AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 16th September 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,069.20	-44.8	-0.18	1.80	5.59
BSE Sensex	81,785.74	-118.96	-0.15	1.77	4.18
Bank Nifty	54,887.85	78.55	0.14	1.64	7.50
Nifty Midcap 100	58,486.10	258.90	0.44	2.92	1.80
Nifty Smallcap 100	18,127.00	137.1	0.76	3.59	-4.39
S&P 500	6,615.28	30.99	0.47	3.11	12.72
DJIA	45,883.45	49.23	0.11	1.30	8.24
Nasdaq 100	24,293.78	201.59	0.84	4.57	15.82
Nikkei 225	44,768.12	395.62	0.89	6.11	13.89
Hang Seng	26,446.56	58.4	0.22	3.24	34.77
Shanghai Com	3,860.50	-10.09	-0.26	-0.39	18.33

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25.069.20	54,887.85
Support	25,040 & 24,930	54,560 & 53,380
Resistance	25,170 & 25,240	55,020 & 55,330

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	8,169.16	9,437.75	-1,268.59
DII Cash Market	10,173.17	8,239.84	1,933.33

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Jio Financial	315.35	1.33	14414.95
Bajaj Finance	1009.85	0.66	9989.75
Eternal	323.30	0.59	16287.17
UltraTechCement	12435.00	0.53	179.53
Reliance	1399.30	0.31	5396.70
Top Losers			
Asian Paints	2502.60	-1.72	583.05
Cipla	1548.30	-1.67	758.98
M&M	3530.30	-1.66	2550.44
Shriram Finance	623.65	-1.45	3643.67
Dr Reddys Labs	1300.80	-1.21	1331.18

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.47	0.73	-11.14
WTI (USD/bbl)	63.35	1.05	-13.37
Gold Spot (USD/t oz.)	3,677.09	0.93	38.35
USD/INR	88.22	0.07	3.00
10 Year G-Sec India	6.496	0.14	-4.20
US 10 Year Bond	4.039	0.05	-11.59

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity indices fell slightly on Monday, led by information technology stocks, as investors traded cautiously ahead of an expected rate cut by the US Federal Reserve at its policy meeting this week. The GIFT Nifty was trading above 25,150 early Tuesday. The benchmark Nifty 50 futures contract was trading 0.10% lower at 25,156.5 as of 6:50 a.m., indicating a slow start for Indian markets.

Global

The three major US market indices closed higher on Monday, with the S&P 500 and Nasdaq setting intraday records, as investors anticipate the Federal Reserve's key policy meeting later this week.

Japanese stock markets were closed on Monday owing to a holiday.

Chinese markets closed neutral, with the Shanghai Composite falling 0.26% and the Shenzhen Component rising 0.63%, as weaker-than-expected industrial output, disappointing retail sales, and ongoing housing market weakness impacted on confidence.

Commodities & Currency :

The Indian rupee closed practically flat, as the benefit of a broadly weaker dollar was offset by ongoing hedging demand from importers and lackluster foreign portfolio flows.

Gold reached an all-time high on Monday, boosted by a weaker dollar and lower Treasury yields, as investors braced for a critical Federal Reserve meeting this week that may set the tone for the rest of the year.

News:

India's wholesale prices gained 0.52% year on year in August, reversing a 0.58% decrease the previous month, according to official statistics released.

The Reserve Bank of India has increased its participation in the offshore non-deliverable forward (NDF) market to support the rupee, which has been under pressure due to shifting demand-supply dynamics, bankers said.

India's palm oil imports increased in August to their highest level in more than a year, as competitive pricing relative to soyoil led refiners to boost up purchases ahead of the festive season, according to a prominent trade association.

India's merchandise trade deficit fell to $26.49 billion in August, down from $27.35 billion in July, as a reduction in exports after US President Donald Trump raised tariffs on Indian goods was offset by a slowdown in imports.

Russian-backed Indian refiner Nayara Energy is seeking Indian government help to source equipment and materials needed for maintenance as European Union sanctions make it difficult to secure key items, three people familiar with the matter said.

India and the United States will hold trade talks, raising hopes for a breakthrough weeks after President Donald Trump imposed punitive tariffs on the South Asian nation for buying Russian oil.