AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 18th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,631.30	11.95	0.05	0.27	3.74
BSE Sensex	80,597.66	57.75	0.07	0.00	2.66
Bank Nifty	55,341.85	160.4	0.29	-0.50	8.38
Nifty Midcap 100	56,504.25	-177.25	-0.31	-0.23	-1.65
Nifty Smallcap 100	17,547.45	-66.5	-0.38	-0.68	-7.45
S&P 500	6,449.80	18.74	0.29	3.66	10.19
DJIA	44,946.12	34.86	0.08	3.06	5.97
Nasdaq 100	23,712.04	-120.37	-0.51	4.77	13.70
Nikkei 225	43,378.31	729.05	1.71	4.53	8.50
Hang Seng	25,270.07	-249.25	-0.98	4.13	30.05
Shanghai Com	3,696.77	30.33	0.83	2.99	12.38

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,631.30	55,341.85
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	13,646.01	15,572.77	-1,926.76
DII Cash Market	13,144.45	9,248.77	3,895.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Wipro	246.81	2.14	12857.23
Eternal	318.40	1.94	45892.25
HDFC Life	788.75	1.56	2861.62
Infosys	1447.70	1.48	12902.35
Asian Paints	2528.70	1.14	1088.55
Top Losers			
Tata Steel	155.30	-3.05	47256.13
Adani Ports	1300.30	-1.46	2298.53
Tech Mahindra	1486.70	-1.30	1715.17
Hero Motocorp	4708.10	-1.27	373.86
Bharat Elec	384.90	-1.02	8046.55

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.92	0.44	-13.18
WTI (USD/bbl)	62.96	0.49	-13.91
Gold Spot (USD/t oz.)	3,358.41	0.08	26.36
USD/INR	87.57	-0.08	2.24
10 Year G-Sec India	6.400	-1.25	-5.62
US 10 Year Bond	4.328	0.82	-6.81

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares ended flat on Thursday ahead of US–Russia talks on Ukraine as IT and pharma stocks rose after a US–China tariff truce extension and rising hopes of a Fed rate cut.

Global

The blue-chip Dow Jones ended higher after hitting an intraday record high on Friday, as UnitedHealth's shares jumped after Berkshire Hathaway raised its stake, but other Wall Street indexes slipped as mixed data clouded the Federal Reserve's next monetary policy move

Japan's Nikkei advanced, capping a week in which the benchmark index climbed to a record high, as the yen weakened and data showed the nation's economy was surprisingly resilient.

Hong Kong stocks posted the first back-to-back decline in two weeks on Friday after China's July economic data fell short of estimates and a raft of disappointing earnings reports put investors in a risk-averse mood.

Commodities & Currency :

The Indian rupee declined on Thursday with traders treading lightly ahead of the Trump-Putin summit, although S&P's upgrade offered a silver lining.

Gold prices held steady on Friday, but were headed for a weekly loss after hot inflation data trimmed rate-cut bets, while the market focus shifted to talks between US President Donald Trump and his Russian counterpart Vladimir Putin.

News:

India's government will slash the consumption tax it charges consumers and businesses by October, a top official said on Friday, hours after Prime Minister Narendra Modi announced sweeping tax reforms to boost the economy in the face of a trade conflict with Washington.

A planned visit by US trade negotiators to India from August 25-29 has been called off, a source said, delaying talks on a proposed trade agreement and dashing hopes of relief from additional US tariffs on Indian goods from August 27.

India is confident of meeting its fiscal deficit target of 4.4% for the current fiscal year, according to a government source with knowledge of the matter, despite its plans to cut consumption tax later this year.

State refiner Indian Oil Corp (IOC) has bought two million barrels of US West Texas Intermediate crude for October delivery, three trade sources said.

India's wholesale prices in July fell 0.58% year-on-year, from a 0.13% decline in the previous month, dragged down by a drop in food prices, government data showed.

India, the world's second-biggest producer of crude steel, has imposed anti-dumping duty on some steel shipments from Vietnam, the Ministry of Commerce and Industry said.