AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 13th October 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,285.35	103.55	0.41	1.81	6.50
BSE Sensex	82,500.82	328.72	0.40	1.87	5.09
Bank Nifty	56,609.75	417.7	0.74	2.28	10.87
Nifty Midcap 100	58,697.40	267.55	0.46	2.92	2.17
Nifty Smallcap 100	18,133.35	133.1	0.74	2.13	-4.36
S&P 500	6,552.51	-182.6	-2.71	-2.36	11.65
DJIA	45,479.60	-878.82	-1.90	-2.07	7.28
Nasdaq 100	24,221.75	-876.43	-3.49	-2.34	15.48
Nikkei 225	48,088.80	-491.64	-1.01	7.94	22.34
Hang Seng	26,290.32	-462.27	-1.73	-3.65	33.97
Shanghai Com	3,897.03	-36.94	-0.94	-0.94	19.45

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,285.35	56,609.75
Support	25,150 & 25,000	56,130 & 55.920
Resistance	25,450 & 25,550	56,850 & 57,135

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,236.07	9,776.87	459.20
DII Cash Market	12,760.06	11,052.23	1,707.83

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1561.80	3.22	1495.52
SBI	880.65	2.15	13713.02
Maruti Suzuki	16265.00	1.75	423.03
Bajaj Auto	8946.50	1.55	228.69
Dr Reddys Labs	1264.40	1.47	1680.92
Top Losers			
Tata Steel	173.86	-1.45	18085.98
TCS	3028.30	-1.09	8817.37
HDFC Life	747.30	-0.93	2771.30
Tech Mahindra	1457.20	-0.64	937.05
JSW Steel	1167.80	-0.63	1457.77

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.73	-3.82	-17.38
WTI (USD/bbl)	58.90	-4.24	-19.46
Gold Spot (USD/t oz.)	4,017.79	1.03	51.16
USD/INR	88.70	0.11	3.56
10 Year G-Sec India	6.537	0.20	-3.60
US 10 Year Bond	4.032	-2.57	-11.75

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Benchmark indices closed significantly higher on Friday, 10th October, extending gains for the second straight session, led by IT and bank sectors as upbeat optimism ahead of the earnings season attracted in international investors. The Nifty closed above the 25,280 mark, with realty, PSU bank, and pharma stocks leading the gains.

Global

Wall Street fell as US President Donald Trump scared markets with a series of bellicose warnings against China after Beijing tightened its rare earth limits.

The Japan stock market witnessed a notable decline due to political uncertainty and currency fluctuations. The Nikkei 225 fell 1.01% to close at 48,089, and the broader Topix dropped 1.85% to 3,198.

Hong Kong stocks fell, tracking a pause in Wall Street's rally, driven by growing investor concerns that the artificial intelligence boom has pushed valuations to excessive levels.

Commodities & Currency :

The Indian rupee nudged higher, easing away from its all-time low after spending much of the week pinned near it, as persistent central bank defence of the currency spurred interbank dollar sales.

Gold pared some gains after briefly rallying above the $4,000 an ounce milestone for a second time this week as US. President Donald Trump's warning of possible fresh tariffs on China accelerated a flight to safe-haven assets.

News:

US Ambassador to India Sergio Gor said he met with Indian Prime Minister Narendra Modi and discussed bilateral issues which included trade, defense and technology.

Inflows into India's equity mutual funds eased 9% month-on-month to 304.22 billion rupees ($3.44 billion) in September as a sharp slowdown in sectoral and thematic funds weighed on overall flows, data from the Association of Mutual Funds in India (AMFI) showed on Friday.

Dutch technology investor Prosus will buy a 10.1% stake in India's Ixigo for 12.96 billion rupees ($146 million), the online travel booking platform said.

Kotak Mahindra Asset Management Company's suspension of lump-sum subscriptions in its silver exchange-traded fund-of-funds is "purely temporary" and likely to be lifted within the next couple of weeks as supply improves after the Hindu festival of Diwali, said Satish Dondapati, fund manager at the firm.

SBI is set to return to the rupee debt market after a year with plans to raise funds through Basel III-compliant tier II bonds this month, three sources familiar with the matter said.

WeWork India Management shares settled 3% lower in their trading debut on Friday, valuing the co-working space provider at 84.25 billion rupees (about $950 million), as investors worried about steep valuation and governance risks.