AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 15th October 2025, 8:30am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,145.50	-81.85	-0.32	1.24	5.91
BSE Sensex	82,029.98	-297.07	-0.36	1.29	4.49
Bank Nifty	56,496.45	-128.55	-0.23	2.08	10.65
Nifty Midcap 100	58,324.40	-437.95	-0.75	2.27	1.52
Nifty Smallcap 100	17,940.15	-161.6	-0.89	1.04	-5.38
S&P 500	6,644.31	-10.41	-0.16	-1.00	13.22
DJIA	46,270.46	202.88	0.44	-0.37	9.15
Nasdaq 100	24,579.32	-170.93	-0.69	-0.89	17.18
Nikkei 225	46,847.32	-1241.48	-2.58	5.15	19.18
Hang Seng	25,441.35	-448.13	-1.73	-6.76	29.65
Shanghai Com	3,865.23	-24.27	-0.62	-1.75	18.47

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,145.50	56,496.45
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	10,847.86	12,356.39	-1,508.53
DII Cash Market	16,384.50	12,723.37	3,661.13

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Max Healthcare	1161.50	1.59	1965.36
Wipro	248.42	1.34	7888.61
Tech Mahindra	1468.00	1.18	1430.71
Apollo Hospital	7759.00	1.15	413.86
Power Grid Corp	287.50	0.47	7667.65
Top Losers			
Dr Reddys Labs	1237.30	-1.99	1944.91
Bharat Elec	402.40	-1.71	10789.65
Bajaj Finance	1019.15	-1.70	7668.36
TCS	2960.30	-1.56	3611.42
NTPC	336.65	-1.48	7545.85

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	62.46	-1.36	-17.74
WTI (USD/bbl)	58.78	-1.19	-19.62
Gold Spot (USD/t oz.)	4,146.78	0.89	56.02
USD/INR	88.80	-0.14	3.68
10 Year G-Sec India	6.506	-0.22	-4.06
US 10 Year Bond	4.009	-0.57	-12.25

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indices dipped for the second straight session on Tuesday, 14th October, pressured by banking sectors, but outperformed other Asian peers as US-China trade worries hampered risk appetite. As of 6:36 a.m., the GIFT Nifty was trading 0.04% higher at 25,276 points, indicating a quiet but bullish open.

Global

Wall Street ended mixed on Tuesday as investors digested mostly positive quarterly results from big US banks and the ongoing US-China trade war.

Japanese shares sank on Tuesday after a long weekend, clocking their sharpest one-day drop since April, as investors fretted over uncertainty surrounding the country's next premier and persistent US-China trade tensions.

Hong Kong stocks dropped for a seventh consecutive day, marking the benchmark's longest losing stretch since January 2024, as investors weighed geopolitical risks after a re-escalation of China-US tensions.

Commodities & Currency :

The rupee remained near its record low for much of the session on Tuesday as risk appetite declined amid renewed US-China trade concerns, but potential central bank intervention saved the local currency from falling below its all-time low.

Gold notched a fresh record high above the $4,100 level, lifted by expectations of a rate cut this month by the US Federal Reserve and an investor flight to safety after a flare-up in trade tensions between Washington and Beijing.

News:

Google said on Tuesday it would invest $15 billion over five years to set up an artificial intelligence data centre in India's southern state of Andhra Pradesh, its biggest ever investment in the world's most populous nation.

LG Electronics India soared 53.4% in its trading debut, overtaking its South Korean parent's market value, as investors bet big on its manufacturing and retail ambitions in the country, fuelled by a surge in consumer demand.

Indian textile exporters are seeking new buyers in Europe and offering discounts to existing US customers to cushion the blow from steep US tariffs of as much as 50%, industry executives said.

India's wholesale price inflation in September eased to 0.13% year-on-year from 0.52% in the previous month, helped by a decline in food and fuel prices, government data showed.

Indian software services provider Infosys said it has received a contract worth 1.2 billion pounds ($1.59 billion) from UK's National Health Services Business Services Authority to replace its existing payroll platform.