Daily Market Insight

~ Where the market left its footprints 22nd September 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,327.05	-96.55	-0.38	2.85	6.67
BSE Sensex	82,626.23	-387.73	-0.47	2.81	5.25
Bank Nifty	55,458.85	-268.6	-0.48	2.70	8.61
Nifty Midcap 100	59,094.35	21.15	0.04	3.99	2.86
Nifty Smallcap 100	18,504.55	27.6	0.15	5.75	-2.40
S&P 500	6,664.36	32.4	0.49	3.88	13.56
DJIA	46,315.27	172.85	0.37	2.25	9.25
Nasdaq 100	24,626.25	171.36	0.70	6.01	17.40
Nikkei 225	45,045.81	-257.62	-0.57	6.77	14.60
Hang Seng	26,545.10	0.25	0.00	3.62	35.27
Shanghai Com	3,820.09	-11.57	-0.30	-1.43	17.09

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25.327.05	55,458.85
Support	25,260 & 25,170	55,180 & 55,000
Resistance	25,450 & 25,540	55,660 & 55,870

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	37,090.98	36,700.24	390.74
DII Cash Market	14,840.35	12,735.13	2,105.22

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Adani Enterprise	2524.00	5.08	7965.14
IndusInd Bank	744.40	1.22	8190.28
Bharti Airtel	1962.40	1.10	11287.60
SBI Life Insura	1841.70	1.09	1633.21
Adani Ports	1427.80	1.06	8069.17
Top Losers			
HCL Tech	1467.40	-1.77	3197.96
M&M	3592.10	-1.38	4018.34
ICICI Bank	1402.20	-1.37	13457.34
Titan Company	3467.20	-1.26	2337.26
Trent	5080.00	-1.24	1105.19

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	66.68	-1.13	-12.18
WTI (USD/bbl)	62.68	-1.40	-14.29
Gold Spot (USD/t oz.)	3,685.30	1.13	38.65
USD/INR	88.10	0.04	2.86
10 Year G-Sec India	6.488	-0.40	-4.32
US 10 Year Bond	4.127	0.56	-9.66

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices dipped on Friday, 18th September as financials and IT sectors were profit-booked, snapping a three-session winning streak fuelled by optimism about probable Federal Reserve rate cuts and progress in trade talks between India and the US. The GIFT Nifty was up 0.05% or 14 points at 25,369.50 as of 6:31 a.m. This suggested a slow start for the NSE Nifty 50 index.

Global

All three of Wall Street's main indexes closed at record highs for the second day in a row, with trading volume reaching its highest level since April, as FedEx climbed after optimistic earnings.

Japan's stock market closed lower, with the Nikkei 225 down 0.57% and the Topix down 0.35%, after the Bank of Japan maintained its policy rate at 0.5% and announced the commencement of ETF and JREIT sales. Core inflation slowed to 2.7% in August.

Chinese markets closed down, with the Shanghai Composite down 0.3% and the Shenzhen Component down 0.04%, as profit-taking following a ten-year high and the PBOC's decision to hold rates dampened confidence in the absence of new catalysts.

Commodities & Currency :

The Indian rupee closed little changed on Friday, capping a week of volatile market action that saw the currency reach a more than two-week high before falling to near all-time lows as the dollar and US bond yields surged despite a rate decrease.

Gold prices rose on Friday, heading for a sixth straight weekly gain, with the market looking for further indications after the US Federal Reserve announced its first rate cut of the year.

News:

According to two sources familiar with the situation, India's central bank is anticipated to recommend preserving an existing inflation target for the third time in a row after receiving feedback from stakeholders who supported the framework.

Adani Group stocks closed higher, a day after India's markets regulator dismissed parts of short-seller Hindenburg Research's stock manipulation charges against billionaire Gautam Adani and his conglomerate, perhaps putting an end to the group's regulatory woes.

Madhya Pradesh, a central Indian state, has obtained India's lowest-ever price for purchasing solar electricity backed by battery storage in a clean energy auction, according to a top state official, in a deal that might redefine how states buy power.

Urban Company, India's largest home-services provider, will increase its focus on providing services within an hour in order to attract more customers accustomed to receiving rapid deliveries of everything from groceries to gadgets.

The price of Russia's Urals crude oil for delivery to top buyer India is rising despite growing sanctions risks as Ukrainian attacks on Russian ports and pipelines and tightened sanctions prompt concerns about supply.