

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,177.65	181.95	0.76	6.61	-7.53
BSE Sensex	77,496.36	609.45	0.79	5.96	-9.03
Bank Nifty	55,403.60	3.25	0.01	7.69	-7.21
Nifty Midcap 100	60,376.90	-42.50	-0.07	12.18	-0.61
Nifty Smallcap 100	18,093.15	117.05	0.65	15.17	2.19
S&P 500	7,135.95	-2.85	-0.04	8.53	4.05
DJIA	48,861.81	-280.12	-0.57	4.93	0.99
Nasdaq 100	27,186.98	157.97	0.58	13.18	7.86
Nikkei 225	59,917.46	-619.9	-1.02	11.50	15.60
Hang Seng	26,111.84	432.06	1.68	3.23	-0.86
Shanghai Com	4,107.51	28.88	0.71	4.03	2.09

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,177.65	55,403.60
Support	24,086 & 24,021	55,285 & 55,075
Resistance	24,296 & 24,361	55,964 & 56,173

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,271.22	16,739.64	-2,468.42
DII Cash Market	17,232.28	14,970.11	2,262.17

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
ITC	316.25	3.88	31199.04
Tech Mahindra	1459.80	3.67	3334.78
Maruti Suzuki	13257.00	2.83	754.80
Coal India	479.90	2.76	18063.86
Reliance	1425.40	2.63	30542.14
Top Losers			
Interglobe Avi	4345.20	-2.19	1695.80
Dr Reddys Labs	1329.80	-1.83	4545.84
NTPC	401.30	-1.36	11920.84
ICICI Bank	1281.00	-0.85	11716.03
Bajaj Finserv	1764.20	-0.83	699.79

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	118.96	6.92	95.82
WTI (USD/bbl)	107.10	7.18	86.85
Gold Spot (USD/t oz.)	4,550.23	-1.01	5.03
USD/INR	94.85	-0.32	5.43
10 Year G-Sec India	6.993	0.17	6.24
US 10 Year Bond	4.420	-0.23	6.06

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, Indian stocks rose after quarterly earnings, but higher Brent crude prices were countered by news that the US may extend its embargo of Iranian ports, preventing further gains. GIFT Nifty futures were trading at 24,119.50 points, as of 8:11 am, indicating that the benchmark Nifty 50 would open below Wednesday's close of 24,177.65.

Global

Wall Street oscillated on Wednesday, as investors juggled spiking crude prices, the US Federal Reserve's interest-rate decision, and a quartet of high-profile earnings released after the closing bell.

Chinese stock markets moved higher on Wednesday, helped by gains in large companies and upbeat earnings. The Shanghai Composite Index rose 0.71% to 4,108, its highest level in over a month, while the Shenzhen Component Index jumped 1.96% to 15,121.

Commodities & Currency :

The Indian rupee fell to a record closing low on Wednesday, pressured by rising oil prices as efforts to end the Iran conflict remained stalled, while persistent foreign selling of Indian assets added to the strain.

Gold extended losses to fall to a one-month low on Wednesday as the US Federal Reserve kept rates unchanged as expected and traders were concerned about inflation stemming from the war in the Middle East.

News:

India's economy remains resilient but faces mounting risks from the Middle East conflict, which has disrupted supplies of energy, fertilisers and industrial raw materials, raised costs and weakened trade, the government's monthly economic report said on Wednesday.

India's Bajaj Finance posted a 22% rise in fourth-quarter profit on Wednesday, helped by lower bad loan provisions and steady loan growth.

Indian metals-to-oil conglomerate Vedanta reported a 92.3% jump in quarterly profit on Wednesday, helped by strong base metal prices that boosted margins.

India's industrial output expanded 4.1% in March, its slowest pace in five months, as softer factory output and weak power generation weighed on growth, government data showed on Tuesday, amid worries over the Middle East conflict.

Shares of Maruti Suzuki India gained as much as 5.1% on Wednesday as investors looked past near-term margin pressures to bet on strong demand for its small cars and a brighter volume outlook.

Foreign investors have pulled more than \$20 billion out of Indian equities in the first four months of 2026, surpassing last year's record annual exit, as an Iran war-driven spike in oil prices soured sentiment on Asia's third-largest economy and one of the biggest importers of crude oil.

Disclaimer:

Ajcon Global Services Limited is a SEBI registered Research Analyst (INH000001170). This report is for informational purposes only and not an offer or solicitation to buy/sell securities. Investments in the securities market are subject to market risks; please read all related documents carefully before investing. The views expressed are based on publicly available information believed to be reliable, but no assurance is given for its accuracy or completeness. Ajcon and its associates may have commercial relationships with companies mentioned. Investors are advised to exercise independent judgment and consult their financial advisor before making investment decisions. For detailed Disclosure and Disclaimer, please click the below link: <http://ajcononline.com/disclosure-and-disclaimer-2/>