

Weekly Market Report – India and Global: 13–17 October 2025 (Monday to Friday)

The Market Saga Before Dhanteras

The week just before Diwali proved to be a rollercoaster ride for Indian and global markets. On one hand, gold prices hit record highs ahead of Dhanteras (18 October), while on the other, US-China trade tensions shook markets worldwide.

The Indian market showed a remarkable recovery on Wednesday after a weak start to the week. Foreign investors' (FII) selling slowed down, and domestic investors (DII) supported strong buying. The IPO market witnessed a blockbuster listing of LG Electronics, and some companies delivered excellent results during the corporate earnings season.

This week demonstrates how the festive season, geopolitical tensions, and investor sentiment together determine market direction. Let's explore the full story of this week...

Part 1: Indian Stock Market – Volatility Amid Festivals

Day-by-Day Detailed Analysis:

Monday, 13 October 2025 – Weak Start

The week began on a disappointing note for Indian markets. Sensex fell 173.77 points (0.21%) to close at 82,327.05, while Nifty 50 dropped 58 points (0.23%) to 25,227.35.

Reason: US President Donald Trump had warned of "restrictive" tariffs on China on Friday night, making investors cautious. Although his tone softened on Sunday, market caution persisted.

Key Highlights:

- Biggest losers: Tata Motors (-2.7%), Infosys, HUL, Power Grid (~ -1%)
- Gainers: Adani Ports, Bajaj Twins, NTPC, Axis Bank
- Intraday low: Sensex touched 82,043
- Most sectors showed a negative trend

Tuesday, 14 October 2025 – Decline Continues

Markets continued to face pressure. Nifty 50 fell 0.32% to close at 25,145.50, while Sensex dropped 0.36% to 82,029.98.

Reasons for market pressure:

- Weak global cues and uncertainty
- Profit-booking in heavyweight stocks
- Caution ahead of major economic data releases
- Impact of Trump's tariff statements

Sector performance: Most sectors remained in the red, reflecting cautious investor sentiment. Two consecutive days of declines increased negative sentiment.

Wednesday, 15 October 2025 – Day of Strong Recovery!

This day became the week's turning point. Nifty 50 surged 178.05 points (0.71%) to 25,323.55, and Sensex rose 575.45 points (0.7%) to 82,605.43.

Star Performers – Heroes of the Day:

- Bajaj Finance: +3.99% (top gainer) 💰
- Nestlé India: +3.90%
- Asian Paints: +2.46%
- HDFC Life: +2.37%
- L&T: +2.25%
- ICICI Bank: +1.03%

Lagging Stocks:

- Infosys: -1.04%
- Tata Motors: -1.16%
- Axis Bank: -0.61%

Special Note: 22 out of 30 Sensex companies gained. Strong demand was seen in banking, financial services, and infrastructure sectors, indicating confidence in domestic demand.

Thursday, 16 October 2025 – Stability and Strength

The market maintained Wednesday's momentum. Mixed trading was observed amid strong global cues. Investors remained focused on corporate earnings and upcoming Dhanteras preparations.

Friday, 17 October 2025 – Positive Close Before Dhanteras

BSE Sensex rose 152 points in early trade to 83,619.66, while NSE Nifty increased 31.65 points to 25,616.95. Sensex closed at 83,768 points, reflecting a 0.36% gain from the previous session. This positive close before Dhanteras shows festive optimism.

Weekly Overview – The Bigger Picture

Weekly Performance:

- Sensex: Strong gain of ~1,441 points (82,327 → 83,768)
- Nifty 50: Increase of ~389 points (25,227 → 25,616)
- Monthly Performance: Up 0.91% compared to last month
- Yearly Performance: Up 3.13% compared to last year

Weekly Pattern: Monday-Tuesday decline → Wednesday's strong recovery → Thursday-Friday stability and further gains

Market Mood: Positive sentiment prevailed after Wednesday's recovery, boosted by the festive season.

FII and DII Activities – Key Changes

Foreign Investors (FII) – Return to Buying

Between 7–14 October, FIIs bought over ₹3,000 crore in seven sessions. NSDL data shows FIIs were net buyers in five of the seven sessions.

Weekly Data:

- 13 October: FII net sell ₹240 crore
- 14 October: FII sell ₹1,508.5 crore
- Overall trend improved – selling reduced compared to previous months

Domestic Investors (DII) – Strong Support Continues IN 🧑🏻

DII Performance:

- 13 October: DII bought ₹2,333 crore
- 14 October: Stronger buying of ₹3,661.1 crore

Conclusion: Continuous strong support from DIIs provides short-term market stability. Reduced FII selling combined with DII buying is a very positive signal for Indian markets.

Sectoral Performance – Winners and Laggards

Best Performing Sectors:

1. Banking 🏦 – Strong recovery, gains in ICICI Bank, HDFC Bank, supported by South Indian Bank results
2. Financial Services 📁 – Bajaj Finance +3.99% on Wednesday, HDFC Life strength, strong banking support
3. IT 💻 – Gains in HCL Tech, LTIMindtree after strong Q2 results, Persistent Systems performed well
4. FMCG 🛒 – Festive demand boost, Nestlé India +3.90%, HUL slight weakness
5. Infrastructure & Construction 🏗️ – L&T +2.25%, supported by government spending and projects

Weak Performing Sectors:

1. Metals ⚙️ – Minor decline due to global demand concerns
2. Auto 🚗 – Pressure on Tata Motors (-2.7% on Monday), some profit-booking
3. Oil & Gas 🛢️ – Impact of falling crude prices

Q2 FY26 Earnings – Key Corporate Highlights

Stellar Performers:

1. Waaree Energies – Solar Star 🌞, consolidated net profit doubled to ₹871.21 crore due to higher revenue

2. LTIMindtree – IT shine 🖥️, Q2 consolidated net profit up 10.3% to ₹1,381 crore
3. Persistent Systems – Huge jump 🚀, Q2 profit up 45.1% YoY to ₹471.5 crore, revenue up 23.6% to ₹3,580.7 crore, EBIT +43.5% to ₹583 crore, margin improved from 14% to 16.3%
4. South Indian Bank – Banking strength 🏦, net profit up 8% to ₹351 crore
5. Sunteck Realty – Real estate rise 🏠, net profit up 41% to ₹48.96 crore
6. Paradeep Phosphates – Major merger 🌿, merger with Mangalore Chemicals & Fertilisers Ltd effective 16 October 2025, increasing fertilizer capacity by 23% to 3.7 million tons/year

Mixed Performance:

- Tech Mahindra 🖥️: Profit down 4.4% YoY to ₹1,194.5 crore; revenue up 5.1% to ₹13,994.9 crore; EBIT +32.7% to ₹1,699.3 crore; margin improved from 9.61% to 12.14%
- Wipro 📉: Heavy selling in early trade; stock fell over 4% to ~₹242
- Zee Entertainment 📺: Q2 net profit down 63.46% to ₹76.5 crore due to content investments

Part 2: Gold and Silver – Record Surge Before Dhanteras

Gold – Biggest Rally of 2025 🌟💡

17 October 2025 – Record Highs!

- 24K: ₹13,277/gm
- 22K: ₹12,170/gm
- 18K: ₹9,958/gm

MCX Gold December Futures: Up ₹2,400 (~2%) to ₹1,32,294 per 10 gm

February 2026 Futures: ₹1,33,211 per 10 gm, up ₹2,114 (1.61%)

International Market: Spot gold rose 0.9% to \$4,362.39/oz, after reaching a record high of \$4,378.69

13 October Onwards – Continuous Rally:

22K crossed ₹125,400/10 gm, 24K above ₹125,000/10 gm

1-Year Returns – Gold Treasure 💰

63% increase from Dhanteras 2024 to 2025

Reasons for Record Surge:

1. Weak Dollar
2. Central Bank Buying (Inflation hedge)
3. Festive Demand – Dhanteras & Diwali
4. FOMO – Fear of Missing Out
5. Geopolitical Tensions

6. Economic Uncertainty

Silver – Strong Despite Correction

17 October – Slight dip to ₹1,85,000/kg from ₹1,89,000/kg on 16 October

MCX Silver Futures: Maturing 5 December, started session at ₹1,68,100/kg, intraday high ₹1,70,415

City Prices (17 Oct): Delhi & Mumbai ₹1,85,000/kg, Kolkata ₹1,88,900, Chennai ₹2,03,000

Expert Advice: Support ₹1,64,400–₹1,66,000; Resistance ₹1,69,200–₹1,71,000; book partial profits, wait for correction before buying

Part 3: IPO Market – New Listings and Blockbuster Subscriptions

Major IPO Activities:

1. LG Electronics India IPO – Week's Star 🌟 🎉
 - 54.02x subscription
 - Trading began 14 October on NSE & BSE
 - Price band ₹1,080–1,140/share; OFS ₹11,607.01 crore
 - Strong returns on listing
2. Midwest IPO – Strong Demand 🏢
 - Book-built issue ₹451 crore
 - Open: 15 Oct; Close: 17 Oct; Allotment: 20 Oct; Listing: 24 Oct
 - Price band ₹1,014–1,065/share
 - Subscription 12.34x on 2nd day
3. Rubicon Research IPO – Excellent Response 📈
 - Open: 9 Oct; Close: 13 Oct
 - Price band ₹461–485/share; Fresh issue ₹500 crore; OFS ₹877.5 crore
 - Subscription 27.78x
4. Canara Robeco AMC IPO 📁 – ₹1,326.13 crore OFS, 4.98 crore shares

IPO Market Trend: Strong investor appetite in 2025; activity rising across SME to large-cap segments

Investor Tips:

- Focus on fundamentals, not just subscription numbers
- Avoid grey market premium
- Maintain long-term perspective
- Apply according to risk appetite

Part 4: Major Deals and M&A Activities

Paradeep Phosphates – Mangalore Chemicals Merger

Effective 16 Oct 2025:

- Capacity +23% to 3.7 million tons/year
- Better operational efficiency
- Strong market position
- Cost synergies

Part 5: Global Market Overview

US Market – Volatility Amid Trump Tariffs US

- S&P 500 & Nasdaq fell on 17 Oct
- Trump announced “big tariffs” on China
- Weekly trend: Mon-Tue weak, Wed-Thu partial recovery, Fri pressure returns

Chinese Market – Tariff Impact CN

- Hang Seng under pressure, Shanghai Composite weak

European Market EU

- Cautious amid US-China trade tensions; mixed trading waiting for economic data

Asian Market 🌐

- Japan (Nikkei): Mixed
- South Korea (KOSPI): Some gains
- Taiwan: Interest in tech stocks

Part 6: Commodity Market – Oil to Bitcoin

Crude Oil 🛢️ – Mixed trading, Middle East tensions, global demand concerns; stable prices good for India (importer)

Bitcoin & Crypto 💰 – Maintained momentum in 2025; institutional adoption increasing; Ethereum & altcoins see continued interest

Part 7: Market Volatility & Risk Factors

India VIX: Fluctuated, indicating uncertainty

- Higher VIX = More fear
- Lower VIX = Stable market

Key Risks ⚠️

1. US-China Trade Tensions
2. Geopolitical Risks
3. Inflation Concerns
4. Corporate Earnings – mixed
5. FII Flows
6. Global Economic Slowdown

Part 8: Investor Strategy & Recommendations

Short-term (1–3 months) 📅

- Positive sentiment from festive season
 - Corporate earnings critical
 - Expect FII improvement
- Actions:** Buy quality stocks on dips; focus on banking & financials; strictly follow stop-loss; avoid over-leveraging

Medium-term (3–12 months) 🇮🇳

- Strong GDP growth expected
 - Infrastructure spending rising
 - Benefit from manufacturing push & digital economy expansion
- Strategy:** Continue SIPs; sector rotation (IT, Banking, Infrastructure); quality over quantity; diversify

Long-term (1+ year) 🎯

- India fastest-growing major economy
 - Mega-trends: Digital Transformation, Green Energy, Infrastructure boom, Manufacturing hub, Demographic dividend
- Strategy:** Equity 60–70%, Debt 20–30%, Gold 10% hedge, Regular review, Tax planning

Attractive Sectors 🌟

1. Banking & Financial Services 🏦
2. IT 💻
3. Infrastructure & Construction 🏗️
4. Renewable Energy ☀️
5. Consumer Discretionary 🛍️

Part 9: Next Week (20–24 October)

Key Events 📅

- Mon, 20 Oct: Midwest IPO allotment; some corporate results
- Tue-Wed: Earnings season continues; global economic data
- Thu, 23 Oct: Economic indicators
- Fri, 24 Oct: Midwest IPO listing; weekly market close

Market Holidays & Special Trading:

- Dhanteras (18 Oct, Sat): Market closed, festive gold buying
- Diwali Mahalakshmi Pooja (20 Oct, Mon): Muhurat Trading – 1-hour special session
- 21–24 Oct: Normal trading

Important Notes: Track corporate results, FII-DII flows, global cues, crude oil, rupee movement, upcoming inflation data

Part 10: Key Takeaways

Quick Recap

- Sensex: +1,441 points (82,327 → 83,768)
- Nifty: +389 points (25,227 → 25,616)
- Gold: ₹13,277/gm
- Silver: ₹1,85,000/kg (slight correction)
- LG Electronics IPO: 54x subscription, successful listing
- FII: Reduced selling
- DII: Strong buying continues
- Corporate Results: Mixed, some stellar performers

Market Mood 🗣️:

Despite Mon-Tue decline, markets showed resilience from Wednesday.

- ✓ Strong domestic investor confidence
- ✓ Festive demand supported sentiment
- ✓ Quality companies delivered in earnings
- ✓ FII selling pressure reducing

Investor Message 💬:

“Patience, discipline, and long-term perspective are the keys to successful investing.”

Lessons from weekly volatility:

- 1 Short-term volatility is normal – don’t panic
- 2 Stay invested – time in market matters more than timing
- 3 Continue SIPs – benefit of rupee cost averaging

- 4 Diversify – don't put all eggs in one basket
- 5 Review but don't overreact

Happy Dhanteras & Diwali! 🍁 ✨

Just as buying gold & silver is considered auspicious, investing in quality stocks can multiply your wealth long-term. May this Diwali also bring light to your portfolio! 🌟

Happy Investing and Happy Diwali! 🙏

Disclaimer

⚠️ Important Note:

This report is for informational and educational purposes only. Not investment advice.

- Stock market investments are subject to market risks
 - Consult financial advisor before investing
 - Past performance does not guarantee future results
 - Invest according to your risk capacity
 - Read all related documents carefully
- Mutual fund investments are subject to market risks. Read all scheme-related documents carefully.

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Data Sources: BSE, NSE, MCX, Bloomberg, Reuters, Economic Times, Moneycontrol

Stay tuned for next week's report!