



18 September 2025

INDIAN EQUITY MARKET

- Indian equity markets rose for a third consecutive session as optimism prevailed over ongoing U.S.-India trade talks and the U.S. Federal Reserve delivered its first rate cut of the year, citing recent sluggishness in the labor market. The U.S. central bank reduced interest rates by 25 bps to a new range of 4.00% to 4.25%, marking its first rate cut since Dec 2024, and signaled two additional 25 bps cuts later this year.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.39% and 0.37% to close at 83,013.96 and 25,423.60 respectively.
- On the BSE sectoral front, Healthcare was the major gainer, up 0.87% followed by Information Technology, up 0.81% and Teck, up 0.57%. Capital Goods was the major loser, down 0.33% followed by Energy, down 0.2% and Industrials, down 0.16%.

CORPORATE NEWS

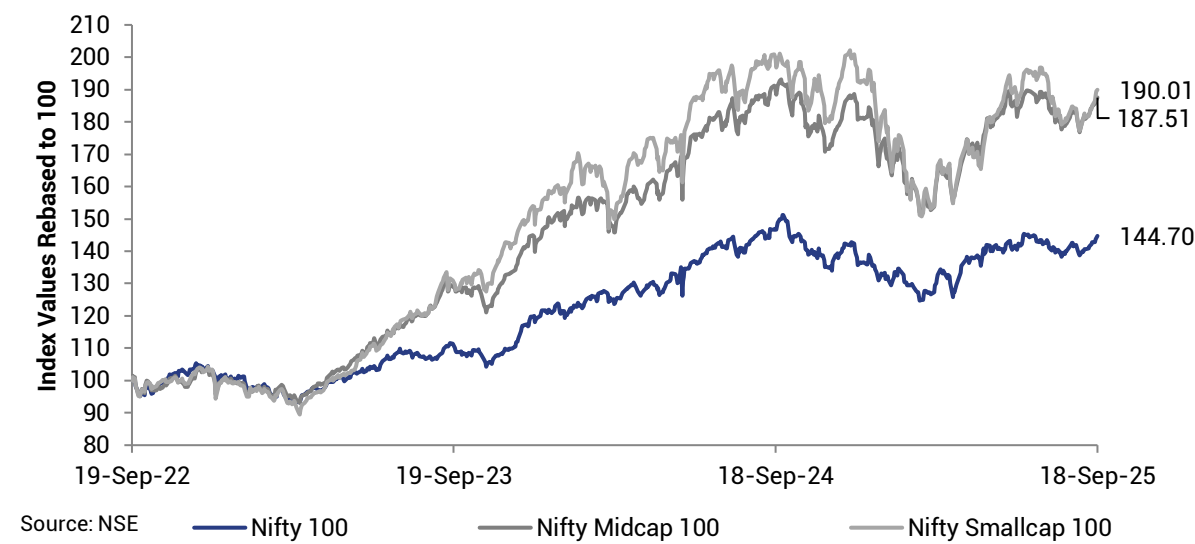
- Maruti Suzuki India has announced price reductions of up to Rs. 1.3 lakh across its vehicle range, effective Sep 22, 2025. The cuts reflect the full benefit of GST along with additional discounts aimed at boosting demand and encouraging a shift from two-wheelers to four-wheelers ahead of the festive season.
- IBM and BharatGen partnered to accelerate AI adoption in India, combining sovereign language models with IBM's AI expertise to build scalable, inclusive solutions across education, agriculture, healthcare, and governance—reflecting India's linguistic and cultural diversity.
- Lupin has received approval from the U.S. FDA to launch a generic version of Lenalidomide capsules in various strengths (2.5 mg to 25 mg). These capsules are used to treat multiple myeloma, a type of blood cancer that affects plasma cells in the bone marrow.

GLOBAL EQUITY MARKET

- The U.S. equities advanced to new highs, supported by strong momentum in the technology sector. A notable rally in semiconductor and cybersecurity stocks lifted sentiment. Investors responded positively to strategic partnerships and capital investments in AI infrastructure, while economic indicators reflected easing labor market pressures.
- European markets gained on rate cut optimism and tech sector strength. Mixed performances across regions and cautious economic data tempered broader upside.
- Asian equities declined after a slightly hawkish U.S. Federal Reserve decision, as inflation concerns from rising goods prices signaled persistent pressure into next year, prompting cautious investor sentiment across regional markets. Today (as of Sept 19), Asian equity markets opened on a higher note ahead of Bank of Japan decision after encouraging inflation numbers.

INDIAN DERIVATIVES MARKET

- Nifty Sep 2025 Futures stood at 25,510.90, a premium of 87.30 points above the spot closing of 25,423.60. The turnover on NSE's Futures and Options segment fell to Rs.6,593.49 crore on September 18, 2025, compared with Rs. 5,75,660.95 crore on September 17, 2025.
- The NSE Put-Call ratio stood at 0.97 compared with the previous session's close of 0.8.



EQUITY MARKET UPDATE

Indian Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty 50	25,424	0.37	2.20	0.18	7.52	26,277	21,744	22.33	22.01
Nifty 100	26,082	0.35	2.31	-1.28	6.48	27,336	22,177	22.18	22.55
Nifty 500	23,519	0.31	2.56	-1.59	5.11	24,573	19,520	24.60	23.98
Nifty Midcap 100	59,073	0.38	3.43	-1.14	3.28	60,926	46,866	32.19	30.80
Nifty Smallcap 250	17,482	0.06	3.57	-5.38	-1.52	18,688	13,315	33.37	26.43
Nifty SME Emerge	15,594	0.40	3.58	-2.56	-6.09	17,224	11,930	26.98	41.53

Source: MFI 360 Explorer

Sector Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Auto	27,329	0.13	8.76	5.91	19.69	27,696	19,317	28.05	27.73
Nifty Bank	55,727	0.42	-0.01	5.64	9.57	57,628	47,703	15.18	15.55
Nifty FMCG	56,522	0.36	2.20	-12.52	-0.49	66,439	50,199	42.37	43.81
Nifty IT	36,750	0.83	6.11	-12.69	-15.20	46,089	30,919	26.54	28.53
Nifty Media	1,628	-0.30	-1.32	-22.78	-10.46	2,182	1,344	164.24	397.44
Nifty Metal	9,955	0.32	6.05	6.92	15.09	10,322	7,690	19.06	21.82
Nifty Pharma	22,574	1.50	1.96	-1.96	-3.58	23,908	19,121	32.75	33.74
Nifty Realty	918	-0.07	2.23	-13.66	-12.72	1,140	766	44.04	50.17
Nifty Energy	35,442	-0.35	2.78	-16.31	0.72	44,721	29,313	15.48	13.84

Source: MFI 360 Explorer

Thematic Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Financial Services	26,699	0.51	0.34	9.75	13.55	27,370	22,358	17.47	17.58
Nifty India Consumption	12,485	0.34	3.27	0.10	9.88	13,058	10,091	42.64	43.21
Nifty Infrastructure	9,230	0.06	1.97	-1.16	9.06	9,704	7,590	22.18	21.74
Nifty MNC	30,583	0.16	5.19	-1.92	9.49	32,841	23,981	35.92	42.58
Nifty Public Sector Enterprise	9,840	-0.05	3.06	-8.96	3.23	11,380	7,956	11.98	10.57

Source: MFI 360 Explorer

Global Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nasdaq 100	24,455	0.95	3.13	26.42	16.38	24,555	16,542	35.23	30.13
Nasdaq Composite	22,471	0.94	3.89	27.87	16.36	22,541	14,784	33.14	21.67
FTSE 100	9,228	0.21	0.77	11.81	12.91	9,358	7,545	17.85	12.50
CAC 40	7,855	0.87	-0.37	5.50	6.42	8,258	6,764	17.85	14.18
DAX	23,675	1.35	-2.63	26.52	18.91	24,639	18,490	18.67	23.97
Nikkei	45,303	1.15	3.64	24.53	13.56	45,509	30,793	20.75	18.51
Hang Seng	26,545	-1.35	5.43	50.31	32.33	27,058	17,602	12.35	10.11
SSE Composite Index	3,832	-1.15	2.78	41.01	14.32	3,900	2,698	12.00	12.13

Source: MFI 360 Explorer; Returns are based in local currency

F&O Trends	Px Last	Previous	Change %
Near Futures	25,510.90	25,423.40	0.34
Near Basis	87.30	93.15	-6.28
Mid Futures	25,629.10	25,540.00	0.35
Mid Basis	205.50	209.75	-2.03
Near Open Interest (Cr.)	1.55	1.57	-1.12
Mid Open Interest (Cr.)	0.19	0.18	9.65
Rollover (%)	13.44	12.33	9.01

Source: NSE

Transaction Trends (Equity)					
Amount in ₹ Cr.					
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	13,185	13,465	-280	-8,730	-139,364
Mutual Funds**	8,455	6,673	1,782	20,818	369,439

*As on 18th September 2025;**As on 16th September 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- The Ministry of Consumer Affairs has announced that companies are not required to revise price stickers on pre-packaged goods manufactured before Sept 22, 2025, following the recent GST rate change. However, companies may voluntarily affix updated price stickers, provided the original price remains clearly visible.
- India's pension regulator may increase infrastructure investments following the government's launch of a credit enhancement program for bonds, operated by the National Bank for Financing Infrastructure and Development (NaBFID), to improve ratings and attract institutional investors.
- According to India's Commerce Minister, India and the UAE aim to raise non-oil, non-precious metals trade to USD 100 billion within three years, reflecting deepening investment ties.

INDIAN DEBT MARKET

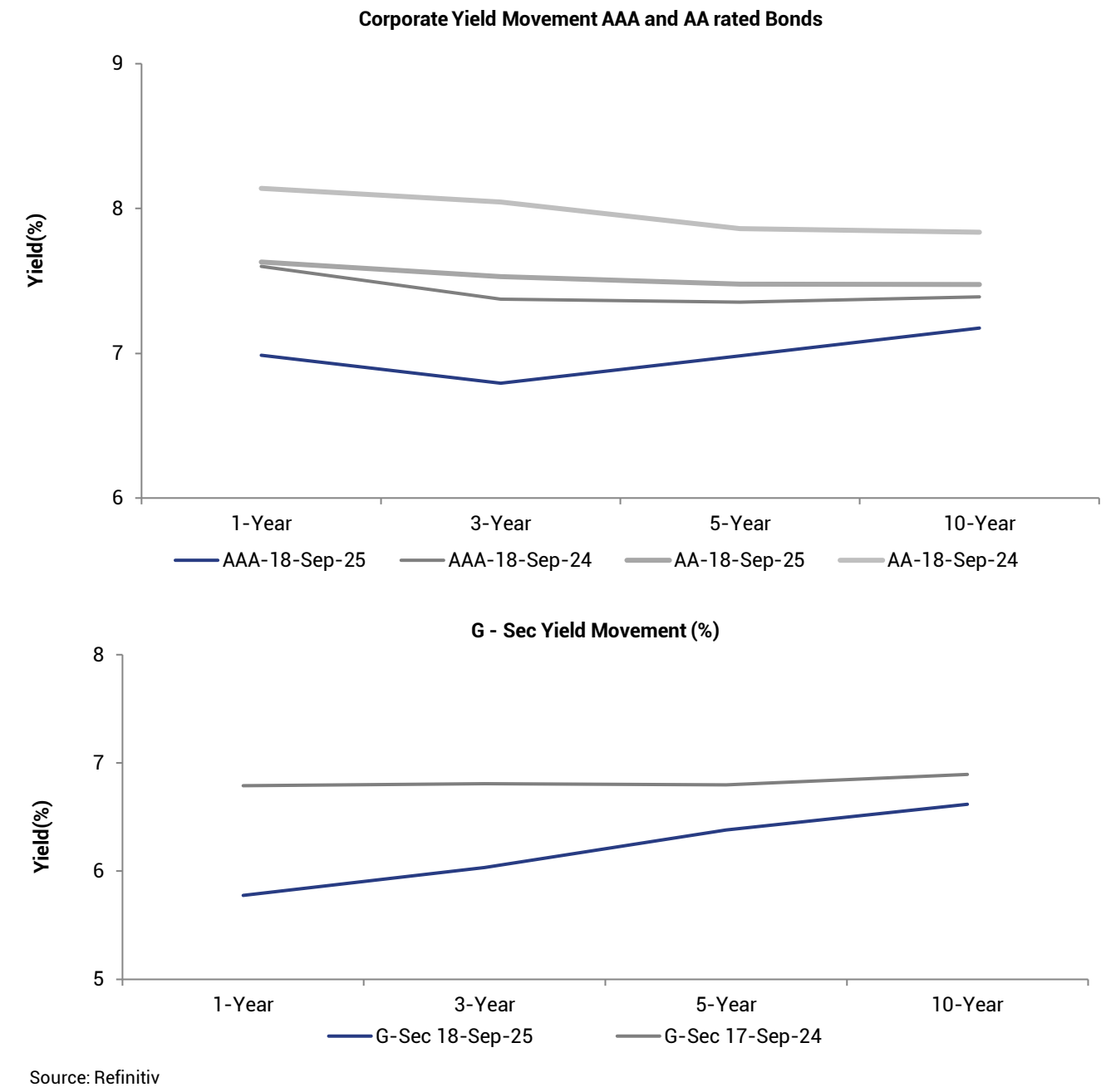
- Bond yields climbed despite a 25 bps rate cut by the U.S. Federal Reserve in its Sep 2025 policy meeting, as hawkish commentary from the Fed Chair overshadowed the rate cut expectations. The rate cut was described as a "risk-management" move, and the Chair emphasized a data-dependent approach, stating that future decisions would be made on a "meeting-by-meeting" basis.
- Yield on the 10-year benchmark paper (6.33% GS 2035) rose by 4 bps to close at 6.51% as compared to the previous close of 6.47%.
- RBI announced to conduct the auction of 6-day Variable Rate Repo for the notified amount of Rs. 1,00,000 crore on Sep 19, 2025.

MONEY MARKET

- According to media reports, Godrej Industries has accepted bids worth Rs. 800 crore for separately transferable redeemable principal part bonds maturing in five years and six months. The company will pay an annual coupon of 7.89%.

SPREAD ANALYSIS

- Yields on gilt rose up to 4 bps across the maturities, barring 1 year paper that fell by 1 bps, while 3 year paper was unchanged.
- Corporate bond yields increased up to 5 bps across the curve, baring 2 year paper that was unchanged.
- Difference in spread between AAA corporate bond and gilt expanded up to 3 bps across the segments, barring 2 & 4 year papers that contracted by 2 & 1 bps, respectively, while 10 year paper remained steady.



Key Indicators	Current	Previous
GDP (Q1 FY'26)	7.80%	7.40%
IIP (Jul'25)	3.50%	1.50%
Manufacturing PMI Aug'25	59.30	59.10
Credit Growth (Aug 22,2025)	10.00%	10.20%
Deposit Growth (Aug 22,2025)	10.20%	10.10%
WPI (Aug'25)	0.52%	-0.58%
CPI (Aug'25)	2.07%	1.61%
Current Account Deficit (Q1 of FY26, in \$ Billion)	2.40	-13.50
Fiscal Deficit (Apr to Jul 2025, as a % of Budget Estimates)	27.79	16.66
Trade Deficit (In \$ billion-Aug25)	26.49	27.35

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

Source: Refinitiv

DEBT MARKET UPDATE

Policy Rates (%)	18-Sep-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	5.50	5.50	5.50	6.50
CRR	3.75	3.75	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	18-Sep-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.60	5.39	5.45	7.12
CALL	5.55	5.35	5.40	6.65
T-Repo	5.48	5.30	5.32	6.60
OIS- 3 M	5.47	5.47	5.49	6.60
OIS- 6 M	5.44	5.43	5.50	6.49

Source: FBIL

Certificate of Deposit (%)	18-Sep-25	Week Ago	Month Ago	Year Ago
3-Month	5.79	5.87	5.82	7.29
6-Month	6.14	6.17	6.09	7.49
9-Month	6.31	6.34	6.29	7.62
12-Month	6.47	6.43	6.37	7.68

Source: Refinitiv

Commercial Paper (%)	18-Sep-25	Week Ago	Month Ago	Year Ago
3-Month	5.80	5.93	5.90	7.34
6-Month	6.19	6.22	6.09	7.56
12-Month	6.37	6.42	6.37	7.72

Source: Refinitiv

Maturity Buckets Yield	Yield (%)				Change in bps		
	Closing	Previous	1 Month	1 Year	1 Day	1 Month	1 Year
1 Yr GOI Bond	5.70	5.70	5.67	6.68	-1	3	-98
3 Yr GOI Bond	5.95	5.95	6.05	6.70	0	-10	-75
5 Yr GOI Bond	6.28	6.28	6.34	6.69	1	-6	-41
10 Yr GOI Bond	6.51	6.47	6.49	6.78	4	2	-27
15 Yr GOI Bond	6.83	6.80	6.87	6.84	3	-4	-1
US 10 Yr Treasury	4.10	4.08	4.34	3.69	3	-24	42

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	18-Sep-25	1 Month Avg.	1 Year Avg.	18-Sep-25	1 Month Avg.	1 Year Avg.
1 Yr	121	117	99	185	203	164
3 Yr	76	74	79	149	153	147
5 Yr	60	57	71	110	123	130
10 Yr	56	56	53	86	92	108

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	18-Sep-25	Week Ago	Month Ago	Year Ago
Govt Securities	45,443	62,338	42,821	58,642
Call Money	21,491	21,886	16,503	10,794
T-Repo	434,546	427,107	420,801	357,241
LAF	NA	NA	NA	NA
Treasury Bills	3,397	4,475	3,412	4,056
Interbank Liquidity	NA	NA	NA	NA

Source: Refinitiv

Transaction Trends (Debt)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	702	367	335	236	7,727
Mutual Funds**	18,946	19,606	-660	-39,376	-445,596

*As on 18th September 2025;**As on 16th September 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: September 15-19 ,2025	36,000	0	N.A
Month: Sep 2025	121,000	53,000	43.80%
H1: Apr 25-Sep 25	800,000	727,000	90.88%

Source: RBI

GLOBAL ECONOMY

- The U.S. Federal Reserve announced on Sep 17, 2025, that it has decided to lower interest rates by a quarter point, marking the first rate cut of the year. The Fed stated that it is reducing the target range for the federal funds rate by 25 basis points to 4.00%–4.25%, citing a shift in the balance of risks.

INTERNATIONAL MARKET UPDATE

- Japan's core machinery orders, which exclude ships and electric power companies, fell by 4.6% in Jul 2025 compared to the previous month, according to official data.

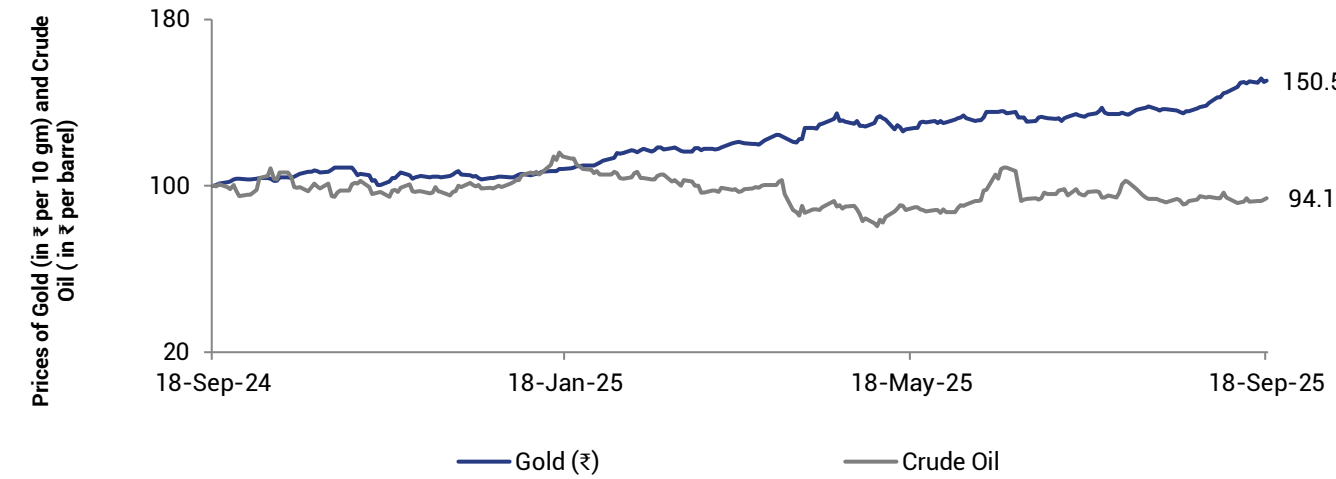
COMMODITY MARKET

- Gold prices declined as investors took profits after a record peak, while markets evaluated the Federal Reserve's stance on future rate cuts.
- Brent crude oil prices (spot) declined after data showed an increase in U.S. fuel inventories.

CURRENCY UPDATE

- The Indian rupee fell in spot trading against the U.S. dollar, impacted by the Fed's hawkish tone and the dollar's recovery.
- The euro weakened against the U.S. dollar, pressured by the Fed's hawkish stance and a rebound in the dollar.

CRUDE OIL VS. GOLD (IN ₹)



COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,644	-0.43	9.42	42.41	38.88	3,689	2,561
Silver (\$/oz)	42	0.35	9.97	39.06	44.77	43	29
NYMEX Crude(\$/bbl)	64	-0.78	-1.01	-11.16	-11.86	81	58
Brent Crude(\$/bbl)	70	-0.72	2.37	-8.17	-7.88	84	62
Baltic Dry Index	2,205	1.15	9.05	16.67	121.16	2,258	715
Core Commodity Index	373	-0.77	2.12	12.44	4.68	386	331
Industrial Metals Index	NA	NA	NA	NA	NA	NA	NA
Agriculture Index	NA	NA	NA	NA	NA	NA	NA
Energy Index	NA	NA	NA	NA	NA	NA	NA
Precious Metals Index	NA	NA	NA	NA	NA	NA	NA

Source: Refinitiv

Composite PMI Data	Latest Reported	1 Month Ago	3 Months Ago	6 Months Ago	1 Year Ago
U.S.	53.00	50.60	51.60	54.90	54.50
Euro Zone	51.00	50.90	50.20	50.20	51.00
Germany	50.50	50.60	48.50	50.40	48.40
France	49.80	48.60	49.30	45.10	53.10
U.K.	53.50	51.50	50.30	50.50	53.80
Japan	52.00	51.60	50.20	52.00	52.90
China	51.90	50.80	49.60	51.50	51.20

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	109,696	0.36	10.58	50.57	44.50	110,494	67,984
Silver (1 kg)	126,931	1.20	11.35	45.57	47.85	128,940	78,617
Crude Oil (1 bbl)	5,621	0.86	0.45	-5.81	-7.35	7,249	1,277
Natural Gas (1 mmbtu)	272	1.53	9.46	39.63	-19.14	392	138
Aluminium (1 kg)	261	-0.23	2.96	12.50	7.67	267	209
Copper (1 kg)	910	-0.25	2.89	12.16	14.06	934	772
Nickel (1 kg)	1,343	-0.31	0.80	-2.12	0.38	1,783	1,276
Lead (1 kg)	186	-1.33	0.51	-3.88	-1.09	201	179
Zinc (1 kg)	281	-0.86	4.33	4.08	-1.21	301	241
Mentha Oil (1 kg)	1,029	0.00	0.95	4.09	3.48	1,046	916
Cotton (1 bales)	NA	NA	NA	NA	NA	NA	NA

Source: MCX-SX

CURRENCY MARKET UPDATE

Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
USD/INR	88.13	0.36	0.89	5.23	2.93	88.46	83.44
EUR/INR	103.94	0.31	2.13	11.76	17.34	104.52	87.29
GBP/INR	119.53	0.00	1.41	8.15	11.67	120.37	104.67
YEN(100)/INR	59.58	-0.15	0.94	1.35	9.48	60.83	53.87
SGD/INR	68.76	0.21	1.18	6.47	9.76	68.98	62.21

Source: Refinitiv

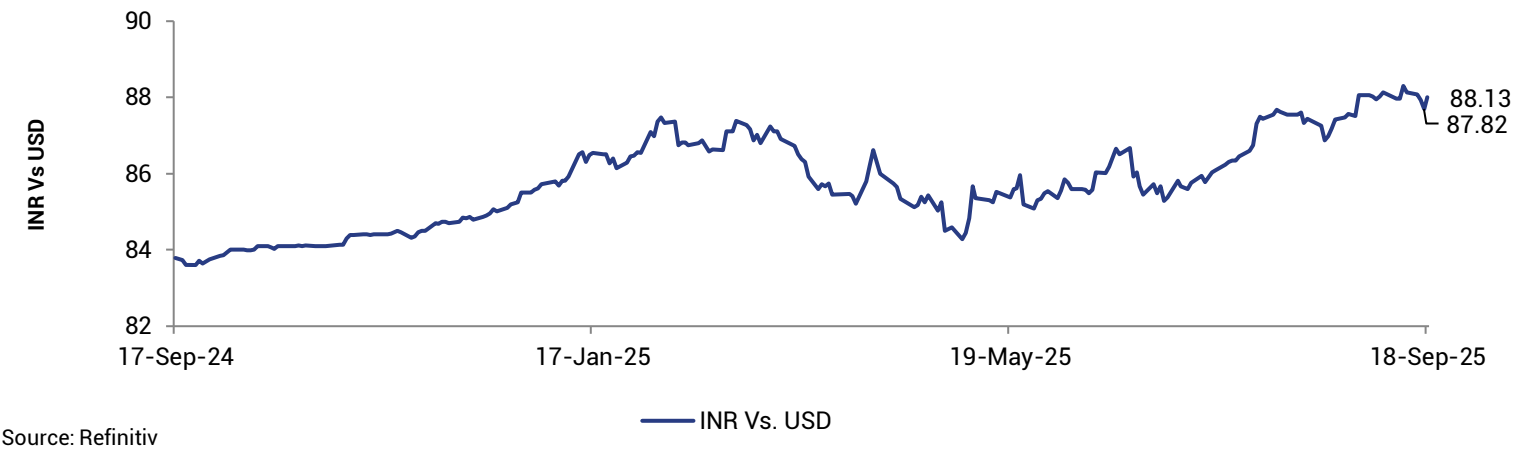
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.18	-0.22	1.08	6.01	13.84	1.19	1.01
GBP/USD	1.36	-0.52	0.39	2.59	8.34	1.38	1.21
USD/JPY	147.99	0.69	0.09	4.02	-5.85	158.87	139.86
SGD/USD	0.78	-0.32	0.20	1.03	6.51	0.78	0.73
Dollar Index	97.35	0.49	-0.83	-3.23	-10.27	110.18	96.22

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	88.15	0.30	2.64	0.85	1.89
Future 3 Month	88.37	0.35	2.76	0.69	1.75
Future 6 Month	89.01	0.23	3.25	0.73	1.76
NDF 1 Month	88.36	0.44	2.90	1.05	2.10
NDF 3 Month	88.67	0.45	2.70	1.07	2.17
NDF 6 Month	88.70	-0.08	2.12	0.58	1.67

Source: Refinitiv

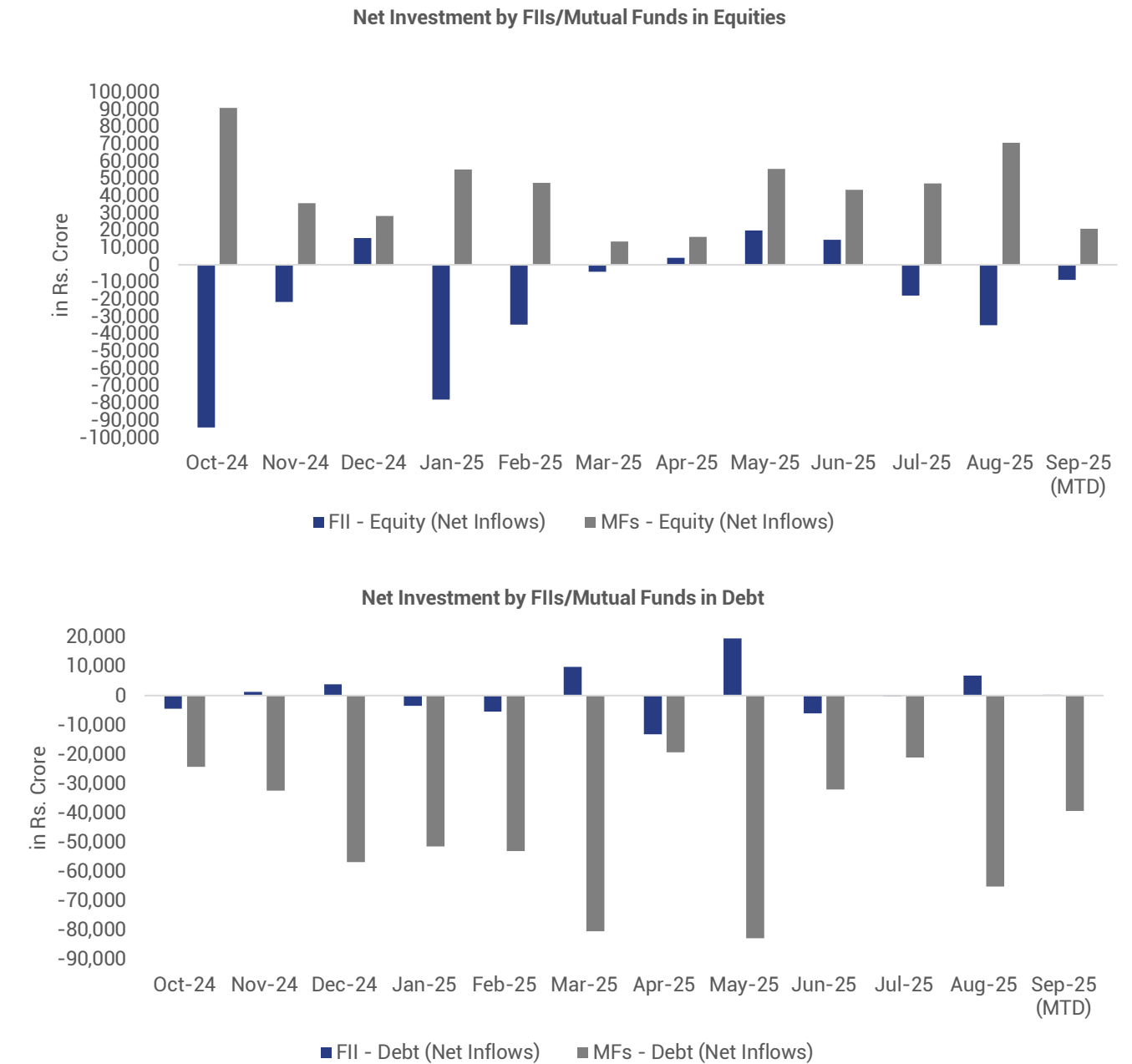
RUPEE VS. U.S. DOLLAR



MUTUAL FUND AND INSURANCE UPDATE

- AMFI has proposed that SEBI allow mutual fund houses to use Investor Awareness Program (IAP) budgets to incentivize distributors for onboarding investors from beyond the top 30 cities (B30) and women investors. The suggested incentive is a one-time fee of 1% of the first investment or committed SIP amount, capped at Rs.2,000, likely funded from the IAP corpus. SEBI is expected to issue final guidelines soon.
- The Insurance Regulatory and Development Authority of India has launched the Bima Sugam website, marking a major step toward open architecture in insurance distribution. Designed as a unified digital platform, Bima Sugam will allow customers to buy, renew, port, and claim insurance policies across life, health, and general categories in a paperless manner. Backed by the Life and General Insurance Councils, the platform aims to enhance transparency, efficiency, and accessibility, with full-scale operations expected by Dec 2025.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Forex Reserves	19-Sep-25
Loans and Advances to Central Government	19-Sep-25
Loans and Advances to State Government	19-Sep-25
Reserve Money	24-Sep-25
Currency in Circulation	24-Sep-25
Banker's Deposits with RBI	24-Sep-25

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MF SCHEMES CATEGORY WISE PERFORMANCE

Category-Equity	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Large Cap Fund	1.79	2.29	12.60	-0.48	15.14	18.41
Mid Cap Fund	1.67	2.79	18.72	-0.56	21.06	25.33
Large & Mid Cap Fund	1.76	2.54	15.57	-0.51	18.56	22.33
Small Cap Fund	1.68	3.09	18.74	-3.65	20.23	27.67
Multi Cap Fund	1.67	2.77	15.96	-0.60	19.27	23.79
Focused Fund	1.81	2.64	14.09	-1.48	16.34	19.61
Value Fund	1.77	2.55	13.16	-3.01	19.39	23.00
Contra Fund	1.56	2.23	13.73	-1.77	20.71	25.05
ELSS	1.65	2.49	15.10	-1.49	17.36	21.95
Sectoral	1.56	2.03	14.57	0.28	19.71	22.73
Thematic	1.54	3.20	16.28	-1.14	19.06	21.97
Dividend Yield Fund	1.68	2.68	12.12	-3.64	19.90	22.95

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Category-Debt	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Overnight Fund	5.26	5.24	5.53	6.04	6.36	5.18
Liquid Fund	6.03	5.51	6.40	6.79	6.91	5.56
Ultra Short Duration Fund	6.24	5.21	7.11	7.04	6.79	5.55
Low Duration Fund	6.37	5.04	8.05	7.60	7.10	5.82
Money Market Fund	6.81	5.42	7.84	7.56	7.20	5.82
Short Duration Fund	6.20	4.69	8.57	7.86	7.30	6.05
Medium Duration Fund	8.09	6.09	8.71	8.19	7.49	6.84
Medium to Long Duration Fund	8.09	4.30	5.71	5.76	6.81	5.40
Long Duration Fund	21.34	6.64	1.98	3.62	7.42	5.36
Corporate Bond Fund	5.62	4.69	8.92	8.00	7.41	6.03
Gilt Fund	14.16	7.00	3.32	4.50	6.83	5.30
Gilt Fund with 10 year constant duration	-2.38	7.12	7.47	7.36	7.88	5.62
Dynamic Bond	9.93	4.92	5.67	5.76	6.99	5.72
Banking and PSU Fund	6.20	4.37	8.54	7.70	7.20	5.91
Floater Fund	5.93	4.47	8.41	7.88	7.64	6.28
Credit Risk Fund	9.92	7.29	10.78	10.45	8.55	9.25

Less than 1 yr return are simple annualised and greater than 1 yr returns are CAGR

Category-Hybrid	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Arbitrage Fund	0.04	0.36	3.00	6.26	6.74	5.39
Balanced Advantage	1.07	1.66	8.83	1.67	12.07	12.48
Aggressive Hybrid Fund	1.40	1.99	11.72	1.18	14.76	17.48
Equity Savings	0.60	1.19	6.86	4.81	10.04	10.53
Conservative Hybrid Fund	0.46	0.83	5.37	4.81	9.03	9.28
Multi Asset Allocation	1.18	3.05	12.16	7.34	17.09	17.97

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Source: MFI 360 Explorer

Event	Date
Index of Industrial Production (Aug 2025)	28-Sep-25
Manufacturing output (Aug 2025)	28-Sep-25
Infrastructure Output	30-Sep-25
Fiscal deficit (as a % of budget estimates)	30-Sep-25
Revenue deficit	30-Sep-25
Tax Revenue	30-Sep-25