

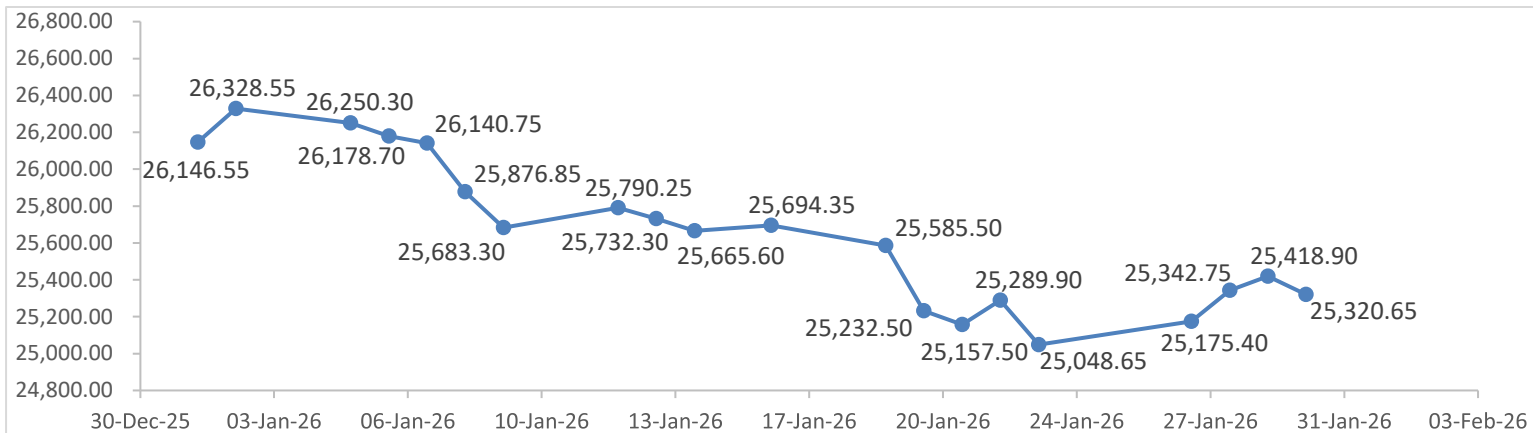
Nifty 50

25,320.65 **-808.95**
(-3.10%)

52 Week High: 26,373.2

52 Week Low: 21,743.6

Resistance		Support	
R1	26,000	S1	25,880
R2	26,200	S2	25,800
R3	26,300	S3	25,500



Sectorial Indices	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
Nifty Auto	28,189	26,750	-5.10%
Nifty PSU Bank	8,533	9,019	5.70%
Nifty Pharma	22,723	21,715	-4.44%
Nifty IT	37,884	38,036	0.40%
Nifty FMCG	55,475	51,215	-7.68%
Nifty Metal	11,167	11,827	5.91%
Nifty Fin Serv	27,613.3	27,335	-1.01%
Nifty Cons	36,756	34,387	-6.45%

Global Indices	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
Dow Jones	48,063	48,892	1.72%
Nasdaq	23,241	25,552	9.94%
FTSE	9,922	10,223	3.03%
Hang Seng	25,630	27,387	6.86%
USD/INR	89.83	91.64	2.01%
GBP/INR	121.03	125.42	3.63%

Net Flow	Amount (Rs Cr)
FII	-41,435
DII	69,220
MF Equity	39,062
MF Debt	-74,827

Index	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
SENSEX	85,220	82,269	-3.46%
NIFTY 50	26,129	25,320	-3.10%
BANK NIFTY	59,581	59,610	0.05%

Top Gainers	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
HINDCOPPER	518.3	685.9	32.34
NATIONALUM	314.3	385.45	22.64
OIL	424.35	510.5	20.20
UNIONBANK	153.76	180.76	17.56
MRPL	152.03	176.54	16.12

Top Losers	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
ONESOURCE	1810.6	1194.5	-34.03
NEWGEN	845.1	582	-31.13
COHANCE	528.6	381.3	-27.87
SYNGENE	651	473.45	-27.27
KALYANKJIL	485.35	361.65	-25.49

Commodities	Prev. Close (31-Dec'25)	Close (30-Jan'26)	% Change (1M)
Gold	1,35,447	1,49,653	10.49%
Silver	2,35,701	2,91,925	23.85%
Crude (WTI)	57.52	65.21	13.37%

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Trump 500% tariff threat on India triggers Dalal Street sell-off; trade war fears escalate:

Indian markets tumbled after reports of a Donald Trump-backed bill proposing up to 500% tariffs on Indian goods, escalating trade war fears. The BSE Sensex fell 780 points, while the Nifty 50 slipped below 26,000—its worst day since Dec 8, 2025. Over four sessions, Sensex lost 1,600 points and Nifty 480, with metals, IT, pharma, and PSU banks hit. Reliance Industries dropped 8% from ₹1,611, eroding ₹2 trillion in market cap. Earlier US tariffs totaled 50%. Market participants are now closely watching geopolitical developments, as the situation has the potential to disrupt trade flows, corporate earnings, and broader economic stability.

US Federal Reserve pauses rate cuts in January; global liquidity outlook turns cautious:

After delivering three rate cuts in 2025, market expectations have shifted toward just 1–2 cuts in 2026, signalling a more cautious global liquidity outlook and reduced capital flows to emerging markets like India. The US 10-year Treasury yield stayed elevated above 4.4%, making dollar-denominated assets more attractive relative to Indian equities. This shift has weighed on capital flows to markets like India, with sustained FII outflows reflecting a risk-off stance. At the same time, higher US yields and a strong dollar have kept pressure on the Indian rupee, adding to macro headwinds for domestic equities.

Economic Survey: A Blueprint for 7.2% Growth:

The Economic Survey 2025-26, tabled on January 29, projected a resilient GDP growth of 6.8–7.2% for the upcoming fiscal. It highlighted India’s robust domestic demand as a primary buffer against global "unusually challenging" trade headwinds. While the Survey noted that inflation is successfully moderating toward the 4% target, it emphasized the need for continued private capital expenditure. Investors cheered the government’s commitment to fiscal consolidation, though the report warned that volatile global commodity prices remain a key risk to the fiscal deficit targets and the strengthening Rupee.

Pre-Budget Closing: Jitters Spark Month-End Volatility:

The Indian markets closed January 2026 on a cautious note as "Pre-Budget jitters" triggered significant profit-booking. The Sensex, which hit record highs earlier in the month, retreated toward the 81,500 level as FIIs offloaded holdings amid rumors of a potential hike in the Securities Transaction Tax (STT). Volatility surged, with the Nifty VIX jumping 14% in the final week. Traders adopted a "wait-and-watch" stance, de-risking portfolios ahead of the February 1st announcement, reflecting deep anxiety over capital gains tax structures and potential changes to the F&O segment.

Bitcoin’s "Leverage Flush": \$430M Liquidated in One-Hour Freefall:

Bitcoin decisively breached the critical \$85,000 support level, triggering a brutal "liquidity grab." In just one hour, approximately \$430 million in leveraged long positions were flushed from the market. This rapid cascade was fueled by hawkish Federal Reserve signals and geopolitical tensions, forcing automated systems into a wave of forced selling. The plunge saw Bitcoin drop from a mid-month high near \$98,000 to an intraday low of \$80,000. This massive deleveraging event erased over \$60 billion in market cap, shifting the New Year's euphoria toward macro-driven caution.

IPO Update :-

Company Name	IPO Date (January'26)	Market Response
Bharat Coking Coal (BCCL)	09 Jan – 13 Jan	143.85x oversubscribed

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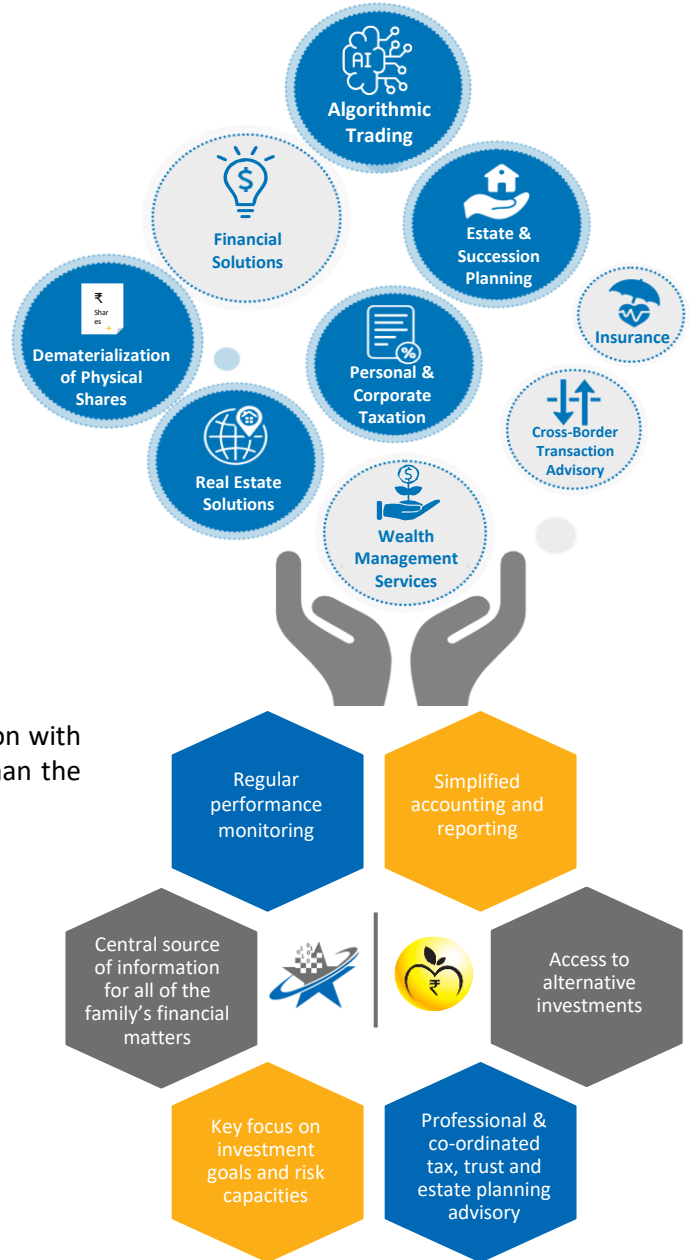
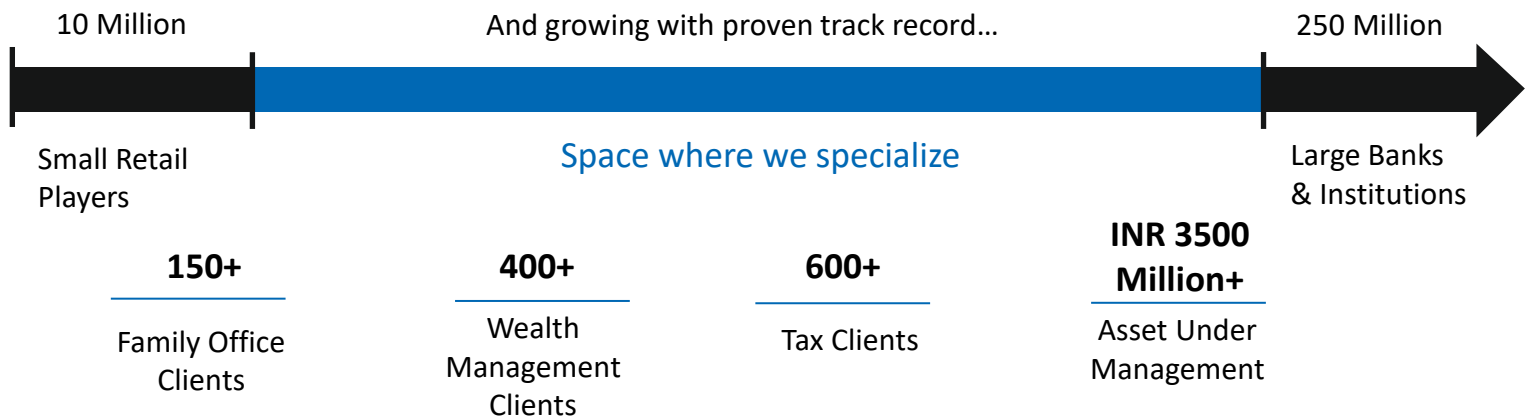
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