Daily Market Insight

~ Where the market left its footprints 21st August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,050.55	69.9	0.28	1.98	5.51
BSE Sensex	81,857.84	213.45	0.26	1.56	4.27
Bank Nifty	55,698.50	-166.65	-0.30	0.15	9.08
Nifty Midcap 100	57,930.50	265.85	0.46	2.28	0.83
Nifty Smallcap 100	17,968.40	54.1	0.30	1.70	-5.23
S&P 500	6,395.78	-15.59	-0.24	2.53	8.98
DJIA	44,938.31	16.04	0.04	3.10	6.01
Nasdaq 100	23,249.57	-135.2	-0.58	2.14	10.84
Nikkei 225	42,888.55	-657.74	-1.51	5.12	9.11
Hang Seng	25,165.94	43.04	0.17	2.69	28.25
Shanghai Com	3,766.21	38.92	1.04	5.79	15.44

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,050.55	55,698.50
Support	24,880 & 24,800	55,580 & 55,330
Resistance	25,140 & 25,240	55,970 & 56,170

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	12,604.01	13,238.27	-634.26
DII Cash Market	11,880.89	9,619.83	2,261.06

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Infosys	1496.20	3.90	10413.06
TCS	3098.60	2.73	4952.36
HUL	2669.80	2.50	3156.95
Nestle	1190.30	2.49	1652.53
NTPC	342.00	2.07	10824.54
Top Losers			
Bharat Elec	371.85	-2.16	20289.35
Bajaj Finance	887.80	-1.61	5561.65
Shriram Finance	616.30	-1.60	5710.61
Tata Motors	689.60	-1.52	10050.14
IndusInd Bank	778.20	-0.93	2332.16

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.81	1.55	-12.01
WTI (USD/bbl)	63.11	1.22	-13.70
Gold Spot (USD/t oz.)	3,345.29	0.89	25.86
USD/INR	87.08	-0.13	1.67
10 Year G-Sec India	6.497	-0.26	-4.19
US 10 Year Bond	4.287	-0.09	-6.18

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices surged for the fifth consecutive session on Wednesday, with tech firms rallying ahead of the Federal Reserve's Jackson Hole symposium and consumer equities rising on prospects of increased demand from proposed tax reforms. The GIFT Nifty was trading 0.03% or 8 points lower at 25,077.50 as of 6:40 a.m., which implied opening with a slight negative bias.

Global

The Nasdaq and S&P 500 fell as investors sold tech stocks and moved into less highly valued sectors, as they also awaited remarks from Federal Reserve officials at their Jackson Hole symposium this week.

Japan's Nikkei fell for the second straight day, retreating from record highs as chip-related stocks weighed on the index.

China's stocks climbed to their highest since 2015, driven by fund inflows into equities amid easing trade tensions and Beijing's measures against excessive competition.

Commodities & Currency :

The Indian rupee slipped, as corporate hedging and short-term speculators bolstered demand for the greenback, most of which was met by dollar sales by foreign banks.

Gold rose as the US dollar eased, while market participants braced for the minutes of the US central bank's last policy meeting and upcoming Jackson Hole symposium for clues on future interest rate moves.

News:

India's state-run refiners Indian Oil and Bharat Petroleum, have bought Russian oil for September and October delivery, resuming purchases after discounts widened two company officials aware of the matter said.

India's monetary policy committee members flagged evolving risks from global trade tensions and tariffs as a key drag on growth but said the economy remains resilient with the inflation outlook benign, minutes of the August meeting showed.

India's Tata Motors returned to South Africa's passenger vehicles market after a six-year absence, launching three ranges of SUVs and an entry-level compact hatchback to take on Chinese competitors.

India's Aurobindo Pharma is leading the race to buy Prague-based drugmaker Zentiva for up to $5.5 billion, the Economic Times reported, in what could be the largest-ever acquisition by an Indian pharmaceutical firm.

India's Infrastructure output grew 2% year-on-year in July, government data showed. The index, which tracks activity across eight sectors and makes up 40% of the country's industrial production, grew at a revised 2.2% in June, compared to the initial estimate of 1.7%.

India's Epsilon Advanced Materials is moving swiftly to close deals to supply critical components to Japanese and South Korean battery makers in the US, a top executive said, after Washington imposed anti-dumping duties on Chinese imports.