Daily Market Insight

~ Where the market left its footprints 21st October 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,843.15	133.3	0.52	4.05	8.85
BSE Sensex	84,363.37	411.18	0.49	4.17	7.46
Bank Nifty	58,033.20	319.85	0.55	4.85	13.66
Nifty Midcap 100	59,344.50	442.25	0.75	4.06	3.30
Nifty Smallcap 100	18,206.15	83.75	0.46	2.54	-3.97
S&P 500	6,735.13	71.12	1.07	0.36	14.77
DJIA	46,706.58	515.97	1.12	0.57	10.18
Nasdaq 100	25,141.02	323.07	1.30	1.37	19.86
Nikkei 225	49,185.50	1603.35	3.37	10.40	25.13
Hang Seng	25,858.83	611.73	2.42	-5.23	31.78
Shanghai Com	3,863.89	24.14	0.63	-1.78	18.43

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,843.15	58,033.20
Support	25,700 & 25,640	57,900 & 57,600
Resistance	26,000 & 26,130	58,300 & 58,500

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,786.33	10,995.88	790.45
DII Cash Market	15,690.37	13,204.91	2,485.46

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1639.10	3.90	3372.91
Reliance	1466.80	3.53	24721.98
Shriram Finance	693.95	2.73	6170.49
Bajaj Finserv	2139.80	2.69	1844.87
Axis Bank	1226.00	2.15	7418.62
Top Losers			
ICICI Bank	1390.30	-3.22	23330.23
JSW Steel	1145.20	-1.56	1214.43
M&M	3599.10	-1.32	2827.25
Eternal	338.15	-1.31	25481.98
Adani Ports	1467.00	-0.84	2660.48

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	60.95	-0.51	-19.69
WTI (USD/bbl)	57.52	-0.03	-21.35
Gold Spot (USD/t oz.)	4,348.76	2.28	63.62
USD/INR	87.93	0.05	2.66
10 Year G-Sec India	6.504	-0.14	-4.09
US 10 Year Bond	3.970	-0.24	-13.10

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian shares surged for the fourth straight session on Monday, 20th October, ahead of a two-day holiday, on better-than-expected earnings from banks and index heavyweight Reliance. The NSE Nifty 50 and BSE Sensex are expected to open positively in the special Muhurat trading session on Tuesday. The NSE Nifty 50 will find significant resistance at 26,000.

Global

US stocks jumped on Monday with finance and technology shares providing much of the upside muscle, as upbeat quarterly earnings results revived risk appetite and investors grew less fearful about regional bank credit quality.

Japan's Nikkei share gauge surged to a record high as fiscal expansionist Sanae Takaichi was set to become the country's next prime minister with a new political coalition in place.

Hong Kong stocks rallied, rebounding from Friday's steepest loss since April as US-China trade tensions showed signs of easing and China reported economic growth that was largely in line with expectations.

Commodities & Currency :

The Indian rupee lost most of its intraday gains but finished higher on Monday, with traders expecting the Reserve Bank of India to intervene through state-run banks to stabilize the currency near 88/dollar.

Gold prices rose by over 2% on Monday, buoyed by expectations of further US interest rate cuts and sustained safe-haven demand, as investors awaited upcoming US-China trade talks and inflation data out of the US this week.

News:

US President Donald Trump reiterated on Sunday that Indian Prime Minister Narendra Modi told him India will stop buying Russian oil, while warning that India would continue paying "massive" tariffs if it did not do so.

India's RBL Bank surged to a five-year high on Monday after Dubai-based Emirates NBD decided to purchase a $3 billion stake in the private lender, the largest cross-border acquisition in the country's financial sector.

The holding company of India's Godrej Consumer Products is set to tap the corporate bond market for the third time in as many months by the end of October, two merchant bankers said.

India's financial sector has seen a number of large deals in 2025, including two rare transactions involving foreign banks buying significant stakes in Indian lenders.

Indian e-commerce platform Meesho is looking to raise 42.5 billion rupees (about $484 million) in its initial public offering through a fresh issue, its updated prospectus showed, months after Reuters reported it confidentially filed draft papers.