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Daily Market Insight

~ Where the market left its footprints 25th September 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	25,056.90	-112.6	-0.45	1.75	5.53
BSE Sensex	81,715.63	-386.47	-0.47	1.68	4.09
Bank Nifty	55,121.50	-388.25	-0.70	2.07	7.95
Nifty Midcap 100	57,924.45	-572.15	-0.98	1.93	0.82
Nifty Smallcap 100	18,069.55	-122.2	-0.67	3.27	-4.70
S&P 500	6,637.97	-18.95	-0.28	3.47	13.11
DJIA	46,121.28	-171.5	-0.37	1.82	8.80
Nasdaq 100	24,503.57	-76.6	-0.31	5.48	16.82
Nikkei 225	45,630.31	136.65	0.30	8.16	16.09
Hang Seng	26,518.65	359.53	1.37	3.52	35.14
Shanghai Com	3,853.64	31.81	0.83	-0.56	18.12

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	25,056.90	55,121.50
Support	24,970 & 25,880	54,880 & 54,550
Resistance	25,150 & 25,260	55,670 & 55,850

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	11,089.16	13,514.91	-2,425.75
DII Cash Market	12,632.38	11,420.70	1,211.68

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
PowerGrid Corp	293.30	1.63	14032.39
NTPC	347.60	1.34	14653.58
HUL	2549.50	1.08	1882.88
Tata Cons. Prod.	1140.10	1.03	1100.75
JSW Steel	16249.00	0.94	663.65
Top Losers			
Tata Motors	682.95	-2.62	13252.22
BEL	395.45	-2.23	10835.67
Adani Enterprise	2619.80	-2.11	1720.79
Wipro	244.59	-2.02	7888.80
IndusInd Bank	740.75	-1.92	2993.98

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.23	2.37	-8.82
WTI (USD/bbl)	64.93	2.40	-11.21
Gold Spot (USD/t oz.)	3,722.24	-1.11	40.04
USD/INR	88.70	0.06	3.56
10 Year G-Sec India	6.491	0.28	-4.28
US 10 Year Bond	4.141	-0.14	-9.37

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Wednesday, 24th September, India's equity markets fell for the fourth straight session, their longest losing streak since mid-July, as fears about the impact of US visa restrictions persisted. The GIFT Nifty was trading 0.05% or 12 points higher at 25,075 as of 8:05 a.m.

Global

US stocks closed lower for a second straight session, as investors booked profits with indexes near record levels after Federal Reserve Chair Jerome Powell flagged potentially stretched stock prices.

Japan's Nikkei share average closed at a record high, fighting back from early losses on optimism buoyed by investments in artificial intelligence.

Hong Kong stocks rose, ending a two-day decline, after Chinese tech giant Alibaba announced plans to scale up investment in AI infrastructure and got a vote of confidence from a prominent US investor, sparking a rally in the wider Chinese tech sector.

Commodities & Currency :

The Indian rupee stayed near its record low on Wednesday, remaining unchanged, as concerns over the impact of heavy US tariffs and changes in visa restrictions continued pressure on the currency, with the Reserve Bank of India intervening to provide some relief.

Gold prices fell on Wednesday as the US dollar strengthened, retreating from a record high set the previous day, as investors waited for economic data due later this week for more clues on the Federal Reserve's policy direction.

News:

India will require more government oversight as the country's airlines take delivery of thousands of planes and its fast-growing market is creating openings for new players, the government's aviation safety chief told Reuters.

India's goods and services tax reforms should help lower retail prices and support consumption growth, the Reserve Bank of India said in its monthly bulletin released late.

India's Export-Import (EXIM) Bank is increasing credit support to exporters and helping them diversify into newer markets, particularly Africa, following punitive US tariffs on imports from the South Asian nation, a top official said.

Indian drugmakers Dr Reddy's Laboratories and Hetero Labs said on Wednesday that they will sell generic versions of a new and highly effective HIV prevention drug for roughly $40 per year beginning in 2027.

The Reserve Bank of India (RBI) sold a net of $2.54 billion in the spot foreign exchange market in July, data released on Monday as part of the central bank's monthly bulletin showed.

Walmart-backed Indian fintech firm PhonePe, the country's most used payment application, has filed for an initial public offering, the company's spokesperson said.