



Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,946.25	-109.75	-0.46	2.41	-8.42
BSE Sensex	76,728.37	-372.10	-0.48	3.31	-9.93
Bank Nifty	57,727.35	-449.7	-0.77	7.61	-3.32
Nifty Midcap 100	61,567.30	-228.20	-0.37	1.22	1.34
Nifty Smallcap 100	18,673.10	-117.25	-0.62	3.86	5.47
S&P 500	7,440.43	86.41	1.18	-2.10	8.49
DJIA	52,182.74	306.63	0.59	2.16	7.85
Nasdaq 100	29,774.75	656.51	2.25	-2.42	18.12
Nikkei 225	69,468.11	107.23	0.15	3.79	34.02
Hang Seng	23,026.68	354.82	1.57	-9.34	-12.57
ShanghaiCom	4,073.90	46.64	1.16	0.40	1.25

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,946.25	57,727.35
Support	23,922 & 23,876	57,634 & 57,473
Resistance	24,072 & 24,117	58,154 & 58,314

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	24,754.26	26,104.36	-1,350.10
DII Cash Market	55,273.85	52,472.40	2,801.45

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Max Healthcare	1149.90	2.36	4106.27
Coal India	444.85	2.17	21400.22
Dr Reddys Labs	1375.70	1.87	8857.21
Eternal	259.40	1.67	34568.99
Trent	3258.30	1.31	2676.53
Top Losers			
Kotak Mahindra	395.50	-3.30	37210.25
M&M	3093.00	-2.80	3700.62
Adani Enterprise	2962.50	-2.49	1693.35
Interglobe Avi	5315.20	-2.47	2860.03
Maruti Suzuki	13412.00	-2.42	1358.59

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	73.04	1.46	20.23
WTI (USD/bbl)	70.63	2.02	23.22
Gold Spot (USD/t oz.)	4,016.14	-1.78	-7.30
USD/INR	94.54	-0.14	5.08
10 Year G-Sec India	6.75	-0.25	2.59
US 10 Year Bond	4.37	-0.04	4.93

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian markets fell on Monday, ending their longest weekly gain streak since 2026, as concerns about a weak monsoon offset relief from reduced oil prices and decreasing Middle East tensions. GIFT Nifty futures were at 23,994, as of 7:56 am., indicating the Nifty 50 could open marginally above 23,946.25 points, the closing level of the previous session.

Global

US stocks ended sharply higher on Monday, with the Dow hitting a record closing high, as weekend hostilities between the United States and Iran eased and as major technology-related shares rose following recent selling.

Japan's Nikkei share average reversed course to end higher on Monday, as chip-related stocks cut losses after South Korea rolled out sweeping chip and AI mega-projects.

China and Hong Kong stocks rose on Monday, led by consumer and healthcare shares, as investors rotated out of some artificial intelligence supply-chain names and into more traditional sectors.

Commodities & Currency :

The Indian rupee lumbered in a thin band before ending modestly weaker on Monday as a decline in local stocks eroded the boost to market sentiment from gains in Asian currencies after the US and Iran agreed to halt recent hostilities.

Gold prices fell on Monday as fresh US-Iran tensions lifted oil prices and sparked fears of inflation, bolstering expectations of higher interest rates.

News:

India's industrial output rose 5.1% in May, led by a pickup in electricity growth, government data showed on Monday, while growth in manufacturing moderated due to supply disruptions linked to the Middle East conflict.

India Infrastructure Finance Company (IIFCL) is planning to borrow \$1 billion from overseas investors, which could be its biggest foreign-currency loan, while also exploring a separate \$400 million funding from the Asian Development Bank, an executive said.

India's Capri Global Capital will become the latest entity to debut in the foreign currency debt market, with plans to raise funds through US dollar denominated bonds, two merchant bankers said on Monday.

Shares of India's Persistent Systems fell as much as 11.9% to a near 15-month low on Monday after its 1 billion euro (\$1.14 billion) bid, opens new tab for Germany's Nagarro, as analysts questioned the valuation and flagged integration and margin risks.

India's capital New Delhi will offer a cash incentive of over\$1,000 to car owners willing to scrap their old vehicle for an EV, according to a new policy finalised by the government on Monday in a move aimed at reducing high levels of air pollution.

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