

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	24,005.85	140.10	0.59	0.00	-8.19
BSE Sensex	76,922.64	443.97	0.58	0.00	-9.70
Bank Nifty	58,033.05	490.15	0.85	0.00	-2.81
Nifty Midcap 100	62,008.80	211.10	0.34	0.00	2.07
Nifty Smallcap 100	18,931.05	67.95	0.36	0.00	6.93
S&P 500	7,483.23	-16.13	-0.22	0.00	9.32
DJIA	52,305.24	-13.96	-0.03	0.00	8.83
Nasdaq 100	29,809.13	-467.22	-1.54	0.00	16.32
Nikkei 225	70,474.96	412.64	0.59	0.00	35.97
Hang Seng	22,881.02	-145.66	-0.63	0.00	-13.13
ShanghaiCom	4,112.45	18.05	0.44	0.00	2.21

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,005.85	58,033.05
Support	23,800 & 23,500	57,600 & 57,500
Resistance	24,130 & 24,300	58,400 & 58,900

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,623.31	12,763.81	-1,140.50
DII Cash Market	17,136.57	13,977.33	3,159.24

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	279.70	5.71	66845.15
Adani Enterprises	3143.60	3.54	3415.66
Nestle	1453.80	3.46	2672.32
Asian Paints	2716.40	3.06	1097.51
Hindustan Unilever	2182.00	3.01	2497.58
Top Losers			
HCL Tech	1034.20	-3.51	3819.78
Tech Mahindra	1362.20	-3.03	3793.02
TCS	1982.60	-2.41	4658.30
Hindalco	939.70	-1.77	5637.22
Tata Steel	185.17	-1.54	20614.04

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	70.94	-0.88	16.40
WTI (USD/bbl)	67.76	-0.34	18.03
Gold Spot (USD/t oz.)	4,059.25	0.30	-7.25
USD/INR	95.25	-0.61	5.87
10 Year G-Sec India	6.76	0.09	2.65
US 10 Year Bond	4.48	0.16	7.59

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

Indian markets closed higher on Wednesday as strength in financial, auto, and consumer goods shares outweighed weakness in IT stocks, while easing crude oil prices provided an additional boost to market sentiment.

Global

Wall Street closed lower as investors turned cautious ahead of the June jobs report, with weakness in AI and semiconductor stocks weighing on sentiment amid growing focus on the Federal Reserve's next policy move.

Japanese equities advanced for a third straight session on Wednesday, with the Nikkei 225 rising 0.59% to 70,475 and the broader Topix Index adding 0.42% to 4,012, buoyed by an overnight technology-driven rally on Wall Street.

China's Shanghai Composite rose 0.44% to close at 4,112 on Wednesday, while the Shenzhen Component fell 0.53% to 16,119, as concerns over uneven economic growth continued to weigh on investor sentiment.

Commodities & Currency:

The Indian rupee weakened to a near three-week low on Wednesday, tracking losses across Asian currencies as investors turned cautious ahead of remarks by the U.S. Federal Reserve Chair and amid lingering uncertainty over U.S.-Iran negotiations. The currency fell 0.6% to close at 95.2475 against the U.S. dollar, marking its steepest single-day decline since June 8.

Gold rebounded as softer US labor data and easing inflation expectations boosted demand for the safe-haven metal, with investors now awaiting the June jobs report for clearer signals on the Federal Reserve's policy path.

News:

The Union Cabinet approved two road infrastructure projects worth ₹14,115 crore, including a 6-lane tunnel in Delhi and a 4-lane access-controlled highway in Uttar Pradesh.

India's manufacturing activity slowed in June, with the HSBC India Manufacturing PMI falling to 54.2 from 55.0 in May (below the 54.5 flash estimate), marking the second-weakest reading since mid-2022.

The Finance Ministry's Expenditure Finance Committee approved a ₹1.25 lakh crore outlay for India Semiconductor Mission (ISM) 2.0, up from ₹76,000 crore under ISM 1.0, with the proposal now awaiting Union Cabinet approval.

KPIT Technologies shares fell 17% after the company projected a Q1 FY27 revenue decline and margin pressure due to unexpected actions by European automakers, but expects a recovery in H2 FY27 driven by long-term outsourcing and automation trends.

India has begun testing E25 petrol (containing 25% ethanol) over 150,000 km to assess its impact on vehicle performance and fuel efficiency, with the study report expected by the end of next year.

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