# Daily Market Insight

*~ Where the market left its footprints* 23rd July 2025

| Indices | Closing Level | Change Value | Change (%) | Performance MTD (%) | Performance YTD (%) |
|---|---|---|---|---|---|
| Global | | | | | |
| Nifty 50 | 25,060.90 | -29.8 | -0.12 | -1.88 | 5.55 |
| BSE Sensex | 82,186.81 | -13.53 | -0.02 | -1.80 | 4.69 |
| Bank Nifty | 56,756.00 | -196.75 | -0.35 | -1.22 | 11.15 |
| Nifty Midcap 100 | 59,103.40 | -364.95 | -0.61 | -1.08 | 2.88 |
| Nifty Smallcap 100 | 18,893.35 | -64.95 | -0.34 | -0.85 | -0.35 |
| S&P 500 | 6,309.62 | 4.02 | 0.06 | 1.80 | 7.52 |
| DJIA | 44,502.44 | 179.37 | 0.40 | 0.02 | 4.98 |
| Nasdaq 100 | 23,063.58 | -116.48 | -0.50 | 2.60 | 9.95 |
| Nikkei 225 | 39,774.92 | -44.19 | -0.11 | -0.53 | 1.19 |
| Hang Seng | 25,130.03 | 135.89 | 0.54 | 3.75 | 28.06 |
| Shanghai Com | 3,581.86 | 22.07 | 0.62 | 3.59 | 9.79 |

*Source: Bloomberg*

| Levels | Nifty 50 | Bank Nifty |
|---|---|---|
| Closing | 25,060.90 | 56,756.00 |
| Support | 24,870 & 24,730 | 56,250 & 55,980 |
| Resistance | 25,260 & 25,180 | 57,400 & 57,200 |

| FII DII Activity | Gross Purchase | Gross Sale | Net Purchase/Sale |
|---|---|---|---|
| FII Cash Market | 12,804.14 | 16,353.06 | -3,548.92 |
| DII Cash Market | 16,673.37 | 11,433.60 | 5,239.77 |

*Source: Bloomberg*

| Trading Activity | Close Price | 1D (%) change | Volume ('000) |
|---|---|---|---|
| **Top Gainers** | | | |
| Eternal | 299.80 | 10.34 | 269332.77 |
| HDFC Life | 763.30 | 1.46 | 4334.53 |
| Titan Company | 3472.40 | 1.15 | 1752.28 |
| Hindalco | 690.05 | 1.08 | 3802.27 |
| Bharat Elec | 403.10 | 0.79 | 12447.43 |
| **Top Losers** | | | |
| Shriram Finance | 640.15 | -2.36 | 4671.42 |
| Eicher Motors | 5439.50 | -2.13 | 517.94 |
| Adani Ports | 1420.70 | -2.05 | 976.67 |
| Tata Motors | 673.40 | -2.04 | 7749.52 |
| Jio Financial | 310.80 | -2.03 | 15797.95 |

*Source: Bloomberg*

| Commodity, Currency & Debt | LTD | 1D (%) change | YTD (%) |
|---|---|---|---|
| Brent (USD/bbl) | 68.65 | -0.81 | -9.59 |
| WTI (USD/bbl) | 66.55 | -0.42 | -8.49 |
| Gold Spot (USD/t oz.) | 3,429.21 | 0.95 | 28.30 |
| USD/INR | 86.37 | -0.08 | 0.84 |
| 10 Year G-Sec India | 6.307 | 0.11 | -7.00 |
| US 10 Year Bond | 4.362 | 0.41 | -4.53 |

*Source: Bloomberg*

## MARKET COMMENTARY

**Equity :**

**India**

India's share indices closed slightly changed on Tuesday, with a post-earnings rally in Zomato parent Eternal offset by a decline in Reliance Industries and uncertainty about a trade agreement with the United States. The GIFT Nifty was trading 0.10% or 26 points higher at 25,165 as of 6:54 a.m., indicating a positive start for the NSE Nifty 50 index.

**Global**

The S&P 500 closed at a new high on Tuesday, despite severe losses in General Motors and a gain in Tesla, as investors concentrated on recent and forthcoming quarterly reports and looked for indications of progress in US trade talks.

Japan's Nikkei share average climbed, as investors returning from an extended holiday weekend reacted positively to the outcome of the upper house election, which aligned with market expectations.

China stocks closed at an eight-month high on Tuesday, while Hong Kong shares extended gains to a multi-year peak, driven by construction and power firms after work began on a major dam project in Tibet, billed as the world's largest.

**Commodities & Currency :**

The Indian rupee strengthened slightly, and dollar-rupee forward premiums rose as concerns about the economic impact of US President Donald Trump's trade war drove down US Treasury rates, the greenback, and crude oil prices.

Gold rose to a five-week high, boosted by trade uncertainty and lower US bond yields as investors remain focused on US President Donald Trump's August 1 tariff deadline.

**News:**

Paytm, an Indian fintech firm, has turned a profit for the first time since September 2024, thanks to strong loan growth and rigorous cost management, and it expects profitability to expand further.

United Breweries, India's largest beer maker, reported a roughly 6% increase in quarterly profit, boosted by decreased excise tax expenses and robust demand for its premium beers.

Foreign appetite for Indian government bonds has returned, with inflows steadily increasing over the last month as investors gauge new expectations of a rate cut by the Reserve Bank of India as early as August.

India's Zee Entertainment Enterprises reported a 14% reduction in first-quarter revenue, citing low advertising spending by firms.

Colgate Palmolive India reported a fall in first-quarter profit, citing low urban demand and increased competition in its core oral care sector.

Eternal's stock rose 10.56% after its quick commerce operation, Blinkit, outperformed the food delivery market in terms of sales in the first quarter of FY26. Eternal's rapid commerce sector (Blinkit) revenue in the first quarter was Rs 2,400 crore (+155% YoY), outpacing the food ordering and delivery segment sales of Rs 2,261 crore (+16.43%).