

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	25,454.35	-365.00	-1.41	2.53	-2.65
BSE Sensex	82,498.14	-1236.11	-1.48	2.20	-3.16
Bank Nifty	60,739.55	-811.25	-1.32	3.98	1.72
Nifty Midcap 100	59,227.65	-955.55	-1.59	3.69	-2.51
Nifty Smallcap 100	17,020.35	-218.9	-1.27	3.67	-3.87
S&P 500	6,861.89	-19.42	-0.28	-1.64	0.05
DJIA	49,395.16	-267.5	-0.54	-0.03	2.09
Nasdaq 100	24,797.34	-101.53	-0.41	-3.66	-1.62
Nikkei 225	57,467.83	323.99	0.57	9.14	10.87
Hang Seng	26,705.94	NA	NA	-0.26	1.40
Shanghai Com	4,082.07	NA	NA	1.65	1.46

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,454.35	60,739.55
Support	25,200 & 24,940	60,080 & 59,700
Resistance	25,650 & 25,870	61,259 & 61,680

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	8,614.90	9,495.39	-880.49
DII Cash Market	11,483.86	12,080.14	-596.28

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
ONGC	274.65	3.80	37728.94
Hindalco	905.65	0.71	3522.57
HDFC Life	733.15	0.49	2875.54
Dr Reddys Labs	1282.30	0.16	1333.84
Top Losers			
Interglobe Avi	4815.10	-3.32	1546.01
Trent	4067.90	-2.85	587.30
M&M	3431.80	-2.80	2479.53
UltraTechCement	12688.00	-2.79	195.30
Bharat Elec	435.35	-2.76	9791.52

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	71.66	1.86	18.02
WTI (USD/bbl)	66.44	1.92	15.91
Gold Spot (USD/t oz.)	4,977.33	0.00	14.89
USD/INR	90.68	NA	0.79
10 Year G-Sec India	6.678	0.27	1.46
US 10 Year Bond	4.065	-0.05	-2.44

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

On Thursday, Indian market indices suffered their worst daily losses in more than two weeks as rising US-Iran tensions pushed crude prices higher and weakened morale in the world's third-largest oil importer.

Global

U.S. stocks closed lower on Thursday with the Dow Jones, S&P 500 and Nasdaq all slipping as financials sold off and geopolitical tensions between the U.S. and Iran pushed up oil prices, leaving the S&P 500's year-to-date performance close to flat for 2026.

The Nikkei 225 rose 0.57% to close at 57,468 while the broader Topix climbed 1.18% to 3,852 on Thursday, extending gains from the previous session and taking cues from a strong lead on Wall Street, where technology shares rebounded.

Commodities & Currency:

The Indian currency markets are shut for trading due to a local holiday.

Gold prices rose on Thursday as investors assessed US-Iran tensions, while a drop in US jobless claims signalled labour-market stability ahead of inflation data later this week.

News:

India's biggest conglomerates are stepping up a push into AI and data infrastructure, with Reliance committing about \$110 billion and Adani pledging \$100 billion to position the nation as an emerging hub for AI development.

OpenAI will become the first customer of India's Tata Consultancy Services' data centre business, beginning with 100 megawatts of capacity, part of the global AI infrastructure initiative Stargate, the companies said.

India aims to start producing rare earth permanent magnets by the end of the year in partnership with the private sector, the federal mining minister said on Thursday, as the Asian country seeks to lower imports of critical industrial inputs.

An Indian brokers' body has sought a six-month pause on rules that will tighten bank lending to stockbrokers and other market intermediaries from April 1, according to a document reviewed by Reuters on Thursday.

India's state-run Bharat Petroleum Corp has made its first-ever purchase of Venezuelan oil, and private refiner HPCL Mittal Energy Ltd (HMEL) has bought the South American country's crude for the first time in two years, three sources familiar with the trade.

India's Maharashtra state is using local sources to power farms amid delayed transmission projects, even as it races to boost clean-energy generation, the chairman of the country's top power distributor said. France and India are entering a new era of defence cooperation with plans to jointly produce Rafale fighter jets as well as helicopters, French President Emmanuel Macron said on Thursday, adding France also hopes to sell more submarines to India.

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