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# Daily Market Insight

***~ Where the market left its footprints*** 18th September 2025, 8:50AM

| Indices | Closing Level | Change Value | Change (%) | Performance MTD (%) | Performance YTD (%) |
|---|---|---|---|---|---|
| Global | | | | | |
| Nifty 50 | 25,330.25 | 91.15 | 0.36 | 2.86 | 6.69 |
| BSE Sensex | 82,693.71 | 313.02 | 0.38 | 2.90 | 5.33 |
| Bank Nifty | 55,493.30 | 345.7 | 0.63 | 2.76 | 8.68 |
| Nifty Midcap 100 | 58,848.55 | 49.00 | 0.08 | 3.56 | 2.43 |
| Nifty Smallcap 100 | 18,423.20 | 124.85 | 0.68 | 5.29 | -2.83 |
| S&P 500 | 6,600.35 | -6.41 | -0.10 | 2.88 | 12.47 |
| DJIA | 46,018.32 | 260.42 | 0.57 | 1.60 | 8.55 |
| Nasdaq 100 | 24,223.69 | -50.56 | -0.21 | 4.27 | 15.48 |
| Nikkei 225 | 44,790.38 | -111.89 | -0.25 | 6.17 | 13.95 |
| Hang Seng | 26,908.39 | 469.88 | 1.78 | 5.04 | 37.12 |
| Shanghai Com | 3,876.34 | 14.48 | 0.37 | 0.02 | 18.81 |

*Source: Bloomberg*

| Levels | Nifty 50 | Bank Nifty |
|---|---|---|
| Closing | 25.330.25 | 55,493.30 |
| Support | 25,245 & 25,150 | 55,180 & 55,000 |
| Resistance | 25,425 & 25,541 | 55,750 & 55,950 |

| FII DII Activity | Gross Purchase | Gross Sale | Net Purchase/Sale |
|---|---|---|---|
| FII Cash Market | 11,509.41 | 12,633.95 | -1,124.54 |
| DII Cash Market | 13,719.48 | 11,425.95 | 2,293.53 |

*Source: Bloomberg*

| Trading Activity | Close Price | 1D (%) change | Volume ('000) |
|---|---|---|---|
| **Top Gainers** | | | |
| TATA Cons. Prod | 1136.30 | 4.05 | 3361.33 |
| SBI | 857.15 | 3.08 | 17243.94 |
| Bharat Elec | 412.20 | 2.31 | 31367.48 |
| Maruti Suzuki | 15801.00 | 1.46 | 624.99 |
| Kotak Mahindra | 2050.30 | 1.41 | 4783.44 |
| **Top Losers** | | | |
| Bajaj Finserv | 2057.00 | -1.12 | 1199.87 |
| Titan Company | 3523.00 | -0.95 | 659.87 |
| ITC | 409.30 | -0.92 | 14113.88 |
| HDFC Life | 1804.00 | -0.81 | 706.81 |
| SBI Life Insurance | 768.05 | -0.81 | 2329.05 |

*Source: Bloomberg*

| Commodity, Currency & Debt | LTD | 1D (%) change | YTD (%) |
|---|---|---|---|
| Brent (USD/bbl) | 67.79 | -0.99 | -10.72 |
| WTI (USD/bbl) | 63.85 | -1.04 | -12.64 |
| Gold Spot (USD/t oz.) | 3,663.67 | -0.72 | 37.84 |
| USD/INR | 87.81 | 0.28 | 2.52 |
| 10 Year G-Sec India | 6.473 | -0.29 | -4.55 |
| US 10 Year Bond | 4.068 | -0.47 | -10.96 |

*Source: Bloomberg*

## MARKET COMMENTARY

**Equity :**

**India**

Indian equities rose on Wednesday, 17th September, boosted by broad-based gains, as progress in trade talks with the US and anticipation of a rate cut by the US Federal Reserve later in the day lifted investor confidence. The GIFT Nifty was up 0.26%, or 65.55 points, at 25.488.50 as of 6:31 a.m. This meant that the NSE Nifty 50 will likely open higher on Thursday.

**Global**

The Nasdaq and the S&P 500 closed lower in choppy trading on Wednesday, after the US Federal Reserve cut interest rates by an expected 25 basis points and Fed Chair Jerome Powell cited the weak job market.

Japan stocks were lower after the close on Wednesday, as losses in the Paper & Pulp, Transport and Communication sectors led shares lower.

Hong Kong stocks hit a four-year high on Wednesday, led by technology firms, as investors bet on artificial intelligence innovations while the policy address by Chief Executive John Lee Ka-chiu boosted sentiment for supportive measures.

**Commodities & Currency :**

A weaker dollar ahead of an anticipated rate decrease by the US Federal Reserve and positive optimism from trade discussions with Washington helped the Indian rupee gain ground.

Gold prices fell nearly 1%, retreating from a record high scaled earlier in the session, as market participants parsed remarks from Federal Reserve Chair Jerome Powell.

**News:**

The Federal Reserve cut interest rates by a quarter of a percentage point on Wednesday and indicated that borrowing costs will continue to fall throughout the year, responding to concerns about job market weakness in a move supported by the majority of President Donald Trump's central bank appointees.

Urban Company's shares soared 74% in their market debut on Wednesday, reaching a $3 billion valuation, after one of 2025's most actively subscribed IPOs signaled investor confidence in the company's domination of India's expanding home services sector.

Sandeep Poundrik, India's steel secretary, stated at the FT Live Energy Transition Summit India that while the European Union's carbon price will have an influence on steel exports, the country's steel industry will not be directly impacted by US tariffs.

India's rice stocks in government warehouses climbed over 14% from a year earlier to a record high for early September, while wheat inventories reached a four-year peak on stronger buying from farmers, official data showed

India's Adani Group and its partners are set to double the capacity of a $840 million container terminal in Colombo months ahead of schedule, despite relinquishing $553 million in US funding, an executive at partner firm John Keells Holdings told Reuters.