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# Daily Market Insight

*~ Where the market left its footprints* 14th August 2025

| Indices | Closing Level | Change Value | Change (%) | Performance MTD (%) | Performance YTD (%) |
|---|---|---|---|---|---|
| Global | | | | | |
| Nifty 50 | 24,619.35 | 131.95 | 0.54 | 0.22 | 3.69 |
| BSE Sensex | 80,539.91 | 304.32 | 0.38 | -0.07 | 2.59 |
| Bank Nifty | 55,181.45 | 137.75 | 0.25 | -0.78 | 8.07 |
| Nifty Midcap 100 | 56,681.50 | 356.65 | 0.63 | 0.08 | -1.34 |
| Nifty Smallcap 100 | 17,613.95 | 115.85 | 0.66 | -0.31 | -7.10 |
| S&P 500 | 6,466.58 | 20.82 | 0.32 | 3.66 | 10.19 |
| DJIA | 44,922.27 | 463.66 | 1.04 | 3.06 | 5.97 |
| Nasdaq 100 | 23,849.04 | 9.84 | 0.04 | 4.77 | 13.70 |
| Nikkei 225 | 43,274.67 | 556.5 | 1.30 | 6.07 | 10.09 |
| Hang Seng | 25,613.67 | 643.99 | 2.58 | 4.51 | 30.53 |
| Shanghai Com | 3,683.47 | 17.55 | 0.48 | 3.47 | 12.90 |

*Source: Bloomberg*

| Levels | Nifty 50 | Bank Nifty |
|---|---|---|
| Closing | 24,619.35 | 55,181.45 |
| Support | 24,450 & 24,230 | 54,890 & 54,540 |
| Resistance | 24,700 & 24,770 | 55,560 & 56,111 |

| FII DII Activity | Gross Purchase | Gross Sale | Net Purchase/Sale |
|---|---|---|---|
| FII Cash Market | 11,350.06 | 14,994.49 | -3,644.43 |
| DII Cash Market | 13,982.46 | 8,358.67 | 5,623.79 |

*Source: Bloomberg*

| Trading Activity | Close Price | 1D (%) change | Volume ('000) |
|---|---|---|---|
| **Top Gainers** | | | |
| Apollo Hospital | 7808.50 | 7.90 | 2291.65 |
| Hindalco | 700.50 | 5.01 | 13151.36 |
| Dr Reddys Labs | 1253.40 | 2.71 | 1192.51 |
| Hero Motocorp | 4768.70 | 2.66 | 1342.79 |
| Cipla | 1561.00 | 2.59 | 1859.77 |
| **Top Losers** | | | |
| IndusInd Bank | 773.45 | -1.23 | 4114.21 |
| Adani Ports | 1319.60 | -0.82 | 1205.66 |
| Titan Company | 3466.80 | -0.57 | 360.47 |
| ITC | 414.10 | -0.54 | 10874.91 |
| UltraTechCement | 12401.00 | -0.39 | 207.36 |

*Source: Bloomberg*

| Commodity, Currency & Debt | LTD | 1D (%) change | YTD (%) |
|---|---|---|---|
| Brent (USD/bbl) | 65.61 | -0.79 | -13.75 |
| WTI (USD/bbl) | 62.61 | -0.89 | -14.39 |
| Gold Spot (USD/t oz.) | 3,351.92 | 0.11 | 26.11 |
| USD/INR | 87.49 | 0.24 | 2.15 |
| 10 Year G-Sec India | 6.481 | -0.17 | -4.43 |
| US 10 Year Bond | 4.238 | -1.18 | -7.24 |

*Source: Bloomberg*

## MARKET COMMENTARY

**Equity :**

**India**

Indian markets climbed on Wednesday, leading a global rally, as weak US inflation data supported rate cut hopes and increased desire for riskier assets, while easing domestic inflation and advances in Apollo Hospitals and Hindalco provided additional support. As of 6:40 a.m., the GIFT Nifty was trading at 24,686, down 0.10% or 24 points. The implied open for the NSE Nifty 50 is likely to be 25 points lower than Wednesday's close.

**Global**

The benchmark S&P 500 and Nasdaq indices hit new closing highs for the second straight day on Wednesday on hopes that the Federal Reserve was getting close to a monetary easing cycle.

Japan's Nikkei share average breached the 43,000-mark for the first time, with the broader Topix index also scaling a fresh all-time peak, tracking Wall Street's overnight gains and extending the rally to a sixth straight session.

Hong Kong stocks rallied, propelling the benchmark gauge to its best one-day performance in three months, as tame US inflation data fuelled rate-cut expectations and corporate earnings prospects brightened.

**Commodities & Currency :**

The Indian rupee gained the most in more than a month on Wednesday as softer US inflation data bolstered hopes of a Federal Reserve rate cut in September, weighing on the dollar.

Gold rose, lifted by a weaker dollar and falling Treasury yields, as mild US inflation data cemented expectations for a Federal Reserve rate cut in September and nudged up bets on additional easing later this year.

**News:**

Indian Prime Minister Narendra Modi is likely to meet President Donald Trump during a visit to the United States next month to attend the UN General Assembly meeting, the Indian Express newspaper reported.

United Spirits reported quarterly profit below analysts' estimates, as higher marketing spends overshadowed affluent Indians' sustained demand for premium liquor.

Indian IT services company Infosys said that it would take a 75% stake in Versent Group, a wholly owned unit of Australia's Telstra Group, for A$233.3 million ($153 million).

Domino's India operator Jubilant Foodworks beat first-quarter profit estimates by a wide margin as lower-priced menu items and free deliveries bolstered demand even as other fast-food franchisees struggled.

Indian fintech firm Paytm's Payment Services unit has got 'in-principle' approval from the country's central bank to operate as an online payment aggregator.

India's state-run refiner Bharat Petroleum Corp (BPCL) reported a better-than-expected quarterly profit, helped by a dip in costs and improved fuel demand.