

Weekly Market insights & Strategies



20 October 2025

Weekly Market Recap: India & Global

Indian market witnessed a mixed but overall positive week, with momentum building in the latter half. The Nifty 50 and Sensex started the week on a weak note as global uncertainties resurfaced, but later rallied strongly to close at fresh 52-week highs. On Monday, the Nifty declined 0.23% to 25,227 and the Sensex fell 0.21% to 82,327, ending their two-day winning streak. Selling pressure continued on Tuesday, due to concerns over weak quarterly earnings, subdued inflation data, and renewed U.S.–China trade tensions. However, sentiment turned positive from Wednesday onward, supported by falling crude oil prices, encouraging global cues, and renewed foreign investor interest. The uptrend strengthened further on Thursday as the Nifty gained 1.03% to close at 25,585 and the Sensex advanced 862 points to 83,467, driven by strong corporate earnings and optimism over India–U.S. trade discussions. The week ended strong, with the Nifty closing at 25,709 and the Sensex at 83,952, both marking new 52-week highs. Banking and financials led the gains, with SBI, Canara Bank leading and Bajaj Finance, Bajaj FinServ in Financials.

The IPO market remained strong with Rubicon Research made debut with 28% premium, Canara Robeco AMC listed 5.36% higher and Canara HSBC Life Insurance saw a healthy listing. Low Inflation data helped ease concerns about further rate hike. Indian IT companies Infosys, Wipro, and LTI-Mindtree beat revenue estimates, as clients fund AI projects. This follows Tata Consultancy Services’ strong results, indicating recovery in the \$283 billion IT sector. Gold and Silver hit record highs on the MCX due to safe-haven demand ahead of Diwali. Crude Oil prices dropped to four-month lows, improving market sentiment for energy-dependent sectors. In this week, US’s Dow Jones was up by 1.56%, S&P 500 up by 1.7% and Nasdaq by 2.21%. Japan’s Nikkei 225 fell 1.05% in the last week. Hong Kong’s Hang Seng too didn’t fare well with fall of 3.97% in one week. KOSPI saw positive change in 1 week of 3.83%.

Indian Equity Market Performance & Key Valuation Ratio

Index	17-10-2025	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	25709.85	1.65%	22.36	3.46	1.31
BSE Sensex	83952.19	1.73%	23.22	4.47	1.17
BSE Midcap	46360.28	0.00%	33.41	4.9	0.76
BSE Smallcap	53040.96	-0.64%	33.98	3.68	0.6
BSE 250 LargeMidCap	11035.79	1.24%	24.37	4.38	1.13
Sectoral Indices					
BSE Fmcg	20755.49	2.53%	40.02	8.68	1.76
BSE Commodity	7927.57	-0.37%	27.92	3.23	1.04
BSE CD	10129.37	1.20%	47.35	7.43	0.63
BSE Energy	11611.28	0.44%	12.3	1.94	2.79
BSE Financial Services	12999.34	1.93%	18.41	3.06	0.88
BSE Healthcare	44905.36	0.48%	41.24	6.74	0.53
BSE IT	34179.45	-2.36%	26.17	7.16	2.5
BSE Auto	60627.05	1.65%	29.74	7.04	1.06
BSE Bankex	65058.13	1.82%	15.99	2.78	0.79
BSE Metal	33793.3	-0.58%	19.98	2.9	1.73
BSE Oil & Gas	27326.99	-0.13%	11.5	1.65	2.51
BSE Power	6851.24	0.80%	28.46	4	1.34
BSE Realty	7252.22	3.96%	50.09	5.97	0.32

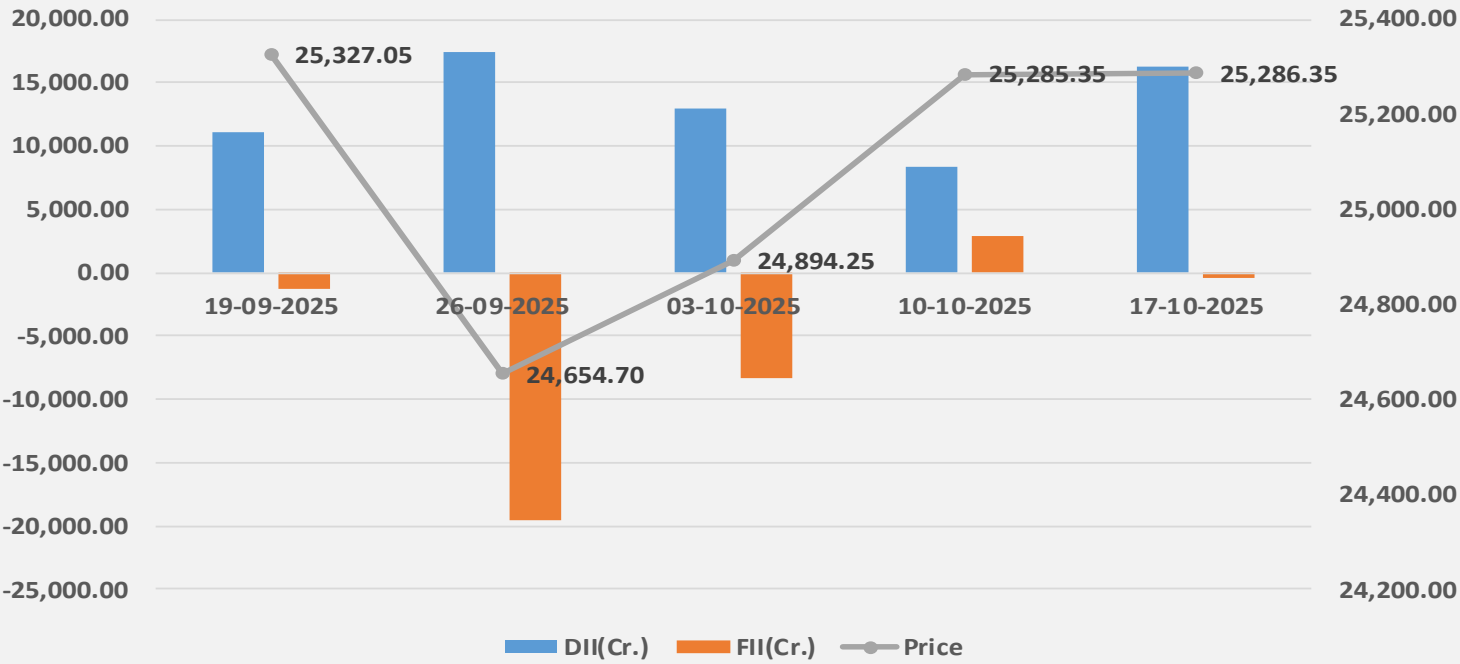
Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Asian Paints Ltd	2507.8	7.20	1.10
M&M	3647.2	5.60	1.50
Adani Ports and Special economic Zone	1479.4	5.00	3.60
Bajaj Finance Ltd	1070.1	4.50	7.80
ICICI bank Ltd	1436.6	4.10	2.50

Losers

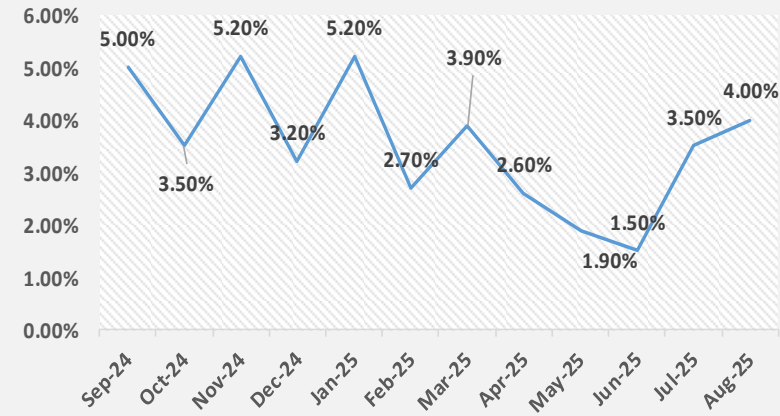
Symbol	LTP	%Change (WoW)	%Change (MoM)
Tata Motors Passengers vehicles Ltd	396.6	-41.60	-44.40
Infosys Ltd.	1441.1	-4.90	-4.70
TCS.	2962.2	-2.20	-5.80
Eternal Ltd	342.7	-1.60	1.80
Tata Steel Ltd.	172.2	-0.90	0.10

FII & DII Investment Flow Vs NIFTY50

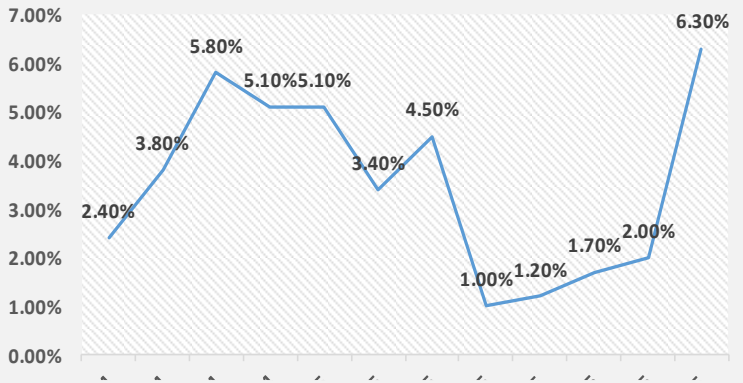


Macro-Economic Performance: India

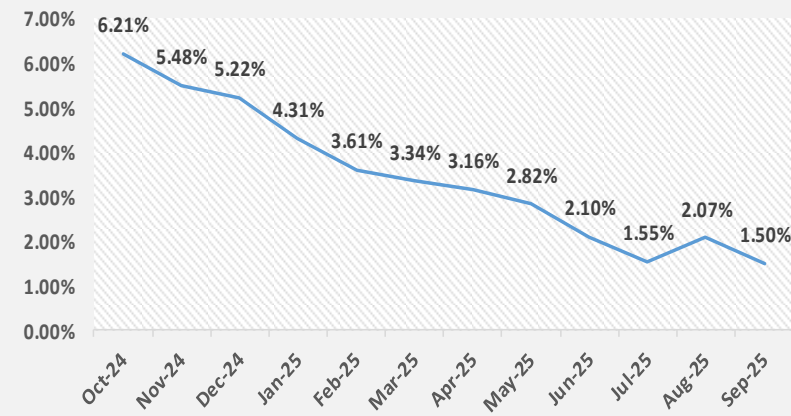
IIP (YoY)



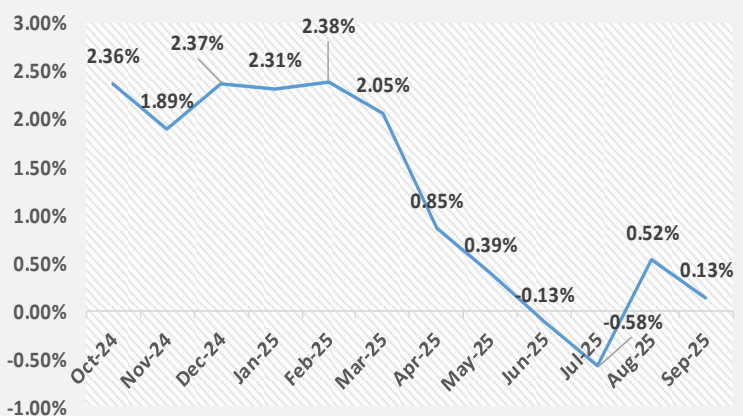
Infrastrucutre Output (YoY)



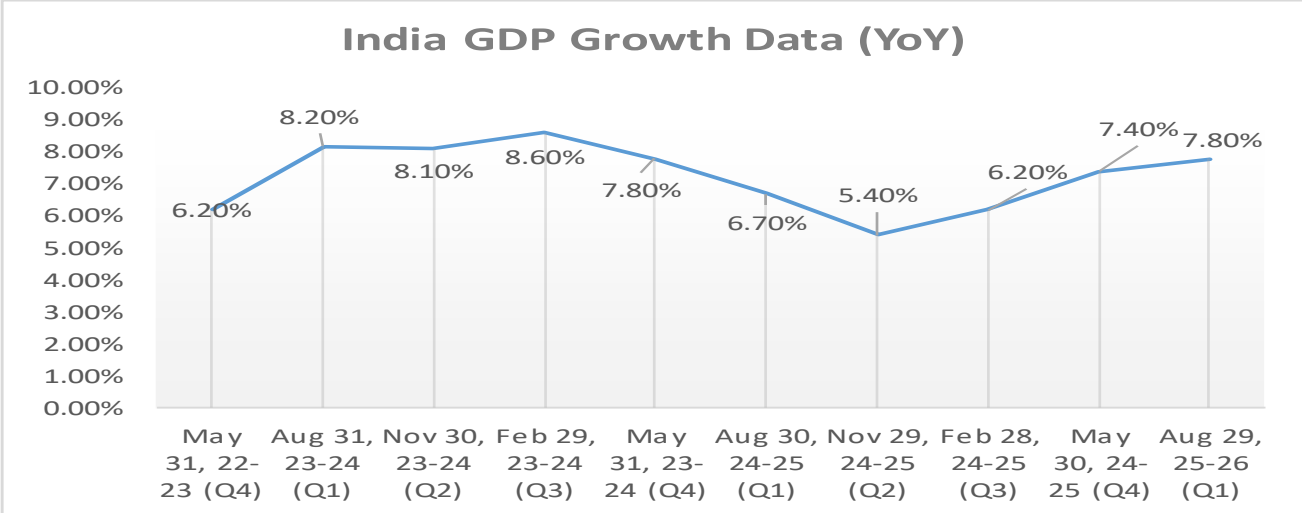
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



NIFTY (25,709.85): The US-China trade war may help Indian exporters, as the US plans to raise tariffs on Chinese goods to 130% from November 1. This makes Indian products like textiles and toys more competitive in the US market. China said it is not afraid of a trade war after Trump announced 100% tariffs on Chinese imports. The Chinese ministry criticized the US for double standards, while global markets reacted nervously, losing \$2 trillion in a single day. Shipping experts say ocean carriers are unlikely to return to the Red Sea soon despite the Israel-Hamas ceasefire, as the Houthis in Yemen may continue attacks until their demands, including Palestinian statehood, are met. Meanwhile, Germany and France signed an agreement to improve missile detection via a satellite system. US stock markets fell as bank stocks dropped due to bad loan worries, amid ongoing US-China trade tensions and a possible government shutdown. The IMF raised Asia’s growth forecast but warned that renewed trade disputes could hurt the region’s economy. The International Monetary Fund has advised the Bank of Japan to keep monetary policy loose and only raise interest rates slowly, as global trade tensions and political uncertainty continue to weigh on Japan’s outlook. Meanwhile, the U.S. budget deficit fell to \$1.775 trillion in fiscal 2025, its first decline since 2022, driven by record customs revenues from new Trump-era tariffs

The Indian stock market has turned optimistic, with the Nifty 50 index showing strong momentum. The index has successfully crossed the important 25,500 level and continued its upward move, closing above 25,700. This indicates that the market is gaining strength, and investors are showing confidence in equities. Analysts believe that if this positive trend continues, the Nifty could move higher towards the 26,000 and 26,300 levels in the near term. The rise reflects buying interest across major sectors like banking, FMCG, and automobiles, suggesting that the market’s overall trend remains healthy and supportive for further gains

The week beginning October 20, 2025, features several key global economic releases that could influence market sentiment. Monday centres on China, with the release of the Loan Prime Rate, Q3 GDP Growth Rate, and September data for Industrial Production, Retail Sales, and Unemployment—metrics crucial for gauging the country’s post-recovery momentum. On Tuesday, India’s Infrastructure Output for September will provide insight into industrial and construction sector health. Wednesday brings Japan’s Balance of Trade, UK inflation readings, and US oil inventory data, offering cues on global trade, energy dynamics, and price pressures. Thursday shifts focus to the United States with updates on Initial Jobless Claims and Existing Home Sales, vital indicators of labour and housing market strength. Friday rounds out the week with comprehensive data from multiple economies: Japan releases its inflation and PMI readings, India announces its Manufacturing and Services PMI flash estimates alongside foreign exchange reserves, while the US reports September inflation figures and PMI flashes. The UK will publish Retail Sales and early PMI readings for October, completing a data-heavy week reflecting global growth, trade, and inflation trends.

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