

Weekly Market insights & Strategies



13 October 2025

Weekly Market Recap: India & Global

On Monday, the Indian stock market ended sharply higher with positive momentum throughout the day, led by strong buying in IT and banking stocks. Last week, investors watched key stock market triggers, including the developments over US government shutdown, US FOMC meeting minutes, updates in the Israel-Hamas war, Q2 results, IPO activity, gold prices, trends in flow of foreign funds, and other key domestic and global macroeconomic data. -0The S&P 500 and the Nasdaq advanced at the start of the week, as artificial intelligence-related deal making boosted investor sentiment even as the U.S. government shutdown extended through its sixth day. Asian markets traded higher on the first day of the week, with Japanese markets hitting record highs after the country’s ruling Liberal Democratic Party elected fiscal dove Sanae Takaichi as its new leader and become the next prime minister. Indian benchmark indices advanced on October 10, marking their second consecutive session of gains amid broad-based buying, except in the metal and IT sectors. The Sensex climbed over 328 points (0.4 percent) to close at 82,500.82, while the Nifty 50 rose by more than 103 points (0.41 percent) to settle at 25,285.35. Both the indices ended the week by almost 2%. PM Narendra Modi

spoke with US President Donald Trump to review trade progress, raising hopes of a trade truce. Meanwhile, US Treasury Secretary Scott Bessent said India will likely buy less Russian oil and more from the US. Minutes from the Fed’s latest meeting showed most policymakers favoured additional rate cuts this year, citing rising risks to employment and easing concerns over inflation. US stock market is witnessing consolidation starting with the third-quarter earnings season witnessing some negative movement. During the week The Dow Jones Industrial Average saw a low of around 46,280, while the S&P 500 declined 6,700. The Nasdaq Composite fell towards 22,720. Asian markets traded mostly lower on Friday, tracking overnight losses on Wall Street. Japan’s Nikkei 225 declined 0.60% while the Topix declined 0.92%. South Korea’s Kospi rallied 1.88%, while the Kosdaq fell 0.37%. Hong Kong’s Hang Seng Index saw slight weakness.

Indian Equity Market Performance & Key Valuation Ratio

Index	10-10-2025	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	25285.35	1.55%	22.36	3.46	1.31
BSE Sensex	82500.82	1.57%	22.82	4.4	1.16
BSE Midcap	46362.29	1.48%	33.46	4.9	0.76
BSE Smallcap	53378.57	0.01%	34.31	3.7	0.6
BSE 250 LargeMidCap	10898.4	1.37%	24.07	4.33	1.14
Sectoral Indices					
BSE Fmcg	20231.32	-0.34%	39.01	8.47	1.8
BSE Commodity	7956.99	0.07%	28.04	3.24	1.04
BSE CD	10007.57	0.46%	46.83	7.35	0.64
BSE Energy	11559.89	0.73%	12.27	1.93	2.8
BSE Financial Services	12748.7	1.51%	18.05	3	0.9
BSE Healthcare	44688.17	2.61%	41.05	6.71	0.53
BSE IT	34985.28	4.11%	26.82	7.33	2.3
BSE Auto	59626.26	-0.14%	29.25	6.92	1.08
BSE Bankex	63872.58	1.77%	15.7	2.72	0.8
BSE Metal	33990.56	-0.17%	20.1	2.92	1.72
BSE Oil & Gas	27363	0.98%	11.51	1.65	2.51
BSE Power	6796.13	-0.18%	28.23	3.97	1.35
BSE Realty	6965.31	2.24%	48.11	5.74	0.33

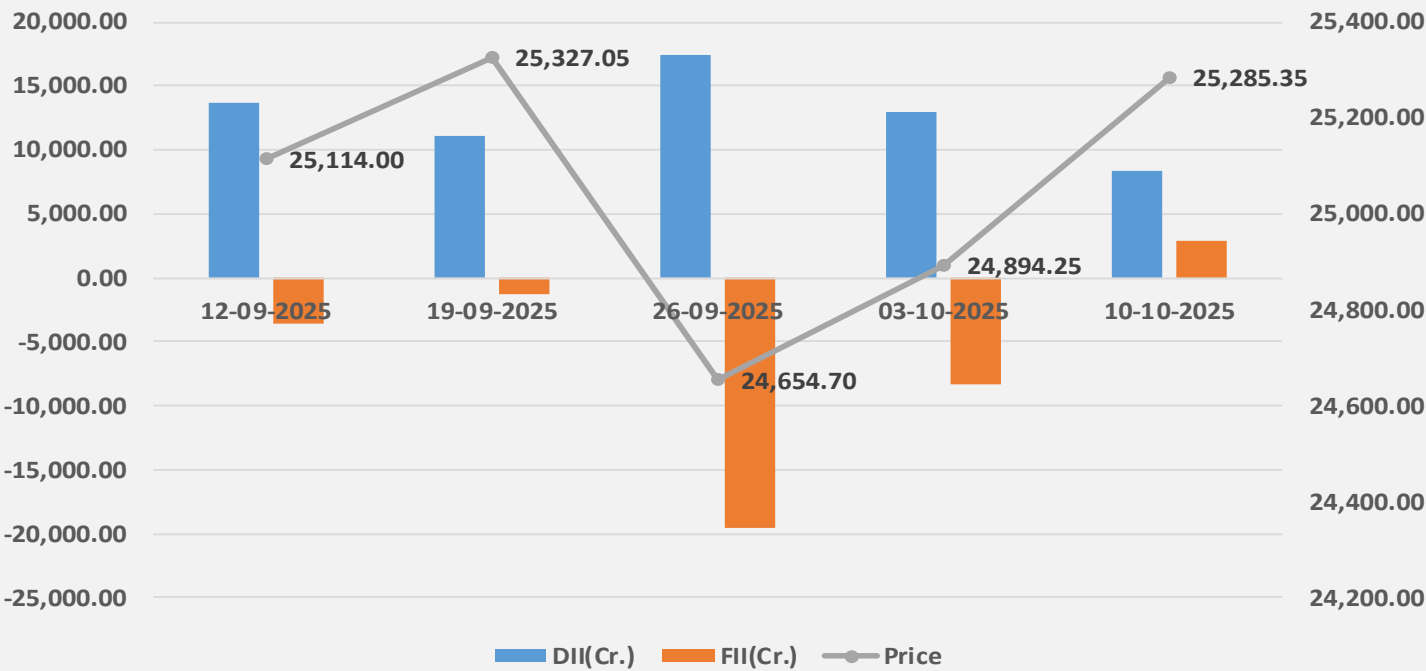
Top Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
HCL Technologies Ltd.	1495.5	7.63	4.79
Eternal Ltd.	348.3	5.87	6.94
Infosys Ltd.	1514.9	4.78	0.70
Kotak Mahindra Bank Ltd.	2150.1	4.21	9.68
Tata Consultancy Services Ltd.	3028.3	3.92	-0.69

Top Losers

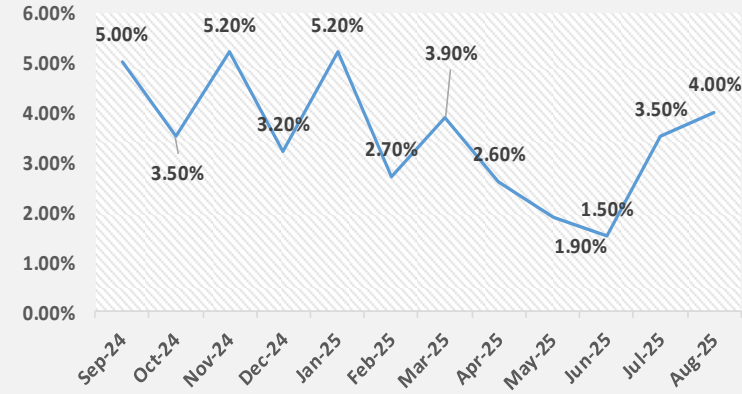
Symbol	LTP	%Change (WoW)	%Change (MoM)
Tata Motors Ltd.	678.95	-5.48	-5.11
Trent Ltd.	4691.1	-2.92	-10.11
Adani Ports & Special Economic Zone Ltd.	1409.4	-0.93	2.06
ITC Ltd.	402.8	-0.69	-1.77
Hindustan Unilever Ltd.	2528.9	-0.29	-4.28

FII & DII Investment Flow Vs NIFTY50

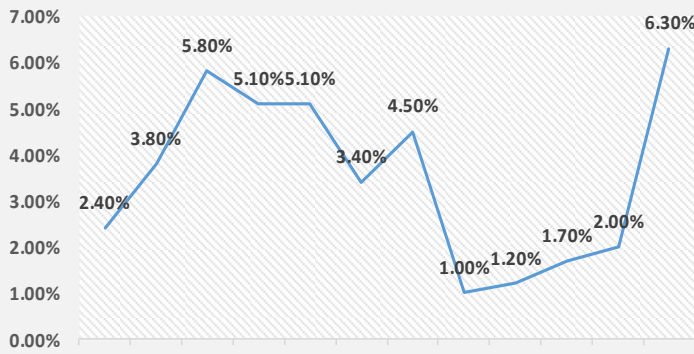


Macro-Economic Performance: India

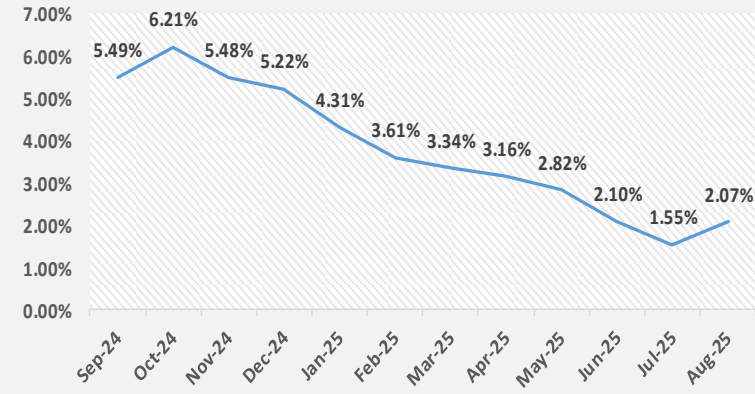
IIP (YoY)



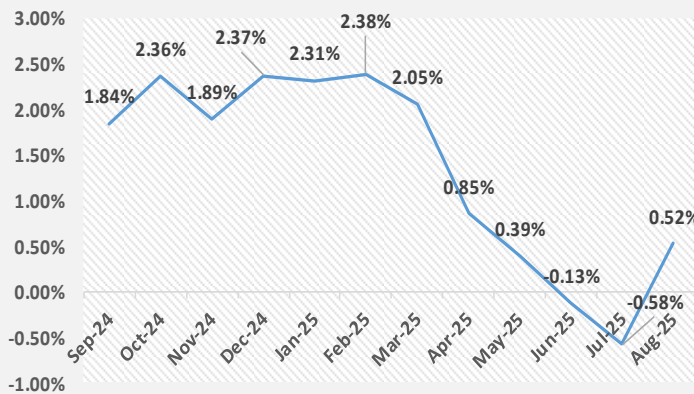
Infrastrucutre Output (YoY)



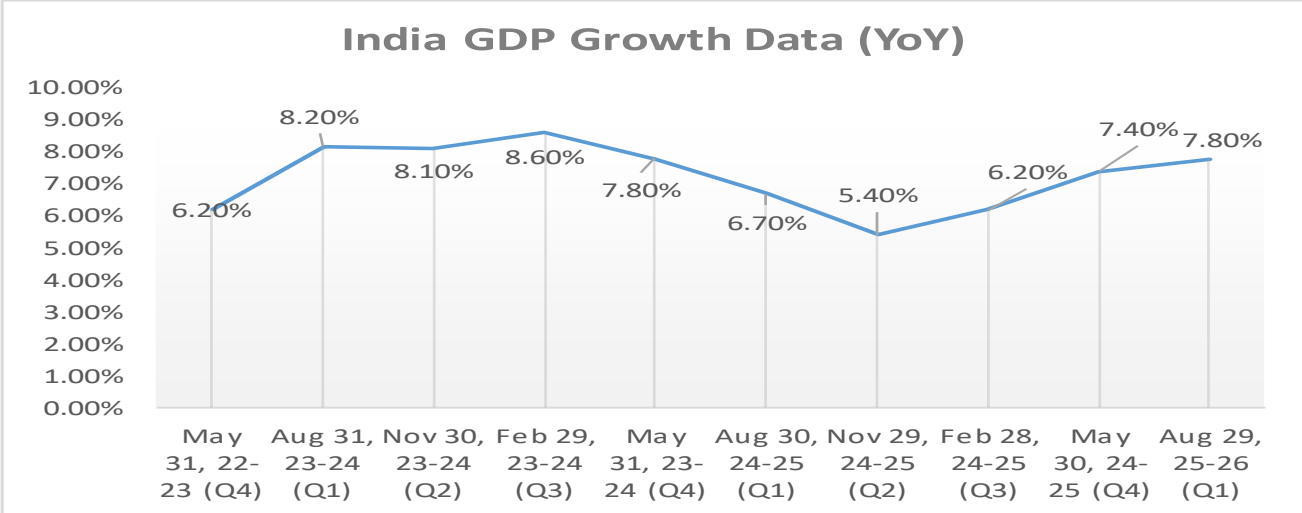
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



NIFTY (25,285.35): Commerce and Industry Minister Piyush Goyal said India and the US are continuing talks on the proposed bilateral trade agreement, aiming to meet the November 2025 deadline. Japan’s real wages dropped 1.4% year-on-year in August, marking the eighth consecutive monthly decline and highlighting continued pressure on household purchasing power. Minutes from the Fed’s latest meeting showed most policymakers favoured additional rate cuts this year, citing rising risks to employment and easing concerns over inflation. China tightened its rare earth export controls on Thursday, broadening restrictions on processing technology and overseas collaborations, and signalling plans to curb exports to foreign defence and semiconductor industries. Israeli Prime Minister Benjamin Netanyahu hailed Thursday as a “great day for Israel” after sealing a US-brokered deal with Hamas to end the Gaza war and secure the release of hostages. US initial jobless claims rose to a seasonally adjusted 235,000 for the week ending October 4, up from 224,000 a week earlier. Meanwhile, a large-scale Russian attack early Friday sparked a fire in a high-rise apartment building in central Kyiv and struck several energy facilities. In Japan, wholesale prices increased 2.7% year-on-year in September, unchanged from August’s pace.

Indian benchmark indices extended their positive momentum last week, forming higher highs on the technical charts and reinforcing the ongoing bullish trend. From a technical perspective, the indices are trading comfortably above their 100-day and 200-day exponential moving averages, confirming the strength of the medium-term uptrend. For the Nifty 50, a decisive move above 25,390 will be crucial to sustain upward momentum, potentially paving the way toward 25,443 and 25,614, with an extended target near 25,786. On the downside, initial support is placed at 24,941, followed by 24,888 and 24,716, while a strong support base near 24,545 is expected to limit deeper declines. In the Bank Nifty, price action suggests consolidation with a bullish bias. A sustained move above 56,882–57,004 could confirm a breakout, opening room for a rally towards 57,398 and 57,793. Conversely, a drop below 55,849–55,727 may trigger profit-taking or fresh selling pressure, with key supports at 55,332 and 54,938. Overall, both Nifty and Bank Nifty maintain a constructive outlook, and any short-term dips are likely to provide buying opportunities within the broader uptrend.

Global markets are heading into a data-heavy week, with a series of key economic indicators expected to guide investor sentiment. In India, attention will be on the release of inflation figures, unemployment rate, trade balance, passenger vehicle sales, and foreign exchange reserves all of which will offer insights into domestic demand, price stability. Japan is scheduled to release its industrial production data, which will provide cues on the health of its manufacturing sector. From China, investors will watch trade balance, vehicle sales, and inflation numbers to gauge the strength of its economic recovery and consumption trends. In the U.S., a flurry of releases including inflation and core inflation rates, producer price inflation, weekly jobless claims, industrial and manufacturing output will help shape expectations for future Federal Reserve policy moves. Meanwhile, the U.K. will unveil key macroeconomic readings such as the unemployment rate, GDP growth, goods trade balance, and industrial and manufacturing production.

StockHolding Services Limited

(Formerly known as SHCIL Services Limited)

CIN NO: U65990MH1995GOI085602 SEBI - RA: INH000001121

Plot No. P-51, T.T.C. Industrial Area, MIDC Mahape, Navi Mumbai – 400 710

Call to us: 91-080-69850100

E-Mail: customerdesk@stockholdingservices.com

www.stockholdingservices.com

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S. Devarajan

MBA (Finance & Foreign Trade), Ph.D. (Financial Management)
Head of Research & Quant Strategist

Chrisanto Silveria

MBA (Finance)
Research Analyst

Sourabh Mishra

MMS (Finance)
Research Analyst