AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 19th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,876.95	245.65	1.00	1.27	4.78
BSE Sensex	81,273.75	676.09	0.84	0.84	3.52
Bank Nifty	55,734.90	393.05	0.71	0.21	9.15
Nifty Midcap 100	57,113.15	608.90	1.08	0.84	-0.59
Nifty Smallcap 100	17,790.40	242.95	1.38	0.69	-6.17
S&P 500	6,444.49	-5.3	-0.08	3.31	9.81
DJIA	44,891.13	-54.99	-0.12	2.99	5.89
Nasdaq 100	23,683.83	-27.82	-0.12	4.04	12.91
Nikkei 225	43,714.31	336.00	0.77	7.14	11.21
Hang Seng	25,176.85	-93.22	-0.37	2.73	28.30
Shanghai Com	3,728.03	31.26	0.85	4.72	14.27

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,876.95	55,734.90
Support	24,770 & 24,700	55,550 & 55,200
Resistance	25,030 & 25,250	56,170 & 56,430

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	20,070.25	19,519.40	550.85
DII Cash Market	18,649.74	14,545.93	4,103.81

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Maruti Suzuki	14068.00	8.75	2154.78
Hero Motocorp	4984.00	5.86	3698.09
Bajaj Finance	905.20	5.08	16277.78
Nestle	1144.10	5.02	3478.23
Bajaj Auto	8588.50	4.57	995.98
Top Losers			
ITC	406.30	-1.25	30950.81
L & T	3635.10	-1.14	1950.15
Eternal	314.90	-1.10	42357.08
Tech Mahindra	1471.20	-1.04	1249.41
NTPC	336.05	-0.97	6511.34

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.51	1.00	-12.41
WTI (USD/bbl)	63.40	0.96	-13.31
Gold Spot (USD/t oz.)	3,333.29	-0.09	25.41
USD/INR	87.35	0.24	1.99
10 Year G-Sec India	6.497	1.52	-4.19
US 10 Year Bond	4.335	0.45	-0.12

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian Benchmark shares jumped about 1% on Monday as the government's plans for sweeping changes to the goods and services tax (GST) regime is expected to boost consumption in an economy where growth is threatened by steep US tariffs. The GIFT Nifty was trading 0.22% or 54 points lower at 24,958.80 as of 8:20 a.m. This implied the NSE Nifty 50 may open around 10 points lower than its previous close.

Global

Wall Street's main indices closed roughly flat on Monday, after struggling for direction while investors awaited a raft of corporate earnings reports from major retailers for more signs about the state of the economy and the Federal Reserve's annual symposium in Jackson Hole.

Japan's Nikkei share average extended its gains from last week to end at a record high, as a weaker yen pushed automakers' stocks higher.

China stocks closed at their highest level since 2015 on Monday, extending a months-long rally driven by easing trade tensions and abundant liquidity, while pushing market capitalization to a record peak.

Commodities & Currency :

The Indian rupee rose on Monday, boosted by the rally in local equities on Prime Minister Narendra Modi's planned tax cuts, while forward premiums and volatility expectations barely budged following the Trump-Putin meeting.

Gold prices were largely steady, as investors focused on US President Donald Trump's meeting with Ukrainian and European leaders, and the Federal Reserve's annual symposium in Jackson Hole this week.

News:

India aims to slash taxes on small cars and insurance premiums as part of a sweeping reform of its goods and services tax (GST), a government source said on Monday, sparking a rally in Indian stock markets.

Indian Foreign Minister Subrahmanyam Jaishankar and his Chinese counterpart Wang Yi discussed border peace, trade issues and bilateral exchanges, aiming to strengthen cooperation between the two countries.

India's unemployment rate fell to 5.2% in July from 5.6% in the previous month, the statistics ministry said, as rural hiring picked up ahead of the festival season and on agricultural activity.

India's market regulator proposed to reduce the minimum size of share sale for large companies looking to list their stock in a bid to simplify fund-raising.

Mahanagar Telephone Nigam Ltd (MTNL) has defaulted on loan repayments worth 86.59 billion rupees ($990.48 million) to a group of seven public sector banks, the state-run telecom company said.

Hindustan Zinc will spend 38.23 billion rupees ($437.5 million) to set up a metals reprocessing plant, the Indian miner said, as a part of its plans to ramp-up capacity.