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Daily Market Insight

~ Where the market left its footprints 30th September 2025, 8:25am

Indices	Closing Level	Change Value	Change (%)	Performance MTD (%)	Performance YTD (%)
Global					
Nifty 50	24,634.90	-19.8	-0.08	0.04	3.76
BSE Sensex	80,364.94	-61.52	-0.08	0.00	2.37
Bank Nifty	54,461.00	71.65	0.13	0.85	6.66
Nifty Midcap 100	56,533.15	154.60	0.27	-0.51	-1.60
Nifty Smallcap 100	17,548.65	-12.25	-0.07	0.29	-7.44
S&P 500	6,661.21	17.51	0.26	3.83	13.51
DJIA	46,316.07	68.78	0.15	2.25	9.26
Nasdaq 100	24,611.35	107.5	0.44	5.94	17.33
Nikkei 225	45,043.75	-311.24	-0.69	6.77	14.59
Hang Seng	26,622.88	494.68	1.89	3.92	35.67
Shanghai Com	3,862.53	34.43	0.90	-0.34	18.39

Source: Bloomberg

Levels	Nifty 50	Bank Nifty
Closing	24,634.90	54,461.00
Support	24,520 & 24,400	54,060 & 53,770
Resistance	24,900 & 24,830	54,,700 & 54,900

FII DII Activity	Gross Purchase	Gross Sale	Net Purchase/Sale
FII Cash Market	17,421.42	20,253.01	-2,831.59
DII Cash Market	40,256.98	36,411.11	3,845.87

Source: Bloomberg

Trading Activity	Close Price	1D (%) change	Volume ('000)
Top Gainers			
Interglobe Avi	5707.00	2.63	13795.99
Titan Company	3401.20	2.22	1452.64
Wipro	239.64	1.65	8894.41
SBI	870.75	1.61	22641.71
Hindalco	753.80	1.34	4347.16
Top Losers			
Axis Bank	1132.20	-1.89	9693.88
Maruti Suzuki	15984.00	-1.85	627.33
Dr Reddys Labs	1234.60	-1.48	3899.16
Adani Enterprise	2509.50	-1.34	1012.40
L & T	3688.40	-1.10	2599.63

Source: Bloomberg

Commodity, Currency & Debt	LTD	1D (%) change	YTD (%)
Brent (USD/bbl)	67.74	-3.18	-10.58
WTI (USD/bbl)	63.41	-3.51	-13.29
Gold Spot (USD/t oz.)	3,826.52	1.77	43.97
USD/INR	88.76	-0.05	3.63
10 Year G-Sec India	6.555	0.49	-3.34
US 10 Year Bond	4.141	0.05	-9.37

Source: Bloomberg

MARKET COMMENTARY

Equity :

India

On Monday, 29th September, India's market indices extended their losing skid, with weakness in heavyweight private banks outweighing advances in energy equities. The GIFT Nifty was trading at 25,000 early Tuesday.

Global

Wall Street indexes closed up with the Nasdaq leading gains as investors bought heavyweight technology stocks and shrugged off the uncertainty of a potential US government shutdown and hawkish remarks from Federal Reserve officials.

Japan's Nikkei fell for the second day in a row, retreating from record-high levels hit last week as multiple firms lost dividend entitlements.

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 closed near its all-time low, with persisting foreign portfolio outflows and corporate dollar demand putting pressure on the South Asian currency.

Gold prices surged past $3,800 an ounce for the first time on Monday, setting a new record as investors flocked to the safe-haven asset on US rate cut expectations, fears of a potential government shutdown and escalating geopolitical tensions.

News:

India's industrial output grew 4% year-on-year in August on the back of increased mining activity, government data showed.

Moody's Ratings confirmed India's long-term local and foreign-currency sovereign ratings and maintained its "stable" outlook, noting ongoing economic momentum and solid domestic finance for its budget deficit.

Indian consumer giant Hindustan Unilever pared most losses after falling as much as 2.7% as investors sought comfort from an expected recovery in demand after a consumption tax reform-led hit to sales.

The Reserve Bank of India is widely expected to hold its key policy rate at 5.50%, though some economists say a surprise cut cannot be ruled out as it weighs the impact of US trade tariffs and subdued inflation.

Tata Steel has signed a non-binding pact with the government of Netherlands to transition to low-carbon emission steel production at its IJmuiden plant, the Indian steelmaker said.

The Indian government has appointed Shirish Chandra Murmu as a deputy governor of the Reserve Bank of India, according to a government notice.

Tata Capital's record-breaking Rs 15,511 crore IPO, the largest from the Tata group and any NBFC, opens on October 6. Valuing the company between Rs 1.31 lakh crore and Rs 1.38 lakh crore, the issue offers shares at Rs 310-326 each.