Daily Market Insight

~ Where the market left its footprints   1st September 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,426.85	-74.05	-0.30	-0.56	2.88
BSE Sensex	79,809.65	-270.92	-0.34	-0.98	1.66
Bank Nifty	53,655.65	-164.7	-0.31	-3.53	5.08
Nifty Midcap 100	55,727.40	-320.10	-0.57	-1.61	-3.00
Nifty Smallcap 100	17,227.00	-67.35	-0.39	-2.50	-9.14
S&P 500	6,460.26	-41.6	-0.64	3.56	10.08
DJIA	45,544.88	-92.02	-0.20	4.49	7.44
Nasdaq 100	23,415.42	-288.03	-1.22	2.86	11.63
Nikkei 225	42,718.47	-110.32	-0.26	4.70	8.68
Hang Seng	25,077.62	78.8	0.32	2.33	27.79
Shanghai Com	3,857.93	14.33	0.37	8.37	18.25

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,426.85	53,655.65
Support	24,340 & 24,220	53,400 & 53,150
Resistance	24,480 & 24,590	54,100 & 54,400

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,679.99	17,992.65	-8,312.66
DII Cash Market	20,676.78	9,189.14	11,487.64

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
ITC	409.75	2.21	25255.05
Bharat Elec.	369.40	1.53	12739.66
Shriram Finance	580.25	1.50	12236.79
Asian Paints	5298.00	1.19	1333.72
Trent	2518.60	1.19	1798.65
Top Losers			
M&M	3199.50	-2.91	3017.63
Reliance	1357.20	-2.07	18758.84
Infosys	1469.60	-2.03	8169.08
Apollo Hospital	7610.00	-1.53	481.59
Adani Ent.	2244.70	-1.34	795.70

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	68.12	-0.74	-10.29
WTI (USD/bbl)	64.01	-0.91	-12.47
Gold Spot (USD/t oz.)	3,447.95	0.90	29.72
USD/INR	88.21	-0.65	2.99
10 Year G-Sec India	6.568	0.54	-3.15
US 10 Year Bond	4.228	0.60	-7.45

Source: Bloomberg

MARKET COMMENTARY

Equity:

India

On August 29, 2025, Indian equity markets closed lower, with the Sensex declining 270.92 points to 79,809.65 and the Nifty shedding 74.05 points to 24,426.85, as sectors like IT, metals, and automobiles underperformed, while consumer durables and FMCG stocks showed resilience. GIFT Nifty rose 60 points to 24,613 in the morning, indicating a positive start for Dalal Street on Monday.

Global

U.S. stock markets closed lower as investors reacted to inflation data and geopolitical concerns, with the Nasdaq leading declines, Nvidia extending its losing streak, and Alibaba's AI chip development news impacting the tech sector.

On Friday, Japan's Nikkei 225 fell 0.26% and the Topix dropped 0.47% as weaker-than-expected industrial and retail data weighed on sentiment, while unemployment eased and August gains remained strong, led by robust corporate earnings, despite losses in Lasertec, Toyota, and Kawasaki Heavy.

China's Shanghai Composite rose 0.37% and the Shenzhen Component gained 0.99%, extending August gains of 8% and 15% respectively, driven by easing US-China trade tensions, strong liquidity, and AI and semiconductor stocks.

Commodities & Currency:

The Indian rupee fell to a record low of 88.25 against the US dollar on Friday, weighed down by persistent concerns over steep US tariffs on Indian exports.

Gold rose to $3,448 per ounce on Friday, nearing April's record, and is set for a second weekly gain, up about 4% in August, as investors sought safe haven amid Fed rate-cut expectations and resilient US consumer spending.

News:

India's economy posted a surprising rebound in Q1 FY 26 (April–June 2025), with real GDP growing an impressive 7.8%, marking the fastest pace in five quarters and well above expectations—highlighting the economy's resilience amid global headwinds like U.S. tariffs.

On August 29, 2025, Japanese PM Shigeru Ishiba and Indian PM Narendra Modi agreed in Tokyo to strengthen economic and security ties, covering defense, AI, space, high-speed rail, and supply chains, with Japan planning to invest ¥10 trillion (~$68 billion) as both leaders supported a free Indo-Pacific amid rising U.S. tariffs.

Mukesh Ambani announced that Reliance Jio Platforms will go public in the first half of 2026, with the listing plans currently underway pending regulatory approvals.

Reliance unveiled Reliance Intelligence, a new AI subsidiary to build large-scale, green-powered data centers in India, while also announcing partnerships with Google for a cloud region in Jamnagar and a $100 million joint venture with Meta to deploy its Llama-based AI services.