AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 22nd August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,083.75	**33.2**	**0.13**	**2.11**	**5.65**
BSE Sensex	82,000.71	**142.87**	**0.17**	**1.74**	**4.45**
Bank Nifty	55,755.45	**56.95**	**0.10**	**0.25**	**9.19**
Nifty Midcap 100	57,708.95	**-221.55**	**-0.38**	**1.89**	**0.45**
Nifty Smallcap 100	17,966.35	**-2.05**	**-0.01**	**1.69**	**-5.24**
S&P 500	6,370.17	**-25.61**	**-0.40**	**2.12**	**8.55**
DJIA	44,785.50	**-152.81**	**-0.34**	**2.75**	**5.65**
Nasdaq 100	23,142.58	**-106.99**	**-0.46**	**1.67**	**10.33**
Nikkei 225	42,610.17	**-278.38**	**-0.65**	**4.44**	**8.40**
Hang Seng	25,104.61	**-61.33**	**-0.24**	**2.44**	**27.93**
Shanghai Com	3,771.10	**4.89**	**0.13**	**5.93**	**15.59**

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,083.75	55,755.45
Support	25,030 & 24,950	55,570 & 55,450
Resistance	25,180 & 25,240	55,970 & 56,170

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	14,960.14	13,713.63	**1,246.51**
DII Cash Market	14,514.86	11,968.59	**2,546.27**

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Cipla	1592.80	**3.02**	1698.28
Dr Reddys Labs	1276.60	**2.51**	2008.30
Bajaj Finserv	1980.00	**1.10**	2346.24
ICICI Bank	1446.00	**1.08**	6238.65
SBI Life Insurance	1877.30	**1.01**	1316.20
Top Losers			
Coal India	378.15	**-1.70**	6212.60
Bajaj Auto	8684.50	**-1.62**	510.56
TATA Cons. Prod	1088.10	**-1.56**	614.10
Power Grid Corp	284.00	**-1.53**	7389.27
Eternal	321.80	**-1.45**	22056.61

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.69	**1.27**	**-10.84**
WTI (USD/bbl)	63.56	**1.36**	**-13.09**
Gold Spot (USD/t oz.)	3,339.11	**-0.28**	**25.63**
USD/INR	87.26	**-0.21**	**1.88**
10 Year G-Sec India	6.528	**0.48**	**-3.74**
US 10 Year Bond	4.322	**-0.14**	**-5.41**

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's equity Indices rose for the sixth straight day, driven by financial stocks that rose in response to a plan to exclude insurance from taxation. The GIFT Nifty was trading 0.02% or 4 points lower at 25,090 as of 7:01 a.m., which implied a tepid start for the NSE Nifty 50 index.

Global

Wall Street's main indexes fell on Thursday as investors feared potentially hawkish remarks by the Federal Reserve chair on Friday that could spark volatility, while big-box retailer Walmart's quarterly results dampened sentiment.

Japan's Nikkei share average fell for a third session as investors sold stocks to book profits from a recent rally, with technology stocks tracking US peers lower.

China's benchmark Shanghai Composite Index ended Thursday at its highest level in a decade, lifted by a rally in fintech and digital asset-related shares after reports suggested Beijing may ease restrictions on stablecoins.

Commodities & Currency :

The Indian Rupee fell as aggressive dollar buying by oil importers towards the end of the session pressured the local currency even as persistent greenback sales by foreign banks helped offset some of the losses.

Gold prices edged lower as the dollar strengthened, while investors awaited US Federal Reserve Chair Jerome Powell's speech at the Jackson Hole symposium for signals on US policy direction.

News:

India and Russia agreed to boost trade ties as their foreign ministers met in Moscow, giving little indication that US President Donald Trump's hefty tariffs on India for buying Russian oil would disrupt their relations.

India private sector activity expanded at the fastest pace on record in August, fuelled by a robust surge in demand led by the dominant services sector, which allowed firms to hike prices at the fastest clip in over 12 years, a survey showed.

Indian tech firm Wipro said it would buy the digital transformation solutions unit of US-based audio products maker Harman for $375 million, aiming to bolster its AI-led engineering services across sectors.

Indian companies have seen the steepest earnings downgrades in Asia, with analysts slashing forecasts as steep US tariffs heighten risks to growth even if proposed domestic tax cuts help cushion the impact.

India's federal government has not quantified the loss to the exchequer due to a lowering of the goods and services tax rates but a state ministers' panel has endorsed the new rate structure, state ministers said.

Clean Science and Technology fell 2.76% after a trading error triggered extraordinary volumes, sparking investor jitters. The company later clarified to the exchanges that the chaos stemmed from a sell-side mistake by a domestic broker.