AJCONGLOBAL
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Daily Market Insight

~ Where the market left its footprints

24th October 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,891.40	22.8	0.09	4.25	9.05
BSE Sensex	84,556.40	130.06	0.15	4.41	7.70
Bank Nifty	58,078.05	70.85	0.12	4.93	13.74
Nifty Midcap 100	59,371.25	-38.30	-0.06	4.11	3.34
Nifty Smallcap 100	18,291.45	-9.2	-0.05	3.02	-3.53
S&P 500	6,738.44	39.04	0.58	0.41	14.82
DJIA	46,734.61	144.2	0.31	0.63	10.24
Nasdaq 100	25,097.42	218.41	0.88	1.20	19.65
Nikkei 225	48,641.61	-666.18	-1.35	9.18	23.75
Hang Seng	25,967.98	186.21	0.72	-4.83	32.33
Shanghai Com	3,922.41	8.65	0.22	-0.29	20.22

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,891.40	58,078.05
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	20,477.78	21,643.72	-1,165.94
DII Cash Market	19,247.94	15,354.21	3,893.73

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Infosys	1528.50	3.81	20358.62
HCL tech	1523.90	2.55	5011.47
TCS	3073.20	2.21	5564.76
Shriram Finance	709.65	2.07	8911.04
Axis Bank	1258.80	1.74	14611.22
Top Losers			
Eternal	328.35	-2.88	54284.16
Indigo	5789.00	-2.10	577.93
Eicher Motors	6884.50	-1.91	419.75
Bharti Airtel	2007.90	-1.74	8790.13
UltraTech Cement	12145.00	-1.60	370.81

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	65.91	5.30	-13.20
WTI (USD/bbl)	61.73	5.52	-15.59
Gold Spot (USD/t oz.)	4,138.90	0.99	55.72
USD/INR	87.85	0.09	2.57
10 Year G-Sec India	6.536	0.49	-3.62
US 10 Year Bond	3.997	-0.10	-12.52

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

The Indian stock market closed largely unchanged on Thursday, giving up some of its early gains. The Sensex ended at 84,556.40, up 130.06 points, while the Nifty finished at 25,891.40, rising 22.80 points. Early Friday, the GIFT Nifty was up near 26,000 points. The benchmark Nifty 50 futures contract increased 0.11% to 26,040.5 as of 7:01 a.m. today, indicating a stronger start for Indian markets.

Global

Wall Street advanced on Thursday as investors mulled a mixed batch of corporate earnings and shifting geopolitical concerns. All three major US stock indexes closed higher, with tech strength nudging the Nasdaq into the lead. But the small-cap Russell 2000 was the clear outperformer.

The Nikkei 225 dropped 1.35% to 48,641, and the Topix fell 0.39% to 3,254, retreating from record highs. US stocks fell on potential software export restrictions to China, though Trump later confirmed his meeting with Xi is "scheduled."

The Shanghai Composite climbed 0.22% to close at 3,922, while the Shenzhen Component also rose 0.22% to 13,025 on Thursday, recovering from earlier losses as hopes grew for new stimulus measures from Beijing to boost consumption and mitigate trade risks.

Commodities & Currency :

The Indian Rupee strengthened on Thursday, driven by optimism over a potential US-India trade deal, despite concerns about rising crude oil prices.

Gold prices rose on Thursday after two consecutive sessions of losses, as renewed geopolitical risks bolstered safe-haven demand and investors braced for key US inflation data due on Friday.

News:

Ratings agency S&P Global on Thursday downgraded its outlook of India's Tata Motors Passenger Vehicles to 'negative', citing a "slow recovery" of the automaker's key Jaguar Land Rover (JLR) unit, which was hit by a cyberattack early last month.

India's defence acquisition council cleared proposals worth 790 billion rupees ($9 billion) to buy new missile systems, high mobility vehicles, naval surface guns and other equipment for its armed forces, the government said.

Colgate-Palmolive's Indian unit reported a decline in second quarter profit on Thursday, due to a temporary disruption to sales after the government announced sweeping cuts to goods and services taxes.

Hindustan Unilever reported a nearly 5% decline in profit before tax and exceptional items for the second quarter, as sales volumes took a hit before the government's goods and services tax cuts kicked in.

Indian refiners are poised to sharply curtail imports of Russian oil to comply with new US sanctions on two top Russian producers, industry sources said on Thursday, potentially removing a major hurdle to a trade deal with the United States.