Daily Market Insight

~ Where the market left its footprints 25th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,870.10	-213.65	-0.85	1.24	4.75
BSE Sensex	81,306.85	-693.86	-0.85	0.88	3.57
Bank Nifty	55,149.40	-606.05	-1.09	-0.84	8.01
Nifty Midcap 100	57,629.75	-79.20	-0.14	1.75	0.31
Nifty Smallcap 100	17,919.50	-46.85	-0.26	1.42	-5.49
S&P 500	6,466.91	96.74	1.52	3.67	10.20
DJIA	45,631.74	846.24	1.89	4.69	7.64
Nasdaq 100	23,498.12	355.54	1.54	3.23	12.03
Nikkei 225	42,633.29	23.12	0.05	4.49	8.46
Hang Seng	25,339.14	234.53	0.93	3.39	29.13
Shanghai Com	3,825.76	54.66	1.45	7.47	17.26

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,840.10	55,149.40
Support	24,800 & 24,700	54,960 & 54,800
Resistance	24,970 & 25,050	55,470 & 55,630

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,179.18	11,801.70	-1,622.52
DII Cash Market	10,106.92	10,436.17	-329.25

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
M&M	3403.00	0.83	2509.87
Maruti Suzuki	14349.00	0.48	458.94
Bharti Airtel	1933.30	0.18	3271.92
Bharat Elec.	374.85	0.17	15246.73
Titan	3621.00	0.13	691.84
Top Losers			
Asian Paints	2504.50	-2.42	523.77
Grasim	2813.80	-2.34	671.90
Adani Ent.	2324.90	-2.20	584.21
UltraTech Cement	12589.00	-2.18	226.95
Hero MotoCorp	4997.90	-1.95	1357.46

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.73	0.09	-10.80
WTI (USD/bbl)	63.66	0.22	-12.95
Gold Spot (USD/t oz.)	3,371.86	0.99	26.86
USD/INR	87.53	-0.30	2.19
10 Year G-Sec India	6.551	0.35	-3.40
US 10 Year Bond	4.254	-1.71	1.54

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Sensex and Nifty ended lower on Friday, snapping a six-day rally, as caution prevailed ahead of Fed Chair Powell's speech and new US tariffs on Indian goods. Profit-taking, FII selling, and weak technical momentum added to the pressure, with investors awaiting clarity on US rate cuts.

Global

Wall Street's main indices finished higher, with the blue-chip Dow setting a new closing high, as investors poured into stocks after US Federal Reserve Chair Jerome Powell hinted at a near-term interest rate decrease during his Jackson Hole Symposium speech.

Japanese shares rose, with higher bond yields buoying banks and insurers and a weaker yen lifting automakers, while investors globally awaited Federal Reserve Chair Jerome Powell's speech later in the day for hints on the path for US policy.

China's Shanghai Composite index rose 1.45% to 3,825.76 after a JPMorgan report indicated that the rally in onshore Chinese equities is likely to persist.

Commodities & Currency :

The Indian rupee extended losses, weighed down by a stronger dollar and caution ahead of Fed Chair Jerome Powell's speech, ending a volatile week marked by pressure from US tariff-related uncertainties.

Gold prices rebounded, buoyed by heightened expectations of a September rate cut following comments from Federal Reserve Chair Jerome Powell at the central bank's Jackson Hole symposium.

News:

India's renewable energy developers should align expansion plans with realistic demand forecasts to prevent infrastructure investments from turning unviable, a power ministry advisor said.

China has stepped up urea exports to India, easing concerns for farmers during the kharif season. Strong monsoon rains and higher crop acreage have boosted India's urea demand, while talks with China also cover rare earth magnets and other key supplies.

Nvidia has suspended production of its China-focused H20 AI chip, asking suppliers Amkor and Samsung to halt work after Chinese regulators raised security concerns. The company stressed the chip is not for military or government use.

Apollo Hospitals' MD and major shareholder Suneeta Reddy sold a 1.3% stake via a block deal, offloading 1.9 million shares at ₹7,850 each for ₹14.89 billion ($170 million). The sale price was about 1% below Thursday's close.

Bajaj Auto's supply of rare earth magnets has improved, MD Rajiv Bajaj told CNBC-TV18, enabling the automaker to ramp up electric vehicle production ahead of the festive season.

According to sources, a SEBI panel has suggested limiting an entity's intraday net exposure in equity index derivatives to ₹15 billion (around $172 million).

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