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Daily Market Insight

~ Where the market left its footprints 07th October 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,077.65	**183.4**	**0.74**	**0.97**	**5.62**
BSE Sensex	81,790.12	**582.95**	**0.72**	**1.00**	**4.18**
Bank Nifty	56,104.85	**515.6**	**0.93**	**1.37**	**9.88**
Nifty Midcap 100	58,015.10	**511.75**	**0.89**	**1.73**	**0.98**
Nifty Smallcap 100	17,928.05	**49.9**	**0.28**	**0.97**	**-5.44**
S&P 500	6,740.28	**24.49**	**0.36**	**0.07**	**14.44**
DJIA	46,694.97	**-63.31**	**-0.14**	**0.68**	**10.30**
Nasdaq 100	24,978.56	**193.04**	**0.78**	**-0.06**	**18.16**
Nikkei 225	47,944.76	**2175.26**	**4.75**	**7.62**	**21.97**
Hang Seng	26,957.77	**-183.15**	**-0.67**	**-1.21**	**37.38**
Shanghai Com	3,882.78	**NA**	**NA**	**NA**	**19.01**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,077.65	56,104.85
Support	24,870 & 24,690	55,750 & 55.500
Resistance	25,150 & 25,260	56,410 & 56,690

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,950.18	11,263.95	**-313.77**
DII Cash Market	16,124.47	11,088.08	**5,036.39**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Max Healthcare	1139.70	**6.59**	8494.61
Shriram Finance	671.45	**3.97**	10343.49
TCS	2988.40	**2.98**	2112.77
Apollo Hospital	7662.00	**2.85**	423.56
Tech Mahindra	1439.30	**2.76**	3036.77
Top Losers			
TATA Steel	170.06	**-1.82**	21474.00
Adani Ports	1400.50	**-1.31**	1338.65
PowerGrid Corp	286.90	**-0.97**	11702.72
Eicher Motors	6880.00	**-0.88**	218.20
ITC	400.75	**-0.88**	13989.08

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.50	**1.41**	**-13.82**
WTI (USD/bbl)	61.67	**1.30**	**-15.62**
Gold Spot (USD/t oz.)	3,960.46	**1.90**	**49.01**
USD/INR	88.79	**-0.01**	**3.67**
10 Year G-Sec India	6.519	**0.12**	**-3.87**
US 10 Year Bond	4.162	**0.34**	**-9.84**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares climbed on Monday, 6th October, driven by gains in banking and financial stocks following robust quarterly updates, while IT stocks rose ahead of the September earnings season. The futures contract based on the benchmark Nifty 50 fell 0.09% at 25,156 as of 6:46 a.m. indicating a tepid start for the Indian markets.

Global

The S&P 500 and the Nasdaq advanced on Monday, as artificial intelligence-related deal making boosted investor sentiment even as the US government shutdown extended through its sixth day. The Nasdaq and the S&P 500 reached record closing highs, while the blue-chip Dow inched lower.

Japanese stocks surged to record highs, with the Nikkei 225 jumping 4.75% and Topix 3.1%, as pro-stimulus lawmaker Sanae Takaichi's LDP leadership win boosted hopes for continued expansionary policies, led by strong gains in tech shares.

Hong Kong stocks fell as the US government shutdown hit investor sentiment and spurred demand for safe-haven assets like gold.

Commodities & Currency :

The Indian rupee traded in a narrow range, closing nearly flat at 88.79 per dollar, as likely RBI intervention offset dollar demand from importers and kept the currency just above its record low.

Gold prices surged to record highs above $3,900 per ounce on expectations of further US rate cuts, and as investors fleeing economic and political uncertainty piled into the safe-haven precious metal.

News:

India's power regulator has accepted petitions from solar firms seeking compensation for losses caused by delays in transmission infrastructure, potentially setting a precedent for renewable developers affected by grid bottlenecks.

A government source said there is sufficient Russian oil available in global markets for Indian refiners, with imports increasing as attacks on Russian facilities open up supply.

India's services sector growth cooled in September, with the HSBC PMI sliding to 60.9 from August's 15-year high of 62.9, as export demand softened though domestic activity stayed resilient.

Indian auto and electronics dealers are limiting festive season inventory to protect working capital, awaiting potential GST rate cuts, while consumers delay purchases anticipating price drops.

Ola Electric became the first two-wheeler EV maker to get government certification for its indigenously developed rare-earth-free ferrite motor, a cost-effective alternative to imported magnets that will now power its entire product range.

Bank lending in India rose by 10.3% year-on-year as of early September, but overall demand for credit remained subdued despite healthy capital buffers.