

Weekly Market insights & Strategies



27 October 2025

Weekly Market Recap: India & Global

Last week India saw the start of Samvat 2082. Indian Equity markets were bullish throughout. They registered gains in the early sessions, before booking mild profits by the end of the week. The benchmark Indices, Nifty 50 and Sensex reached all-time highs during the week. This rally was supported by robust corporate earnings and positive global signals. The rally went down on Friday, with traders booking profits due to new geopolitical and trade related uncertainties. Nifty ended this week marginally lower at 25795.15, Sensex at 84211.88 ending the six-session winning streak. On Monday, Nifty was up by 0.52% and Nifty Bank reaching a record high of 58000. These gains were led by Reliance Industries, which elevated by 4% due to strong Q2 results and HDFC Bank and ICICI Bank were also the major contributors. FIIs injected Rs.790 Crores, indicating improvements in their sentiments towards Indian market. Wednesday, Sensex rose up by 130 points to 84,556 and Nifty up by 23 points to 25,891. The surprise was the IT sector which led the rally, as the IT major Infosys was up 4% as its promoters opted out of the Rs.18000cr buyback. TCS and HCL-Tech were both 2.21% and 2.55% due to optimism on India-US deal on reducing the tariff barriers.

The reduction in tariffs brought relief to textile and seafood exporters, while Oil & Gas stocks declined following new US sanctions on Russian oil companies. Markets ended their six-day winning streak on Friday, with the Nifty closing 0.37% lower at 25,795.15, partly due to cautious remarks from India’s Commerce Minister on US trade talks. Banking stocks, led by PSU banks like SBI and Canara Bank, dominated early in the week, while IT stocks led midweek gains. Ostwal Group firms posted over 50% growth, HUL remained flat, and Dr. Reddy’s reported moderate profit gains. Coforge impressed with an 86% surge in profits, whereas Supreme Petrochem underperformed. Among small caps, Moschip Technologies showed steady growth. Globally, equities rallied — Dow Jones (+2.20%), S&P 500 (+1.92%), Nasdaq (+2.31%), Nikkei 225 (+3.61%), Hang Seng (+3.62%), and KOSPI (+5.14%) all ended the week higher.

Indian Equity Market Performance & Key Valuation Ratio

Index	24-10-2025	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	25795.15	0.33%	22.67	3.53	1.3
BSE Sensex	84211.88	0.31%	23.14	4.49	1.15
BSE Midcap	46594.96	0.50%	33.27	4.92	0.76
BSE Smallcap	53516.8	0.89%	34.44	3.71	0.61
BSE 250 LargeMidCap	11068.73	0.30%	24.33	4.39	1.13
Sectoral Indices					
BSE Fmcg	20669.88	-0.41%	39.95	8.65	1.77
BSE Commodity	7936.68	0.11%	27.56	3.23	1.04
BSE CD	10086.66	-0.42%	46.8	7.4	0.63
BSE Energy	11752.99	1.21%	12.37	1.96	2.75
BSE Financial Services	13016.04	0.13%	18.45	3.06	0.89
BSE Healthcare	44883.76	-0.05%	41.18	6.74	0.53
BSE IT	35260.84	3.07%	26.68	7.38	2.38
BSE Auto	60409.27	-0.36%	29.63	7.01	1.07
BSE Bankex	65090.04	0.05%	16.27	2.78	0.79
BSE Metal	34290.99	1.45%	19.98	2.94	1.71
BSE Oil & Gas	27575.04	0.90%	11.56	1.66	2.49
BSE Power	6829.33	-0.32%	28.39	3.99	1.34
BSE Realty	7309.67	0.79%	48.33	6.02	0.33

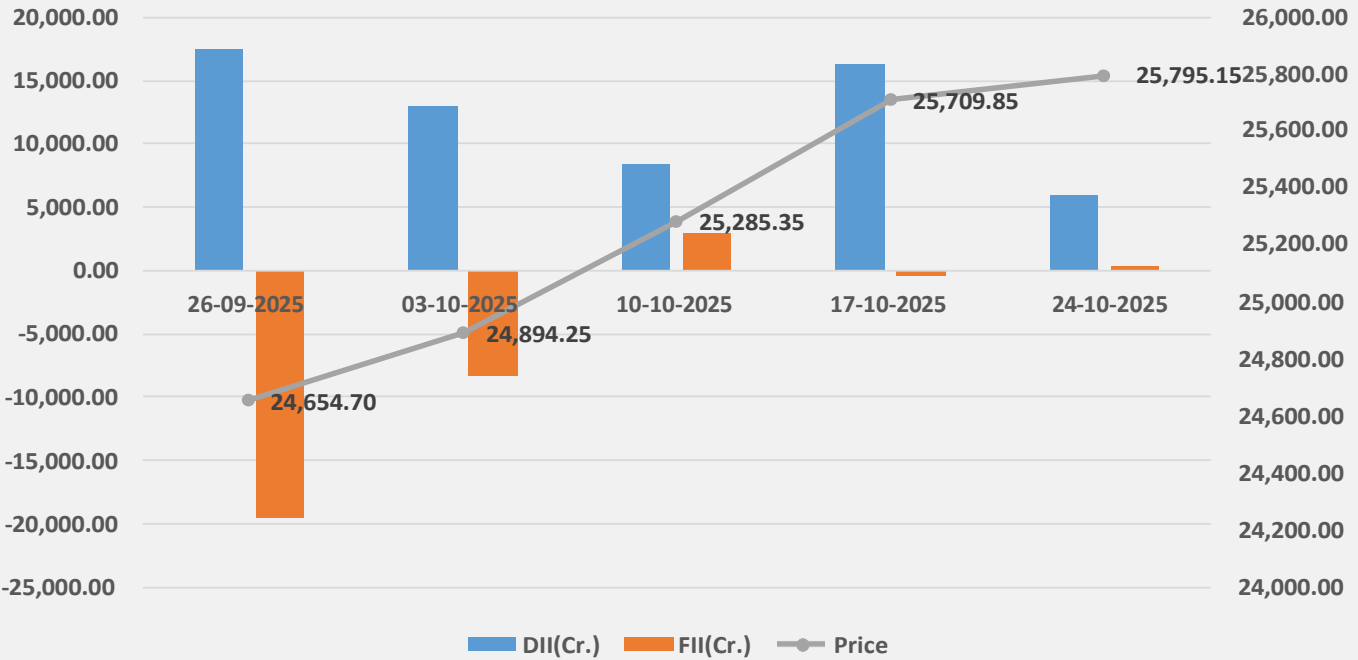
Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Infosys Ltd.	1525.4	5.90	5.30
Bajaj Finserv Ltd.	2159.5	3.60	7.80
Axis Bank Ltd	1241.9	3.50	7.60
Tata Consultancy Service	3063.2	3.40	5.70
HCL Technologies Ltd.	1523.8	2.50	9.20

Losers

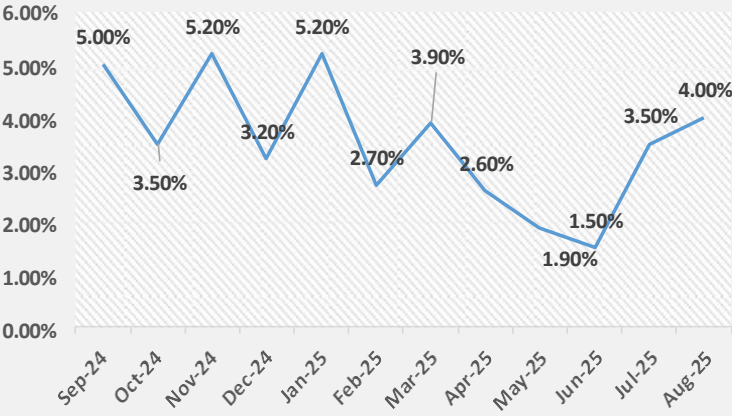
Symbol	LTP	%Change (WoW)	%Change (MoM)
Eternal Ltd.	326.6	-4.70	1.70
ICICI Bank Ltd.	1377.7	-4.10	1.30
UltraTech Cement Ltd.	11918	-3.70	-1.30
Adani Ports & Special Economic Zone	1429	-3.40	2.70
Hindustan Unilever Lever	2516.4	-3.40	0.20

FII & DII Investment Flow Vs NIFTY50



Macro-Economic Performance: India

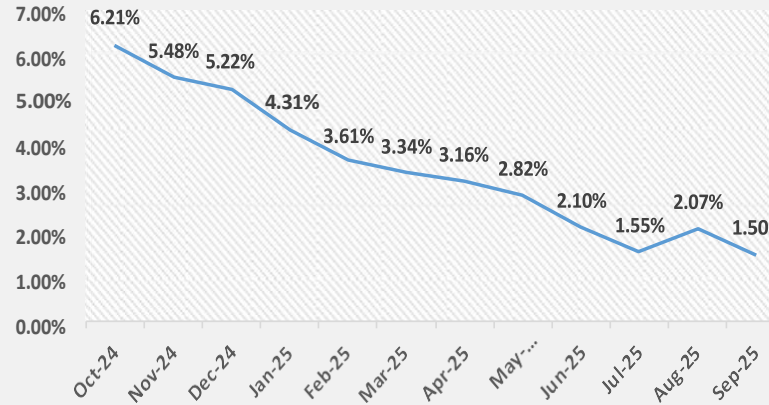
IIP (YoY)



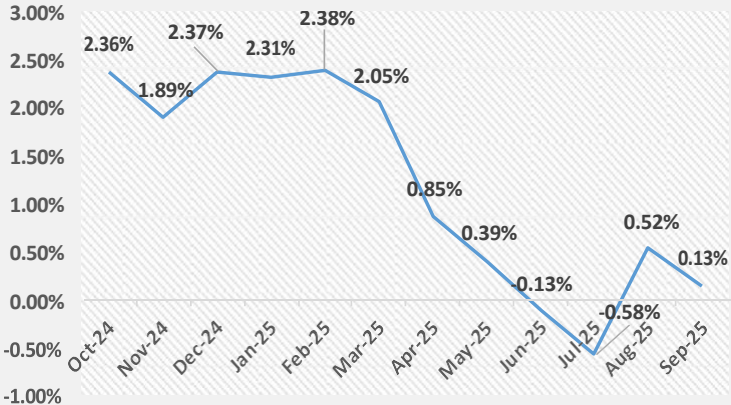
Infrastrucuture Output (YoY)



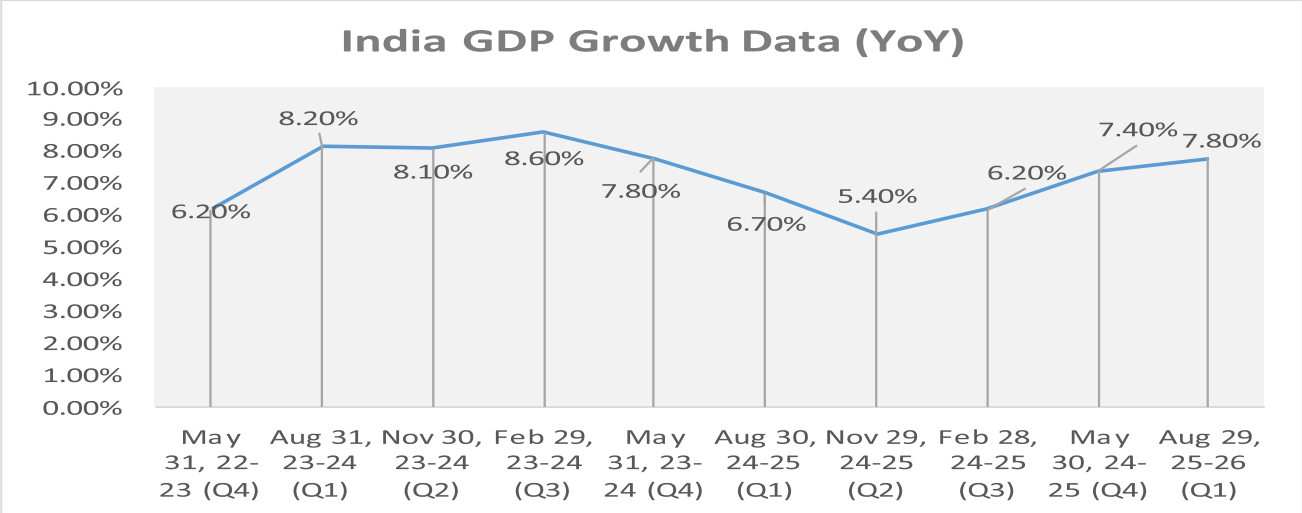
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



NIFTY (25795.15): India’s GDP to rise by 6.6% according to IMF World Economic Outlook Report and will outpace China’s growth of 4.8% in 2025-26, followed by Spain with 2.9%, USA 1.9%, Japan 1.1% and Canada 1.2%. GOI is aiming for Rs.10000 Cr missile deal with Russia to boost S-400 air defense systems. Google, Amazon, Reliance are in race to invest \$50Bn plus in India’s data center capacity to scale up to 9GW by 2030. SEBI has barred MF schemes from participating in pre-IPO placements of equity shares. Blackstone to invest ₹6,200 crores for 9.99% stake in Federal Bank. Fresh guidelines were issued by US over \$100000 H-1B Visa bringing relief to IT workers. Oil prices extended gains after settlement on Wednesday, rising by more than \$2 a barrel after the United States imposed sanctions on major Russian oil companies Rosneft and Lukoil and Asian stock market opened high due to Donald Trump and Xi Jinping talks. Canada PM, Mark Carney has revealed plans for a new immigration framework attracting global talent.

The Nifty continued its bullish trajectory through most of the week, maintaining strong upward momentum. The index consistently traded above its key exponential moving averages (EMAs), signaling that the overall trend remains firmly positive and within an upward channel. Momentum indicators also supported this bullish view — the 14-day Relative Strength Index (RSI) stayed above the 70 mark for the majority of the week, reflecting sustained buying strength. However, the RSI’s overbought position suggests that the market may experience a short-term pause or minor consolidation before resuming its uptrend. The Moving Average Convergence Divergence (MACD) indicator also remained in positive territory, reinforcing the ongoing bullish momentum. That said, the MACD histogram value has slightly eased from 86.01 to 73.67, hinting at a marginal cooling in bullish intensity in the near term. On the technical front, immediate support is seen in the 25,750–25,700 zone, while resistance is expected around the 26,100–26,300 levels. A breakout above this range could open the door for further gains, whereas a dip below support may trigger short-term profit booking.

Next week, beginning from 27th October 2025, the US will release Durable Goods Orders data. Tuesday brings India’s Industrial and Manufacturing Production figures. Wednesday sees Japan’s Consumer Confidence and the US EIA Crude Oil Data and Fed Interest Rate Decision. On Thursday, Japan announces Foreign Bond Investment and BoJ Interest Rate Decision, while the US releases GDP Growth Rate and Jobless Claims. The week ends on heavy data flows with, India reporting Budget Value, Loan & Deposit Growth, and FX Reserves, Japan releases Unemployment Rate, Core CPI, Industrial Output, and PMI data and the US posting its Core PCE Price Index, Personal Income, and Spending data

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