

Weekly Market Report

Kerdoss Trade India, (SEBI Registered Research Analyst)

Week of October 06 – October 10, 2025

IT & Banking Lead Rebound as Global Rate Hopes Grow

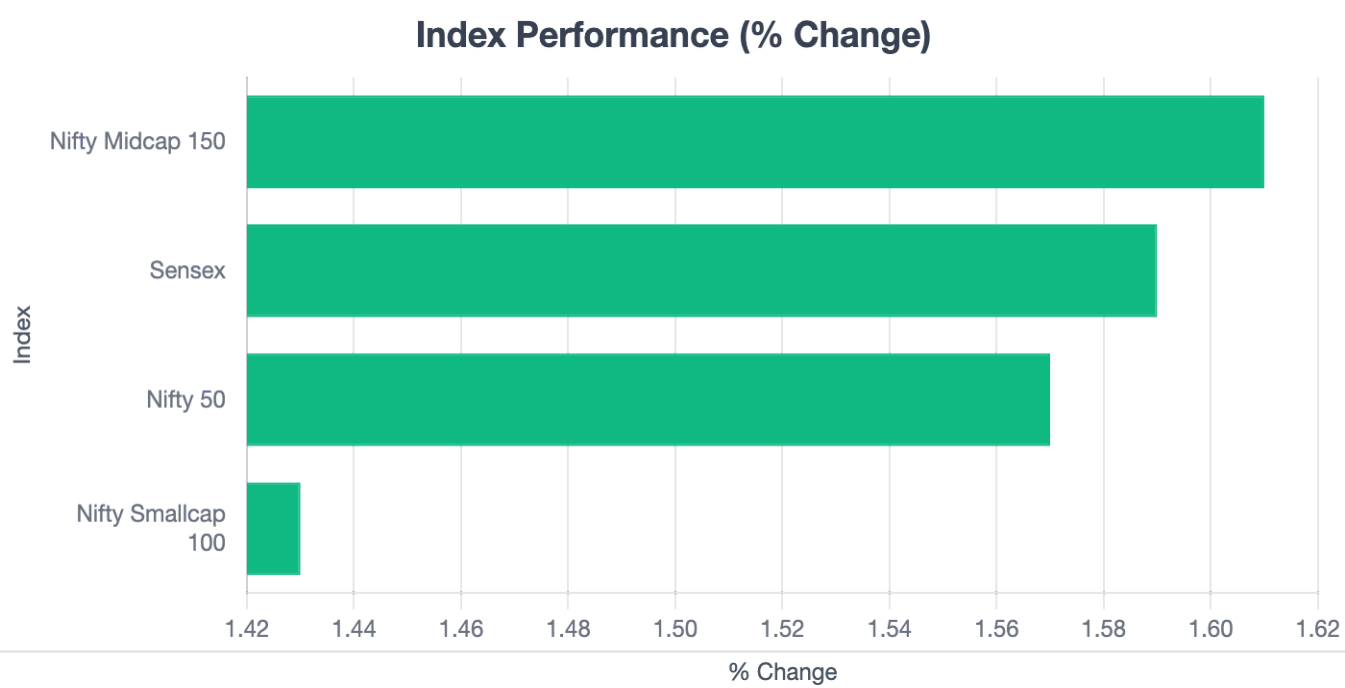
The Indian equity markets executed a decisive rebound in the first full week of October, reversing the prior week's losses with conviction. The benchmark Nifty 50 and BSE Sensex indices surged by 1.57% and 1.59%, respectively, closing the week on a strong footing.

The primary catalyst for this surge was external, with dovish interpretations of U.S. Federal Reserve communications signaling a potential peak in the global interest rate cycle. This forward-looking optimism fueled a significant risk-on sentiment and a sharp rotation of capital into rate-sensitive sectors like IT and Banking.

Key Index Performance (Week-on-Week Analysis)

INDEX	PREVIOUS WEEK CLOSE	10 OCT CLOSE	ABSOLUTE CHANGE	% CHANGE	DIRECTION
Nifty 50	24894.25	25285.35	+391.10	+1.57%	Up
Nifty Midcap 150	21400.30	21743.95	+343.65	+1.61%	Up
Nifty Smallcap 100	17878.15	18133.35	+255.20	+1.43%	Up
BSE Sensex	81207.17	82500.82	+1293.65	+1.59%	Up

Index Performance (% Change)



Domestic Headwinds & Tailwinds

FOMC Minutes & Powell's Speech

Dovish FOMC minutes and cautious commentary from Fed Chair Powell led markets to interpret a peak in the global rate cycle. This directly fueled the spectacular 4.89% surge in the Nifty IT index.

Bharat Telecom 2025

The event highlighted India's ambition to become a global telecom manufacturing hub. The focus is shifting from consumer tariffs to an enterprise-led model, with 5G private networks and domestic manufacturing as key growth drivers.

Global Fintech Festival 2025

The GFF cemented India's position as a global fintech leader. The focus on AI, digital public infrastructure (like ONDC & OCEN), and innovative payment solutions reinforced a positive outlook for the Banking and IT sectors.

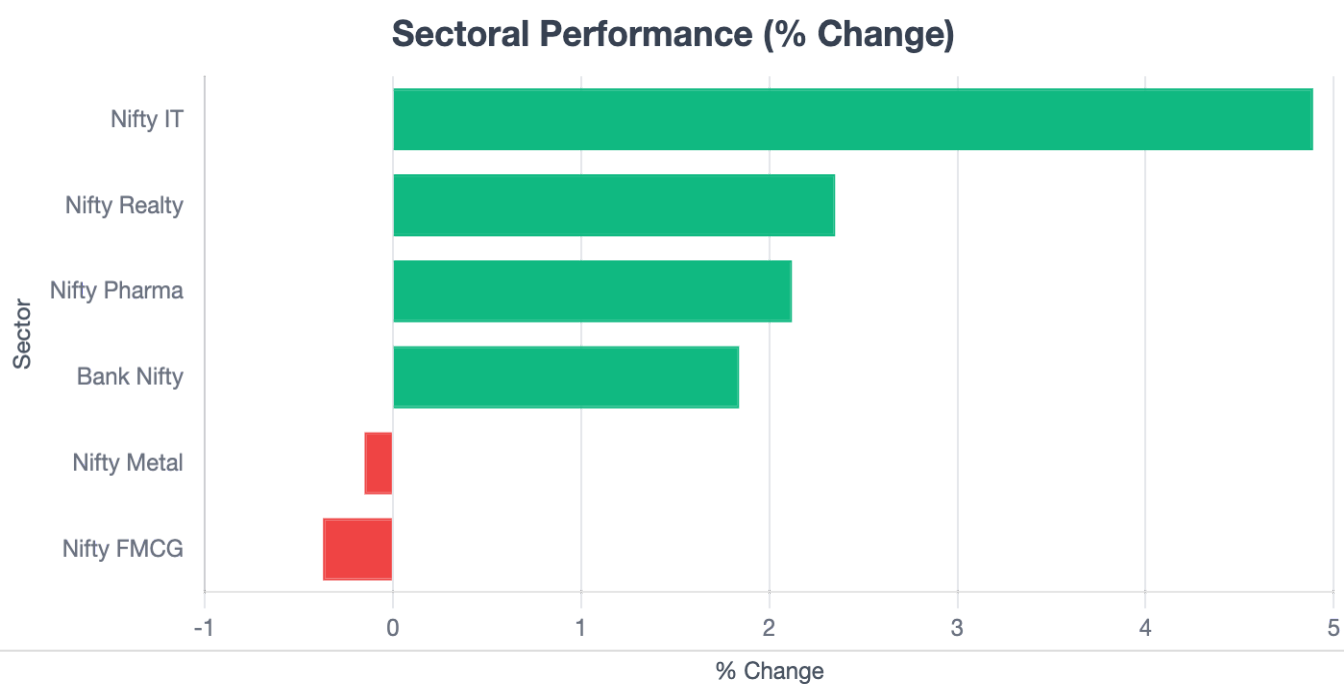
India-EU FTA Negotiations

The 14th round of talks commenced, but significant hurdles remain. Sticking points like auto tariffs and the EU's Carbon Border Adjustment Mechanism (CBAM) created a cloud of uncertainty over the Auto and Metal sectors.

Sectoral Performance Review

SECTOR	WEEKLY % CHANGE	KEY DRIVER
Nifty IT	+4.89%	The week's champion, surging on dovish signals from the U.S. Fed, which overshadowed muted Q2 earnings expectations.
Nifty Realty	+2.35%	Benefited from the growing global consensus that the interest rate hiking cycle is peaking, a direct positive for the sector.
Nifty Pharma	+2.12%	Attracted buying interest due to its defensive characteristics and sector-specific optimism around FTA negotiations.
Bank Nifty	+1.84%	Propelled by innovation buzz from the Global Fintech Festival and robust Q2 credit growth data.
Nifty Metal	-0.15%	Faced headwinds from unresolved issues in the India-EU FTA talks, specifically the EU's carbon tax (CBAM).
Nifty FMCG	-0.37%	The worst performer, weighed down by persistent concerns about muted rural demand and cautious analyst commentary.

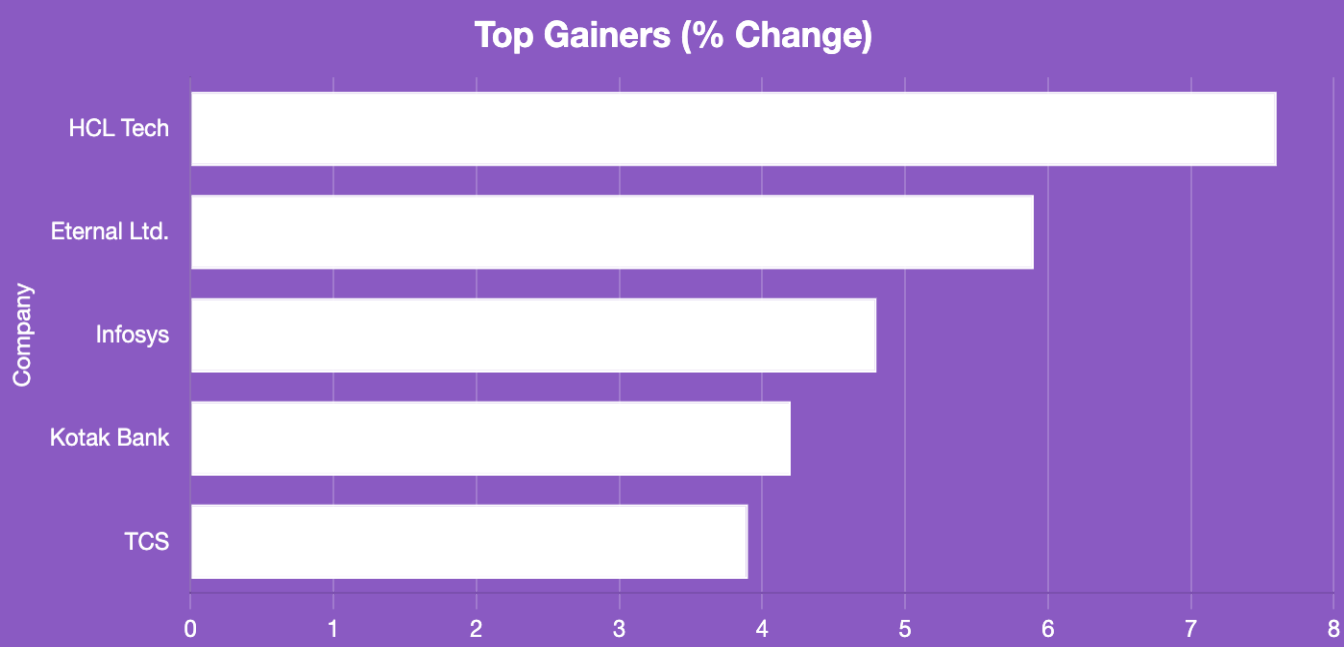
Sectoral Performance (% Change)



Weekly Top Gainers (Large Cap)

COMPANY
HCL Technologies
Eternal Ltd.
Infosys Ltd.
Kotak Mahindra Bank
Tata Consultancy Services

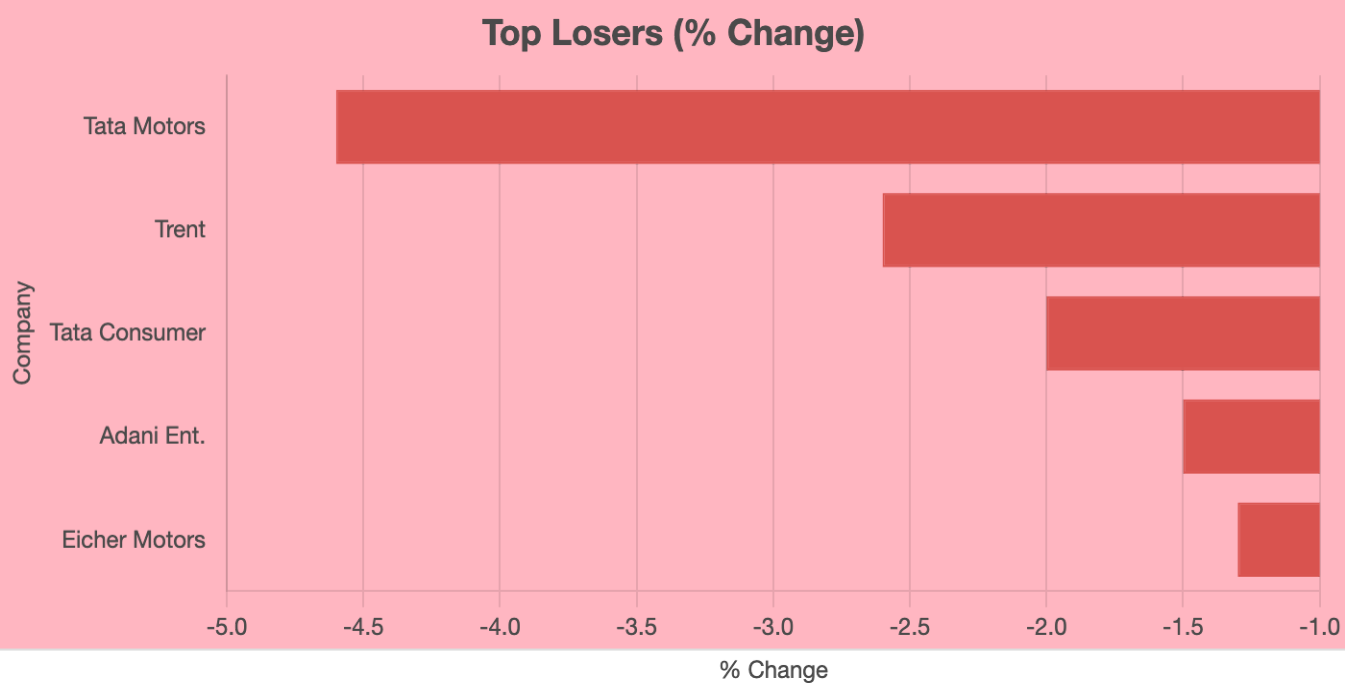
Top Gainers (% Change)



Weekly Top Losers (Large Cap)

COMPANY
Tata Motors Ltd.
Trent Ltd.
Tata Consumer Products Ltd.
Adani Enterprises Ltd.
Eicher Motors Ltd.

Top Losers (% Change)



Outlook for the Coming Week (October 13 - 17, 2025)

The market enters the upcoming week with strong positive momentum, but this will be tested as the focus decisively shifts from global macroeconomic cues to domestic corporate fundamentals. Investors should brace for a period of heightened stock-specific volatility.

- **The Earnings Onslaught:** The Q2 earnings season will gather pace. Management commentary from major IT and Banking companies will be scrutinized to see if it validates the sharp rally seen in these sectors.
- **Domestic Data Watch:** Key data points including CPI (Oct 13), WPI (Oct 14), and Balance of Trade (Oct 15) will provide further clarity on the state of the Indian economy.
- **Global Macro Monitor:** U.S. CPI (Oct 15) and Retail Sales (Oct 16) will be critical. Any signs of persistent inflation could temper the market's dovish interpretation of the Fed's stance.
- **Nifty 50 Technicals:** Immediate support has shifted higher to the 25,000 mark. As long as the Nifty holds above this psychological level, the trend remains positive for a move towards 25,400.

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