AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 11th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,363.30	-232.85	-0.95	-0.82	2.61
BSE Sensex	79,857.79	-765.47	-0.95	-0.92	1.72
Bank Nifty	55,004.90	-516.25	-0.93	-1.10	7.72
Nifty Midcap 100	56,002.20	-936.10	-1.64	-1.12	-2.52
Nifty Smallcap 100	17,428.20	-264.45	-1.49	-1.36	-8.08
S&P 500	6,389.45	49.45	0.78	2.43	8.88
DJIA	44,175.61	206.97	0.47	1.35	4.21
Nasdaq 100	23,611.27	221.74	0.95	3.73	12.57
Nikkei 225	41,820.48	761.33	1.85	2.50	6.39
Hang Seng	24,858.82	-222.81	-0.89	1.43	26.68
Shanghai Com	3,635.13	-4.54	-0.12	2.11	11.42

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,363.30	55,004.90
Support	24,200 & 24,050	54,840 & 54,560
Resistance	24,500 & 24,650	55,380 & 55,650

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,682.11	15,749.30	1,932.81
DII Cash Market	16,682.09	8,958.43	7,723.66

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
NTPC	334.75	1.52	11247.22
Titan Company	3460.20	1.30	2184.27
Dr. Reddys Labs	1211.40	0.88	2389.11
HDFC Life	761.55	0.77	2210.68
Bajaj Finserv	1919.20	0.27	507.89
Top Losers			
Bharti Airtel	1858.60	-3.33	93801.11
Adani Enterprise	2178.10	-3.19	2552.74
IndusInd Bank	782.45	-3.08	2490.57
Shriram Finance	609.65	-2.82	5493.42
M&M	3144.20	-2.08	1721.04

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.59	0.24	-12.30
WTI (USD/bbl)	63.88	0.00	-12.65
Gold Spot (USD/t oz.)	3,397.75	0.04	27.84
USD/INR	87.66	0.05	2.35
10 Year G-Sec India	6.412	0.41	-5.44
US 10 Year Bond	4.283	0.77	-6.26

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity benchmarks fell on Friday, posting their sixth straight weekly loss as US tariffs, trade uncertainty and muted earnings dampened sentiment.

Global

US stocks ended higher and the Nasdaq notched a record closing high for the second straight day on Friday as technology-related shares, including Apple, gained and as investors was optimistic about potential interest rate cuts.

Japanese shares surged after positive earnings reports and expectations the US would remove overlapping tariffs on the country's goods.

Hong Kong stocks took a pause after a four-day gain, as disappointing earnings results put investors on edge and concerns lingered that China's deflation would drag on.

Commodities & Currency :

The Indian rupee's initial rise on Friday was capped by dollar demand from importers and short-term speculators, who were wary of the overhang from US trade tensions.

Gold rose to an over two-week high, buoyed by safe haven demand after US President Donald Trump's tariffs went into effect and US jobs data added to rate-cut expectations.

News:

Indian automaker Tata Motors posted a 63% slump in quarterly profit on Friday, its fourth straight quarter of decline, as US tariffs hurt businesses that were already reeling from weak sales.

Reliance Industries is likely to shift back to its traditional Middle Eastern sources for oil if India yields to pressure from US President Donald Trump to cut Russian imports, trade sources said.

Ever since Donald Trump's tariff salvo on India this week, garment maker Pearl Global - whose US client list includes Gap and Kohl's - has been receiving midnight panic calls with an ultimatum: share the tariff hit or move production out of India.

US President Donald Trump imposed an additional 25% tariff on goods imported from India this week, citing India continued purchase of Russian oil. The new import tax, effective 21 days after August 7, will raise duties on some Indian goods to as high as 50% - among the highest levied on any US trading partner.

State Bank of India is confident that corporate loan growth will quicken to double-digit percent despite US tariff-related turmoil, its chairman said on Friday; after treasury profits helped the country's top bank beat earnings estimates.

Cooling food price rises likely reduced India retail inflation to an eight-year low of 1.76% in July, below the low end of the Reserve Bank of India's 2% to 6% tolerance band for the first time in over six years, a Reuters poll of economists showed.