Daily Market Insight

~ Where the market left its footprints 17th October 2025, 8:59am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,585.30	261.75	1.03	3.02	7.76
BSE Sensex	83,467.66	862.23	1.04	3.07	6.32
Bank Nifty	57,422.55	622.65	1.10	3.75	12.46
Nifty Midcap 100	59,241.15	271.15	0.46	3.88	3.12
Nifty Smallcap 100	18,131.85	43.8	0.24	2.12	-4.37
S&P 500	6,629.07	-41.99	-0.63	-1.22	12.96
DJIA	45,952.24	-301.07	-0.65	-1.05	8.40
Nasdaq 100	24,657.24	-88.12	-0.36	-0.58	17.55
Nikkei 225	48,277.74	605.07	1.27	8.37	22.82
Hang Seng	25,888.51	-22.09	-0.09	-5.13	31.93
Shanghai Com	3,916.23	4.02	0.10	-0.45	20.04

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,585.30	57,422.55
Support	25,159 & 25,000	56,130 & 56.900
Resistance	25,670 & 25,780	57,600 & 57,900

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,739.14	13,741.85	997.29
DII Cash Market	19,840.85	19,840.85	4,076.20

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Nestle	1276.60	4.52	6927.37
TATA Cons. Prod	1149.30	3.15	2383.41
Kotak Mahindra	2205.40	2.60	6738.42
Titan Company	3640.30	2.57	1528.12
Axis Bank	1196.30	2.28	17747.17
Top Losers			
HDFC Life	742.85	-2.40	10209.10
Eternal	347.85	-1.83	91194.46
Shriram Finance	672.50	-0.69	5309.78
SBI Life Insurance	1835.70	-0.27	969.32
Infosys	1471.50	-0.20	8005.75

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	61.07	-1.36	-19.57
WTI (USD/bbl)	57.50	-1.32	-21.37
Gold Spot (USD/t oz.)	4,316.05	2.58	62.39
USD/INR	87.83	0.27	2.55
10 Year G-Sec India	6.501	0.32	-4.14
US 10 Year Bond	3.942	-0.82	-13.72

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices climbed to more than three-month highs on Thursday, 16th October, powered by Nestle's India business and Axis Bank following earnings, as rate-sensitive sectors surged on rising expectations of monetary easing.

Global

US bank stocks, including Zions Bancorporation, Jefferies, and Western Alliance, fell sharply on Thursday as investors grew uneasy about risk in the sector, which has been shaken by exposure to two auto bankruptcies.

Japanese markets ended sharply higher after the Japan Innovation Party emerged as a possible coalition partner for the LDP ahead of a parliamentary vote to decide the prime minister expected next week.

China's markets rebounded, with the Shanghai Composite up 1.22% and the Shenzhen Component up 1.73%, as deflation concerns boosted stimulus hopes and tech and clean energy stocks led the gains.

Commodities & Currency :

The Indian rupee rose to a one-month high, aided by significant central bank intervention the day before and early optimism about US-India trade talks.

Gold soared past $4,300 an ounce for the first time on Thursday as tensions between the US and China pushed investors to safe haven assets, while rising expectations of a Federal Reserve rate cut this month amplified the momentum.

News:

Nestle India posted a marginal increase in second-quarter profit on Thursday, benefiting from improving urban demand for items such as Maggi noodles and Nescafe coffee, sending its shares up about 5% to a one-year high.

India's second-largest IT services exporter Infosys raised the lower end of its annual revenue growth forecast after second-quarter revenue beat estimates on strong performance in financial services and manufacturing.

India plans to cut imports of liquefied petroleum gas from the Middle East as its state refiners look to boost purchases from the US, sources with knowledge of the matter said, bolstering New Delhi's efforts to secure a broader trade deal with Washington.

Indian quick commerce platform Zepto said it has raised $450 million in a fund raise that valued the firm at $7 billion.

Russia said on Thursday it was confident its energy partnership with India would continue, after US President Donald Trump said India had promised to stop buying oil from Moscow.

Indian IT services company LTIMindtree reported bigger-than-expected quarterly earnings on Thursday on strong performance in the banking, financial services and insurance (BFSI) sector, its largest segment.