

# **Daily Market Insight**

~ Where the market left its footprints

23rd July 2025

ndices Closing Change		ge	Performance	
Level	Value	(%)	MTD (%)	YTD (%)
25,060.90	-29.8	-0.12	-1.88	5.55
82,186.81	-13.53	-0.02	-1.80	4.69
56,756.00	-196.75	-0.35	-1.22	11.15
59,103.40	-364.95	-0.61	-1.08	2.88
18,893.35	-64.95	-0.34	-0.85	-0.35
6,309.62	4.02	0.06	1.80	7.52
44,502.44	179.37	0.40	0.02	4.98
23,063.58	-116.48	-0.50	2.60	9.95
39,774.92	-44.19	-0.11	-0.53	1.19
25,130.03	135.89	0.54	3.75	28.06
3,581.86	22.07	0.62	3.59	9.79
	25,060.90 82,186.81 56,756.00 59,103.40 18,893.35 6,309.62 44,502.44 23,063.58 39,774.92 25,130.03	25,060.90 -29.8 82,186.81 -13.53 56,756.00 -196.75 59,103.40 -364.95  18,893.35 -64.95  6,309.62 4.02 44,502.44 179.37 23,063.58 -116.48 39,774.92 -44.19 25,130.03 135.89	Level         Value         (%)           25,060.90         -29.8         -0.12           82,186.81         -13.53         -0.02           56,756.00         -196.75         -0.35           59,103.40         -364.95         -0.61           18,893.35         -64.95         -0.34           6,309.62         4.02         0.06           44,502.44         179.37         0.40           23,063.58         -116.48         -0.50           39,774.92         -44.19         -0.11           25,130.03         135.89         0.54	Level         Value         (%)         MTD (%)           25,060.90         -29.8         -0.12         -1.88           82,186.81         -13.53         -0.02         -1.80           56,756.00         -196.75         -0.35         -1.22           59,103.40         -364.95         -0.61         -1.08           18,893.35         -64.95         -0.34         -0.85           6,309.62         4.02         0.06         1.80           44,502.44         179.37         0.40         0.02           23,063.58         -116.48         -0.50         2.60           39,774.92         -44.19         -0.11         -0.53           25,130.03         135.89         0.54         3.75

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: Bloomhera			·

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			

Jource: Dicomber

#### MARKET COMMENTARY

#### Equity:

#### India

India's share indices closed slightly changed on Tuesday, with a postearnings 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%).

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