AJCONGLOBAL
YOUR FRIENDLY FINANCIAL ADVISORS

Daily Market Insight

~ Where the market left its footprints 28th August 2025

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,712.05	-255.70	-1.02	0.60	4.08
BSE Sensex	80,786.54	-849.37	-1.04	0.23	2.90
Bank Nifty	54,450.45	-688.85	-1.25	-2.10	6.64
Nifty Midcap 100	56,766.20	-935.30	-1.62	0.23	-1.19
Nifty Smallcap 100	17,548.60	-362.95	-2.03	-0.68	-7.44
S&P 500	6,481.40	15.46	0.24	3.90	10.44
DJIA	45,565.23	147.16	0.32	4.53	7.48
Nasdaq 100	23,565.85	40.56	0.17	3.53	12.35
Nikkei 225	42,520.27	125.87	0.30	4.22	8.17
Hang Seng	25,201.76	-323.16	-1.27	2.83	28.43
Shanghai Com	3,800.35	-68.03	-1.76	6.75	16.48

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,712.05	54,450.45
Support	24,630 & 24,520	54,130 & 53,900
Resistance	24,790 & 24,870	54,700 & 54,960

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	44,146.80	50,663.29	-6,516.49
DII Cash Market	22,000.77	14,940.40	7,060.37

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Eicher Motors	6151.00	2.68	1474.81
HUL	2692.60	2.32	4348.65
Maruti Suzuki	14714.00	1.81	962.97
ITC	403.35	1.00	13715.75
Nestle	1162.20	0.80	3619.89
Top Losers			
Shriram Finance	594.70	-4.21	18048.59
Sun Pharma	1600.30	-3.40	4502.37
Tata Steel	155.03	-2.88	19621.10
Bajaj Finance	876.25	-2.73	6712.93
Trent	5295.00	-2.36	949.92

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.16	0.61	-10.92
WTI (USD/bbl)	63.60	0.52	-12.84
Gold Spot (USD/t oz.)	3,387.33	-0.30	27.44
USD/INR	87.68	-0.11	2.37
10 Year G-Sec India	6.600	0.05	-2.68
US 10 Year Bond	4.227	-0.18	-7.45

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Indian benchmark indices closed sharply lower on Tuesday as heavy selling, triggered by U.S. tariff concerns, dragged the Sensex down over 800 points and the Nifty below 25,000. Gift Nifty was hovering near 24,649 (at 7.00 am), about 82 points lower than the previous close of Nifty futures, signaling a weak start for Indian equity indices.

Global

The S&P 500 closed at a record high on Wednesday, supported by strong investor optimism and anticipation ahead of Nvidia's much-awaited quarterly earnings, a key event for Wall Street this week.

Japanese shares ended mixed on Wednesday, with the Nikkei 225 up 0.3% and Topix slightly lower as investors awaited Nvidia's earnings amid U.S. Fed uncertainty and upcoming domestic economic data.

Chinese stocks retreated sharply on Wednesday, as profit-taking followed August's rally and sentiment weakened after Trump threatened a 200% tariff on China if it restricts rare earth magnet exports. Persistent domestic demand concerns also weighed after data showed a 1.7% drop in industrial profits for the first seven months of 2025.

Commodities & Currency:

The rupee fell past 87.8 per dollar on Wednesday, its fifth consecutive decline, as the implementation of 50% U.S. tariffs on $48 billion worth of Indian exports hit sentiment, with persistent dollar demand and trade-related pressures outweighing likely RBI intervention.

Gold eased to around $3,387 per ounce on Thursday, pulling back from a two-week high as traders awaited U.S. PCE price index data, though prices stayed near record levels amid political uncertainty, rising Fed rate-cut bets, and strong Asian demand.

News:

U.S. President Donald Trump's doubling of tariffs on Indian imports to as much as 50% has come into effect, striking a severe blow to small exporters and jobs escalating trade tensions and undercutting the U.S.–India strategic relationship even as India pledges exporter support.

India is showing strong support for the Quad group ahead of Modi's Japan visit, focusing on critical minerals and balancing China, even as U.S. ties are tense.

Prime Minister Modi formally launched Maruti Suzuki's first Made-in-India electric SUV, the e-Vitara, at Hansalpur, Gujarat—now set for export to more than 100 countries—alongside the start of hybrid battery-electrode production, marking a significant stride in India's green mobility ambitions.

Indian auto and electronics dealers are limiting festive season inventory to protect working capital, awaiting potential GST rate cuts, while consumers delay purchases anticipating price drops.