



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,995.70	-97.00	-0.40	5.80	-8.23
BSE Sensex	76,886.91	-416.72	-0.54	5.13	-9.75
Bank Nifty	55,400.35	-863.95	-1.54	7.68	-7.22
Nifty Midcap 100	60,419.40	171.05	0.28	12.26	-0.54
Nifty Smallcap 100	17,976.10	75.45	0.42	14.43	1.53
S&P 500	7,138.80	-35.11	-0.49	8.57	4.09
DJIA	49,141.93	-25.86	-0.05	5.53	1.57
Nasdaq 100	27,029.01	-276.67	-1.01	12.53	7.23
Nikkei 225	59,917.46	-619.9	-1.02	11.50	15.60
Hang Seng	25,679.78	-245.87	-0.95	1.53	-2.50
Shanghai Com	4,078.64	-7.71	-0.19	3.29	1.37

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,995.70	55,400.35
Support	23,959 & 23,905	55,277 & 55,060
Resistance	24,131 & 24,184	55,935 & 56,141

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,231.50	19,335.24	-2,103.74
DII Cash Market	18,044.05	16,332.04	1,712.01

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
ONGC	301.30	5.39	51575.18
Adani Enterprise	2412.40	3.90	4375.56
Coal India	467.00	3.20	26732.37
Reliance	1388.90	1.69	41027.70
Nestle	1440.00	1.60	4008.10
Top Losers			
Axis Bank	1289.00	-2.66	9939.79
HCL Tech	1196.00	-2.62	6643.30
Interglobe Avi	4442.40	-2.60	1261.88
Maruti Suzuki	12892.00	-2.50	836.68
Shriram Finance	953.25	-2.20	6752.42

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	111.42	2.95	83.41
WTI (USD/bbl)	100.19	3.96	74.79
Gold Spot (USD/t oz.)	4,598.16	-1.79	6.14
USD/INR	94.55	-0.37	5.09
10 Year G-Sec India	6.981	0.56	6.07
US 10 Year Bond	4.346	0.14	4.29

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Tuesday, Indian shares fell due to rising crude costs and pressure on banking companies from the Reserve Bank of India's final credit-loss criteria.

Global

US stocks closed lower on Tuesday, backing away from record closing highs as renewed concerns over the artificial intelligence boom weighed on technology stocks days before five of the sector's most high-profile companies were due to post quarterly results.

Tokyo stocks ended mixed Tuesday, with the Nikkei index falling as investors locked in gains in heavyweight technology shares following recent surges, while the Topix index was firm.

China's stock markets ended slightly lower on Tuesday, as investors stayed cautious amid global tensions.

Commodities & Currency :

The Indian rupee weakened to a near one-month low on Tuesday, pressed by a stubborn rise in oil prices and sustained hedging by local importers against further weakness, underscoring anxiety over the currency's outlook as it nears the 95 per dollar mark.

Gold fell to a near four-week low on Tuesday, on persistent inflation concerns after US President Donald Trump appeared dissatisfied with Iran's latest proposal to end the war, while investors awaited the Federal Reserve's monetary policy meeting this week.

News:

India's secondary aluminium producers, which rely on imported scrap, are facing shortages as the Middle East conflict disrupts supplies and drives up costs that are likely to be passed on to automakers, industry executives said.

Maruti Suzuki India plans to invest \$1.48 billion to expand manufacturing capacity in the world's third-largest car market, betting on demand for small cars despite mounting risks from the Iran war.

Indian online delivery firm Eternal posted better-than-expected quarterly profit, supported by continued expansion in its quick-commerce business and steady growth in its core food delivery unit.

India's economic growth outlook is broadly unchanged despite the US-Israeli war with Iran, according to a Reuter's poll of economists who warned that data won't capture an already-notable hit to the country's vast informal sector.

A court in the southern Indian state of Karnataka has temporarily blocked new, tougher penalties for solar and wind power producers for deviating from scheduled grid supply after industry bodies challenged the rules.

Snabbit, an Indian on-demand home services platform, said on Tuesday that it has raised \$56 million in a funding round led by Susquehanna Venture Capital, Mirae Asset Venture Investments, and Bertelsmann India Investments.

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