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Daily Market Insight

~ Where the market left its footprints 10th October 2025, 8:20am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,181.80	135.65	0.54	1.39	6.06
BSE Sensex	82,172.10	398.44	0.49	1.47	4.67
Bank Nifty	56,192.05	173.8	0.31	1.53	10.05
Nifty Midcap 100	58,429.85	563.10	0.97	2.46	1.70
Nifty Smallcap 100	18,000.25	109.65	0.61	1.38	-5.06
S&P 500	6,735.11	-18.61	-0.28	0.36	14.77
DJIA	46,358.42	-243.36	-0.52	-0.18	9.36
Nasdaq 100	25,098.18	-38.44	-0.15	1.20	19.65
Nikkei 225	48,580.44	845.45	1.77	9.04	23.59
Hang Seng	26,752.59	-76.87	-0.29	-1.96	36.33
Shanghai Com	3,882.78	NA	NA	NA	19.01

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,181.80	56,192.05
Support	25,000 & 24,880	55,820 & 55.510
Resistance	25,330 & 25,450	56,530 & 56,690

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,907.48	9,599.32	1,308.16
DII Cash Market	12,577.04	11,712.68	864.36

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
JSW Steel	1175.20	2.62	2001.61
Tata Steel	176.42	2.61	68504.72
HCL Tech	1486.50	2.29	2681.32
SBI Life Insurance	1809.80	2.08	848.47
UltraTechCement	12192.00	1.68	171.74
Top Losers			
Axis Bank	1167.40	-1.12	7194.65
Titan Company	3550.60	-0.42	597.74
TATA Cons. Prod	1118.00	-0.20	852.90
Maruti Suzuki	15985.00	-0.17	300.50
HDFC Bank	977.10	-0.16	15370.95

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.00	-1.89	-14.39
WTI (USD/bbl)	61.31	-1.98	-16.16
Gold Spot (USD/t oz.)	3,974.50	-1.67	49.54
USD/INR	88.79	0.01	3.67
10 Year G-Sec India	6.524	0.32	-3.80
US 10 Year Bond	4.136	-0.05	-9.47

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities climbed on Thursday, 09th October, with stronger basic metals prices helping metal stocks and IT companies ticking higher ahead of TCS' quarterly results, the country's largest software-services exporter.

Global

US stocks ended in negative territory as investors, left with no economic data or any sentiment-swaying catalysts, took the opportunity to consolidate ahead of third-quarter earnings season.

Japan's Nikkei share average rallied to a fresh high, with index heavyweight SoftBank Group surging more than 11% as investors bought into its vision of artificial intelligence-powered robots.

Hong Kong stocks fluctuated, as weak holiday spending in mainland China fanned concerns over consumption, while investors awaited policy signals from the Communist Party's key meeting this month that will chart the nation's next five-year plan.

Commodities & Currency :

The Indian rupee remained around its all-time low, as the Reserve Bank of India's expected intervention served to alleviate persistent pressure on the South Asian currency.

Gold prices fell, dipping below the $4,000/oz milestone breached for the first time in the previous session, as the dollar pushed higher and gold investors booked profits following a ceasefire deal between Israel and Hamas.

News:

Investors scrambled to acquire a piece of the appliance manufacturer in a flaming IPO market, and LG Electronics' Indian unit's $1.3 billion first share sale completed Thursday, becoming the most subscribed billion-dollar IPO in over 20 years.

Tata Consultancy Services, India's largest software services exporter, surpassed quarterly revenue expectations, buoyed by growth in its banking, financial services, and insurance verticals, amid tariff-related uncertainty and rising concerns from a tightening US visa policy.

Britain announced it had inked a 350 million pound ($468 million) contract to supply the Indian army with UK-manufactured lightweight missiles as part of a growing weapons and defense collaboration between the two nations.

Chevron India opened a 312,000-square-foot facility for its Engineering and Innovation Excellence Center (ENGINE) in Bengaluru, a year after launching the unit to consolidate technical work and deepen its digital and artificial intelligence capabilities.

India's consumer inflation rate likely eased back below the lower end of the RBI's 2-6% target range to 1.70% last month on persistent cooling in food prices, according to economists polled by Reuters.

Indian engineering research and development (ER&D) firm Tata Elxsi reported a fourth straight quarter of widening profit fall, as its key transportation business declined amid uncertain markets and geopolitical tensions.