AJCONGLOBAL
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Daily Market Insight

~ Where the market left its footprints 12th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,585.05	221.75	0.91	0.08	3.55
BSE Sensex	80,604.08	746.29	0.93	0.01	2.67
Bank Nifty	55,510.75	505.85	0.92	-0.19	8.72
Nifty Midcap 100	56,479.00	476.80	0.85	-0.28	-1.69
Nifty Smallcap 100	17,491.70	63.5	0.36	-1.00	-7.74
S&P 500	6,373.45	-16.00	-0.25	2.17	8.60
DJIA	43,975.09	-200.52	-0.45	0.89	3.73
Nasdaq 100	23,526.63	-84.64	-0.36	3.35	12.16
Nikkei 225	41,820.48	761.33	1.85	2.50	6.39
Hang Seng	24,906.81	47.99	0.19	1.63	26.92
Shanghai Com	3,647.55	12.42	0.34	2.46	11.80

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,585.05	55,510.75
Support	24,450 & 24,230	55,200 & 54,840
Resistance	24,670 & 24,780	55,555 & 56,111

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	9,477.30	10,679.95	-1,202.65
DII Cash Market	15,109.07	9,136.71	5,972.36

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Enterprise	2283.40	4.83	2376.29
Tata Motors	653.75	3.16	17275.39
Eternal	309.40	2.82	44948.32
Grasim	2758.90	2.50	1236.33
Apollo Hospital	7259.00	2.46	498.60
Top Losers			
Hero Motocorp	4562.20	-0.82	455.56
Bharat Elec	383.90	-0.18	8910.94
Bharti Airtel	1857.40	-0.06	5266.53

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.72	0.20	-12.13
WTI (USD/bbl)	64.06	0.28	-12.40
Gold Spot (USD/t oz.)	3,353.45	-1.30	26.17
USD/INR	87.66	0.01	2.34
10 Year G-Sec India	6.440	0.44	-5.04
US 10 Year Bond	4.281	-0.09	-6.30

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices began the week on a positive note, driven by post-earnings gains in State Bank of India and Tata Motors, as investors piled into stocks after six weeks of losses as they awaited US-Russia talks. The GIFT Nifty was trading 0.12% or 28.50 points higher at 24,580.50, which indicated 5 points lower open for the benchmark NSE Nifty 50 index.

Global

Wall Street's main indices ended lower on Monday as investors anxiously await inflation data this week to assess the outlook for interest rates and eye US-China trade developments.

Japan's stock market was closed for a holiday.

China and Hong Kong stocks rose on Monday, with investors focused on whether the US-China trade truce deadline would be extended, while shrugging off data that highlighted persistent deflationary pressures in the world's second-largest economy.

Commodities & Currency :

The Indian rupee closed unchanged on Monday, as dollar demand from importers offset early gains driven by a softer greenback and recovery in the non-deliverable forward (NDF) market.

Gold prices fell on Monday after President Donald Trump said tariffs will not be placed on imported gold bars, while investors awaited a US inflation report that could provide an indication of the Federal Reserve's rate outlook.

News:

India hopes trade talks with the US will continue even as the US hiked tariffs on its exports to 50% due to India purchase of sanctioned Russian oil, two lawmakers said on Monday, citing a briefing to a parliamentary panel on foreign affairs.

India is planning to provide credit guarantees for loans overdue up to 90 days to small businesses and exporters, amid higher tariffs imposed by the US, two government sources told Reuters.

The Indian alloy steel producers' association has filed an anti-dumping petition with the federal trade ministry against cheap imports from China.

India's state-owned BEML reported a narrower first-quarter loss on Monday, helped by better order execution and a surge in non-operating income.

India's record run in corporate bond issuance is expected to continue through August, as higher-rated companies and banks rush to tap the market for cheaper fundraising, underscoring a broader shift in corporate financing strategies amid declining bond yields and ample liquidity, investors said.

Footwear retailer Bata India reported a drop in first-quarter adjusted profit on Monday, hurt by higher costs and as sluggish consumption trends dragged on sales growth.