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Daily Market Insight

~ Where the market left its footprints 14th October 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,227.35	-58.00	-0.23	1.57	6.25
BSE Sensex	82,327.05	-173.77	-0.21	1.66	4.87
Bank Nifty	56,625.00	15.25	0.03	2.31	10.90
Nifty Midcap 100	58,762.35	64.95	0.11	3.04	2.28
Nifty Smallcap 100	18,101.75	-31.6	-0.17	1.95	-4.53
S&P 500	6,654.72	102.21	1.56	-0.84	13.40
DJIA	46,067.58	587.98	1.29	-0.80	8.67
Nasdaq 100	24,750.25	528.5	2.18	-0.20	18.00
Nikkei 225	48,088.80	-491.64	-1.01	7.94	22.34
Hang Seng	25,889.48	-400.84	-1.52	-5.12	31.93
Shanghai Com	3,889.50	-7.53	-0.19	-1.13	19.22

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,227.35	56,625.00
Support	25,000 & 24,890	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	8,085.41	8,325.51	-240.10
DII Cash Market	14,960.78	12,627.36	2,333.42

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Ports	1437.80	2.02	2245.06
Bajaj Auto	9066.00	1.34	374.53
Bajaj Finance	1036.75	1.26	7684.52
Shriram Finance	672.15	1.07	2469.94
Interglobe Avi	5787.50	0.92	669.75
Top Losers			
Tata Motors	660.75	-2.68	33288.65
Wipro	245.13	-1.44	6717.59
HUL	1493.20	-1.43	5859.36
Infosys	2492.80	-1.43	1114.75
Max Healthcare	1143.30	-1.13	2376.34

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	63.43	1.12	-16.55
WTI (USD/bbl)	59.60	1.19	-18.50
Gold Spot (USD/t oz.)	4,102.42	2.11	54.35
USD/INR	88.68	0.02	3.53
10 Year G-Sec India	6.520	-0.26	-3.86
US 10 Year Bond	4.057	0.62	-11.20

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian equities fell slightly on Monday, 13th October, pulled down by IT sectors and followed losses in Asia as the United States announced fresh trade threats against China, while investors anticipated September retail inflation data.

Global

Wall Street's main indexes ended sharply higher on Monday, led by gains in Broadcom and other chipmakers, after President Donald Trump struck a conciliatory tone about renewed US-China trade tensions, easing investor worries.

Japanese markets are closed for a holiday.

Hong Kong stocks fell for a sixth day on Monday, the longest losing streak in nine months, as renewed US-China trade tensions kept investors on edge and dampened risk appetite.

Commodities & Currency :

The Indian rupee fell within a whisker of its all-time low on Monday, but held above it due to expected central bank intervention, with news of an Indian trade delegation's visit to the United States providing some comfort.

Gold soared beyond $4,100 per ounce for the first time on Monday, setting another record on renewed US-China trade tensions and forecasts of US interest rate reduction, while silver also reached an all-time high.

News:

HCLTech posted a bigger-than-expected second-quarter revenue on a boost from its engineering and R&D services segment and retained its annual forecast.

India and the United States are set to hold trade talks this week, with India pledging to import US energy and gas as it aims to address Washington's concerns over its Russian oil purchases, an official said.

India's power planning authority has drawn up a 6.4 trillion rupees ($77 billion) transmission plan to move more than 76 gigawatts of hydroelectric capacity from the Brahmaputra basin by 2047 to meet rising electricity demand, the Central Electricity Authority (CEA) said.

Tata Capital, India's third-largest non-bank lender by revenue, was muted in its debut trade on Monday, valuing the firm at 1.4 trillion rupees ($15.78 billion), with investors seemingly not that keen on the first listing by the storied Tata Group in nearly two years.

India's small steelmakers are dealing with weak demand, swelling inventories, and falling pricing, highlighting a construction slowdown despite implementing the country's largest consumer tax cuts in eight years to spur economy and counter stiff US tariffs.

India's annual retail inflation slowed to an eight-year low of 1.54% in September, government data showed on Monday, as food prices eased, leaving room for the central bank to cut rates one more time when it meets in December.