Daily Market Insight

~ Where the market left its footprints 14th July 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,149.85	-205.4	-0.81	-1.53	5.93
BSE Sensex	82,500.47	-689.81	-0.83	-1.43	5.09
Bank Nifty	56,754.70	-201.3	-0.35	-1.23	11.15
Nifty Midcap 100	58,642.20	-517.75	-0.88	-1.85	2.07
Nifty Smallcap 100	18,763.45	-192.8	-1.02	-1.53	-1.04
S&P 500	6,259.75	-20.71	-0.33	1.00	6.67
DJIA	44,371.51	-279.13	-0.63	-0.28	4.67
Nasdaq 100	22,780.60	-48.66	-0.21	1.35	8.61
Nikkei 225	39,569.68	-76.68	-0.19	-1.04	0.67
Hang Seng	24,139.57	111.2	0.46	-0.34	23.01
Shanghai Com	3,510.18	0.50	0.01	1.52	7.59

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,149.85	56,754.70
Support	25,080 & 25,980	56,500 & 56,250
Resistance	25,280 & 25,560	57,072 & 57,370

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,998.56	17,102.78	-5,104.22
DII Cash Market	15,728.51	12,169.88	3,558.63

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
IndusInd Bank	2519.60	4.62	7,242.24
Maruti Suzuki	1835.20	1.38	770.85
Tata Steel	1173.80	0.82	4,468.65
Bajaj Finance	2220.60	0.76	2,679.17
Bajaj Finserv	858.85	0.70	3,849.54
Top Losers			
Bharti Airtel	3266.00	-3.43	7,635.55
Asian Paints	3073.20	-2.82	3,041.61
HDFC Life	8067.00	-2.63	539.58
Apollo Hospital	258.30	-2.55	13,109.86
Shriram Finance	4218.70	-2.37	556.46

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	70.36	2.51	-7.34
WTI (USD/bbl)	68.45	2.82	-6.40
Gold Spot (USD/t oz.)	3,355.59	0.95	26.25
USD/INR	85.80	-0.18	0.18
10 Year G-Sec India	6.299	-0.27	-7.11
US 10 Year Bond	4.409	1.37	-3.49

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

The key benchmark indices closed deep in the red on Friday, marking the third day of losses as investors dealt with global trade concerns and poor IT sector data.

Global

Wall Street closed down, with Meta Platforms dragging on the S&P 500, as President Donald Trump escalated his tariff war against Canada, exacerbating the uncertainties around US trade policy.

Japanese markets gave up early gains to end lower. The Nikkei average dipped 0.19% to 39,569.68 while the broader Topix index settled 0.39% higher at 2,823.24.

China stocks gave up most of their gains and closed flat, weighed down by a drop in bank shares, while Hong Kong shares held on to gains after a Goldman upgrade.

Commodities & Currency :

The Indian rupee remained on the defensive for much of the week, with minor losses as expected foreign portfolio withdrawals added to pressure from the White House's ongoing tariff threats.

Gold prices increased by more than 1% on Friday as investors sought safe-haven assets following US President Donald Trump's announcement of fresh tariffs, while silver touched its highest level in almost 13 years.

News:

Hindustan Unilever shares closed 4.6% higher, a day after the Dove soap maker appointed a senior executive from its parent Unilever with "a strong track record" as CEO.

India's northeastern state of Assam has put its flagship green hydrogen policy on hold, government and industry sources said, surprising investors already hit by a cut in incentives for clean energy projects.

The Indian government's net direct tax collection declined 1.3% year on year to 5.6 trillion rupees between April 1 and July 10, according to a statement.

India's Avenue Supermarts, which operates the DMart grocery chain, reported a slight drop in first-quarter profit as increasing operational costs and rising competition from rapid commerce competitors ate into margins.

India has rejected Australia's push for deeper tariff cuts on dairy and alcohol, hampering efforts to conclude the second phase of a trade pact by year-end, two Indian government sources said.

Enviro Infra Engineers surged 12.19% after the company stated that it has acquired a Rs 400 crore project from the Maharashtra Industrial Development Corporation (MIDC) to mitigate pollution in the Panchganga River.

In Q1 FY26, the Indian Renewable Energy Development Agency (IREDA) had a 35.7% decrease in consolidated net profit to Rs 246.88 crore, despite a 29.7% increase in total income to Rs 1,959.84 crore compared to Q1 FY25.