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Daily Market Insight

~ Where the market left its footprints 29th September 2025, 8:50am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,654.70	-236.15	-0.95	0.12	3.84
BSE Sensex	80,426.46	-733.22	-0.90	0.08	2.44
Bank Nifty	54,389.35	-586.85	-1.07	0.72	6.52
Nifty Midcap 100	56,378.55	-1177.35	-2.05	-0.79	-1.87
Nifty Smallcap 100	17,560.90	-405.9	-2.26	0.36	-7.38
S&P 500	6,643.70	38.98	0.59	2.95	12.54
DJIA	46,247.29	299.97	0.65	1.44	8.39
Nasdaq 100	24,503.85	106.54	0.44	5.02	16.31
Nikkei 225	45,354.99	-399.94	-0.87	7.50	15.39
Hang Seng	26,128.20	-356.48	-1.35	1.99	33.15
Shanghai Com	3,828.11	-25.20	-0.65	-1.22	17.33

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,654.70	54,389.35
Support	24,520 & 24,400	54,060 & 53,770
Resistance	25,750 & 25,840	54,,570 & 54,880

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	10,751.34	16,438.92	-5,687.58
DII Cash Market	17,766.67	11,923.46	5,843.21

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
L & T	3729.50	2.34	5870.30
Tata Motors	672.90	1.29	15780.43
ITC	405.10	1.25	14414.04
Eicher Motors	7047.00	0.87	679.36
Reliance	1377.60	0.38	9879.11
Top Losers			
IndusInd Bank	3396.50	-3.78	3046.76
M&M	712.75	-3.78	5779.49
Eternal	321.00	-3.39	26840.54
Tata Steel	167.40	-2.89	20157.66
Bajaj Finance	985.10	-2.73	9109.74

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	69.52	-0.03	-8.60
WTI (USD/bbl)	65.03	0.08	-11.08
Gold Spot (USD/t oz.)	3,750.69	0.03	41.11
USD/INR	88.72	-0.05	3.58
10 Year G-Sec India	6.523	0.40	-3.81
US 10 Year Bond	4.187	0.31	-8.95

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

Domestic equity indices fell on Friday, 26th September, snapping a three-session winning streak fuelled by optimism over probable US Federal Reserve rate reduction and progress in trade discussions between India and the United States. The GIFT Nifty was trading 0.17% or 43 points higher at 24,814.50 as of 7:39 a.m.

Global

US stocks ended higher on Friday after mostly in-line US inflation data, but the three major indexes posted losses for the week.

Japan stocks were lower after the closed, as losses in the Paper & Pulp, Transport and Communication sectors led shares lower.

Hong Kong stocks capped the first weekly decline this month as concerns about frothy valuations of global equities unsettled investors and drug makers slid after the Trump administration unveiled a fresh bout of tariffs on the industry.

Commodities & Currency :

The Indian rupee fell to an all-time low and has remained under pressure this week, weighed down by concerns about how US tariffs and immigration policy changes could affect trade, remittance, and foreign portfolio flows to India.

Gold gained on Friday after US inflation data came in line with expectations, reinforcing bets that the Federal Reserve may continue with interest rate cuts later this year.

News:

India has suggested lowering severe fuel economy criteria for small cars, according to a draft of the new rules made public late on Thursday, driving shares of small carmaker Maruti Suzuki to a record high.

According to industry analyst Dorab Mistry, India's edible oil imports in 2025/26 are expected to jump 4.6% to a record 17.1 million metric tons, owing to increased palm oil purchases by the world's largest vegetable oil customer.

Russia-backed Indian refiner Nayara Energy is exporting oil products through sanctioned tankers and tapping new markets this month as it revives overseas sales in the aftermath of crippling sanctions, LSEG and Kpler shipping data shows.

Hindustan Unilever said that recent GST cuts on consumer products caused a temporary disruption in sales as distributors and retailers worked to clear existing inventory at old prices.

Shares of India's Waaree Energies fell 4.5% to 3,288.9 rupees on Friday after US customs officials said they were investigating if the solar panels maker sidestepped tariffs on Chinese-made cells and panels by labeling them as made in India.

US trade negotiators have told their Indian counterparts that curbing purchases of Russian oil is crucial to reducing India's tariff rate and sealing a trade deal, two people familiar with the talks told Reuters.