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Daily Market Insight

~ Where the market left its footprints 19th September 2025, 8:40AM

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,423.60	93.35	0.37	3.24	7.08
BSE Sensex	83,013.96	320.25	0.39	3.30	5.74
Bank Nifty	55,727.45	234.15	0.42	3.19	9.14
Nifty Midcap 100	59,073.20	224.65	0.38	3.96	2.82
Nifty Smallcap 100	18,476.95	53.75	0.29	5.59	-2.55
S&P 500	6,631.96	31.61	0.48	3.37	13.01
DJIA	46,142.42	124.1	0.27	1.87	8.85
Nasdaq 100	24,454.89	231.2	0.95	5.27	16.59
Nikkei 225	45,303.43	513.05	1.15	7.38	15.26
Hang Seng	26,544.85	-363.54	-1.35	3.62	35.27
Shanghai Com	3,831.66	-44.69	-1.15	-1.13	17.44

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25.423.60	55,727.45
Support	25,330 & 25,240	55,480 & 55,170
Resistance	25,540 & 25,660	55,959 & 56,160

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,838.11	11,471.42	366.69
DII Cash Market	14,451.22	11,124.66	3,326.56

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eternal	337.85	2.92	36575.26
HDFC Life	784.60	2.15	4824.42
Sun Pharma	1648.60	1.75	1832.39
Infosys	1540.60	1.20	9331.95
Cipla	1578.20	1.19	874.86
Top Losers			
Coal India	393.15	-1.65	5899.62
Tata Motors	711.20	-1.11	12199.36
Bajaj Finance	996.50	-1.09	9738.38
Trent	5144.00	-1.03	810.33
UltraTechCement	12626.00	-0.75	190.08

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.39	-0.82	-11.23
WTI (USD/bbl)	63.55	-0.78	-13.10
Gold Spot (USD/t oz.)	3,641.51	-0.50	37.01
USD/INR	88.13	-0.37	2.90
10 Year G-Sec India	6.514	0.63	-3.94
US 10 Year Bond	4.108	0.10	-10.08

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's benchmark shares surged on Thursday, 18th September, closing at 10-week highs, led by IT and pharmaceutical firms, following the US Federal Reserve's quarter-point rate cut and signs of easing trade tensions. As of 6:35 a.m., the GIFT Nifty was down 0.18%, or 46.50 points, to 24,469.50, implying that the NSE Nifty 50 would most certainly end its recent winning streak.

Global

Wall Street's main indexes closed at new highs on Thursday, a day after the Federal Reserve cut interest rates by a quarter-point, while chipmaker Intel surged after Nvidia agreed to increase its holding in the firm.

Japan's Nikkei share average rose to an intraday record high, boosted by technology shares, as the market reacted positively to the US Federal Reserve's widely anticipated 25-basis-point interest rate cut.

Hong Kong stocks fell after the Federal Reserve signalled a conservative approach on the pace of future easing.

Commodities & Currency :

The Indian rupee fell alongside its regional peers on Thursday as investors absorbed the US Federal Reserve's widely anticipated interest rate drop and cautious stance on further lowering benchmark borrowing costs.

Gold prices fell amid profit-taking, after the yellow metal scaled a record peak in the previous session, as markets assessed the Federal Reserve's stance on further interest rate cuts.

News:

The Securities and Exchange Board of India on Thursday dismissed allegations of stock manipulation against billionaire Gautam Adani and his group of companies made by US short-seller Hindenburg Research.

India's net direct tax collections rose over 9% YoY to 10.8 trillion rupees from April 1 to Sept 17, the government said. Direct taxes, which include corporate and personal tax, rose over 3% YoY to 12.4 trillion rupees on a gross basis during the period, the statement from the income tax department said.

India's state-run Oil India Ltd expects a $20 billion, TotalEnergies-operated Mozambique liquefied natural gas project in which it owns a part to commence development by the end of this year, according to its chairman, Ranjit Rath.

The European Union must look to trade deals with countries like India to reduce dependencies, with higher US import tariffs pushing the bloc to diversity its ties, European Commission President Ursula von der Leyen said.

India's federal investigating agency said it has filed charge sheets in cases connected to "fraudulent" transactions between Anil Ambani's companies, Yes Bank and firms owned by the lender's former top boss.

Two significant renewable energy IPOs, Saatvik Green Energy IPO and GK Energy IPO, will open together from September 19th to September 23rd, 2025.