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Daily Market Insight

~ Where the market left its footprints 26th September 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,890.85	-166.05	-0.66	1.08	4.83
BSE Sensex	81,159.68	-555.95	-0.68	0.99	3.38
Bank Nifty	54,976.20	-145.3	-0.26	1.80	7.67
Nifty Midcap 100	57,555.90	-368.55	-0.64	1.29	0.18
Nifty Smallcap 100	17,966.80	-102.75	-0.57	2.68	-5.24
S&P 500	6,604.72	-33.25	-0.50	2.95	12.54
DJIA	45,947.32	-173.96	-0.38	1.44	8.39
Nasdaq 100	24,397.31	-106.26	-0.43	5.02	16.31
Nikkei 225	45,754.93	124.62	0.27	8.45	16.40
Hang Seng	26,484.68	-33.97	-0.13	3.39	34.97
Shanghai Com	3,853.30	-0.34	-0.01	-0.57	18.11

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,890.85	54,976.20
Support	24,830 & 24,750	54,570 & 54,550
Resistance	25,060 & 25,150	55,530 & 55,250

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	15,079.55	20,074.97	-4,995.42
DII Cash Market	15,515.70	10,412.69	5,103.01

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Bharat Elec	403.15	1.95	23804.02
Hero Motocorp	5354.50	1.47	640.47
Axis Bank	1166.60	0.66	11188.30
Hindalco	745.65	0.62	4702.51
ONGC	239.67	0.48	10150.65
Top Losers			
Trent	4742.50	-3.15	1518.47
Power Grid Corp	284.40	-3.03	16242.84
Tata Motors	664.30	-2.73	24687.61
TCS	2957.40	-2.57	4974.36
Asian Paints	2404.00	-2.17	1518.22

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.43	0.17	-8.38
WTI (USD/bbl)	64.98	-0.02	-11.14
Gold Spot (USD/t oz.)	3,756.40	0.54	41.33
USD/INR	88.67	0.03	3.53
10 Year G-Sec India	6.497	0.09	-4.19
US 10 Year Bond	4.176	0.14	-8.61

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

India's market indices fell for the fifth straight session on Thursday, 25th September, the longest losing streak in more than six months, as IT companies fell following ongoing foreign outflows in the aftermath of US visa restrictions kept investors on edge. The GIFT Nifty was trading 0.11% or 29 points higher at 24,956, signalling a slightly better start for the NSE Nifty 50 index.

Global

US stocks ended lower, with most S&P 500 sectors down as economic data increased uncertainty about the Federal Reserve's outlook for interest rate cuts.

Japanese markets ended modestly higher after minutes from the Bank of Japan's July meeting signalled that policymakers remain inclined to resume interest rate hikes in the future if economic and price conditions develop as expected.

Hong Kong stocks fell slightly after rising earlier in the day, as investors took profits from a tech-led rally on Wednesday.

Commodities & Currency :

The Indian rupee traded in a narrow range and closed nearly flat, with likely central bank intervention staving off the pressure from weak equities and foreign outflows

Gold lost previous gains on Thursday after weekly unemployment claims in the United States unexpectedly fell, while investors anticipated key inflation data that might influence the Federal Reserve's next interest rate action.

News:

The Reserve Bank of India will keep its key interest rate at 5.50% on October 1 and for the rest of the year, according to a Reuters poll of economists, as the central bank gauges the impact of past rate cuts on the economy.

India signed a deal worth 623.70 billion rupees ($7.03 billion) on Thursday to buy indigenous fighter aircraft from state warplane maker Hindustan Aeronautics Ltd (HAL) (HIAE.NS), opens new tab in the effort to modernise its armed forces.

A joint venture between Bharti Enterprises and private equity firm Warburg Pincus is looking to raise 40 billion rupees ($451 million) through the sale of bonds in the next quarter, three sources aware of the matter said.

India's central bank announced final rules for authentication procedures in digital payment transactions, with the goal of improving security and fostering innovation in fraud prevention.

India's government has drafted a proposal to ease foreign investment rules to allow e-commerce companies like Amazon to buy products directly from Indian sellers and then sell them to overseas customers, a document showed.