56,539

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,837.20	18,665.07	-8,827.87
DII Cash Market	21,560.16	16,859.45	4,700.71

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Coal India	456.00	1.19	16441.91
Trent	4297.30	1.08	1622.09
Nestle	1421.30	0.77	3419.42
Hindalco	1048.35	0.67	4526.00
SBI	1101.10	0.63	13774.75
Top Losers			
Infosys	1154.60	-6.93	42078.91
HCL Tech	1203.20	-5.82	10903.52
TCS	2396.90	-4.95	5107.72
Tech Mahindra	1358.50	-4.43	3693.26
Sun Pharma	1620.40	-3.55	9606.13

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	105.05	-0.02	72.92
WTI (USD/bbl)	94.26	-1.66	64.45
Gold Spot (USD/t oz.)	4,719.36	0.54	8.93
USD/INR	94.26	-0.15	4.77
10 Year G-Sec India	6.937	-0.19	5.39
US 10 Year Bond	4.301	-0.55	3.21

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares fell on Friday, posting weekly losses as Middle East tension-linked higher oil prices and a slump in IT stocks after weak forecasts from Infosys and HCLTech dented sentiment. GIFT Nifty futures were trading at 24,143.50 points, as of 8:15 am, indicating that the benchmark Nifty 50 would open about 1% above Friday's close of 23,897.95.

Global

The S&P 500 and Nasdaq hit record closing highs on Friday, bolstered by optimism for possible negotiations between the US and Iran to end their war and a surge in Intel shares that extended the rally in semiconductor stocks.

Japan's Nikkei set a closing record high, capping a third consecutive weekly gain, as enthusiasm over technology sector earnings offset uncertainty over a potential peace deal in the Middle East.

China stocks fell on Friday, as escalating Middle East tensions dented investor sentiment, while DeepSeek's release of a new artificial intelligence model lifted semiconductor shares.

Commodities & Currency :

The Indian rupee declined in all five trading sessions to log its steepest week-on-week loss since September 2022, as worries over the fragility of a US-Iran ceasefire and disrupted energy flows sparked a renewed surge in oil prices.

Gold rose on Friday, but was on track for its first weekly loss in the last five weeks, as lingering inflation concerns and the uncertain state of the US-Iran war kept markets on edge.

News:

Revenue growth for India's top IT firms will stay muted this fiscal year, as gains from artificial intelligence would be blunted with clients cutting spending amid macroeconomic and geopolitical uncertainty, analysts said.

A surge in fossil fuel prices since the Iran war is squeezing polyester suppliers and garment makers across India and Bangladesh, threatening to raise costs for fast-fashion retailers like Zara and H&M.

India's Adani Green is holding back renewable capacity additions due to transmission bottlenecks, despite having the financial and execution capability to build more, a senior executive said on Friday.

Meetings between the Indian delegation that visited Washington this week and US officials were held in a "constructive and positive manner", with market access, non-tariff measures, and technical barriers to trade among the issues taken up, India's trade ministry said on Friday.

India's central bank said on Friday it has cancelled the banking licence issued to Paytm Payments Bank Limited, more than two years after the regulator imposed business curbs over violations, including lapses in customer due diligence.

Reliance Industries missed quarterly profit expectations on Friday, hurt by higher input costs and supply disruptions linked to the Iran war.

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