

Indices	Closing Level	Change		Performance	
		Value	(%)	MTD (%)	YTD (%)
Global					
Nifty 50	23,865.75	-80.50	-0.34	2.07	-8.72
BSE Sensex	76,478.67	-249.70	-0.33	2.98	-10.22
Bank Nifty	57,542.90	-184.45	-0.32	7.27	-3.63
Nifty Midcap 100	61,797.70	230.40	0.37	1.59	1.72
Nifty Smallcap 100	18,863.10	190.00	1.02	4.91	6.54
S&P 500	7,499.36	58.93	0.79	-1.45	9.55
DJIA	52,319.20	136.46	0.26	1.97	8.85
Nasdaq 100	30,276.35	501.60	1.68	-0.78	20.11
Nikkei 225	70,062.32	594.21	0.86	4.67	35.17
Hang Seng	22,881.02	-145.66	-0.63	-9.91	-13.13
Shanghai Com	4,094.40	20.50	0.50	0.90	1.76

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	23,865.75	57,542.90
Support	23,800 & 23,750	57,473 & 57,100
Resistance	24,072 & 24,117	58,154 & 58,314

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	23,273.71	25,830.46	-2,556.75
DII Cash Market	23,432.58	16,590.24	6,842.34

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Maruti Suzuki	14115.00	5.24	1511.42
Titan Company	4404.00	2.96	1243.46
Adani Enterprise	3036.00	2.48	2099.29
Bajaj Finance	1004.75	2.31	12445.42
TMPV	352.20	2.07	17609.24
Top Losers			
Eicher Motors	7073.50	-4.75	2474.67
Infosys	1000.40	-3.50	24128.26
TATA Cons. Prod	1075.60	-3.34	5430.87
TCS	2031.50	-3.17	6848.41
Wipro	170.39	-2.90	26845.38

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	73.40	0.34	20.82
WTI (USD/bbl)	71.36	0.86	24.49
Gold Spot (USD/t oz.)	4,026.40	0.26	-7.06
USD/INR	94.67	-0.14	5.23
10 Year G-Sec India	6.75	-0.03	2.56
US 10 Year Bond	4.37	-0.04	4.93

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmarks fell on Tuesday, pulled down by IT stocks on concerns that US interest rates will stay higher for longer, but still posted monthly gains due to reduced oil costs and attempts to encourage foreign investment, stabilizing the rupee.

Global

U.S. stocks closed higher on Tuesday, capping a strong quarter as AI and chipmakers powered gains while investors shifted focus to Fed Chair Kevin Warsh's remarks at the ECB Forum in Sintra for fresh signals on the monetary policy outlook.

Japan's Nikkei share average climbed on Tuesday, powered by a rebound in technology stocks that have helped drive the gauge's record quarterly gains.

China's stock markets ended higher on Tuesday after better-than-expected PMI data strengthened confidence in the country's economic recovery. The Shanghai Composite rose 0.5% to close at 4,094, while the Shenzhen Component gained 2.48% to 16,206.

Commodities & Currency:

The Indian rupee logged its first quarter-on-quarter gain since March 2025, even though it slipped on Tuesday, thanks to a sharp retreat in oil prices and a salvo of policy measures to draw dollar inflows.

Gold edged up on Tuesday but was on track for its sharpest quarterly decline in 13 years, as inflation concerns stemming from the Middle East conflict reinforced expectations that the U.S. Federal Reserve could hike interest rates.

News:

India recorded its driest June in more than a decade and the fifth driest since record-keeping began in 1901, with monsoon rainfall 39.8% below the long-term average, weather department data showed.

Japanese Prime Minister SanaeTakaichi will visit India from Wednesday for talks with Prime Minister Narendra Modi focused on boosting trade, investment and strategic cooperation between the two Asian partners, the foreign ministry in Tokyo said.

Indian banks' combined gross bad loan ratio is projected to stay under 2% for three years under a so-called baseline scenario as lenders have stayed resilient in a challenging global setup, the central bank's Financial Stability Report said.

India's Adani Ports and Special Economic Zone said that Switzerland's MSC Group will acquire a 49% stake in its Vizhinjam port for \$1.4 billion, in what it said is the largest foreign private investment in domestic port infrastructure.

India's fiscal deficit in April-May was at 1.62 trillion rupees (\$17.11 billion), or 9.6% of the estimate for the financial year ending March 31, government data showed.

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