

Weekly Market Report

Kerdoss Trade India, (SEBI Registered Research Analyst)

Week of October 13 – October 17, 2025

Bulls Dominate as Festive Cheer and FII Inflows Propel Markets to New Highs

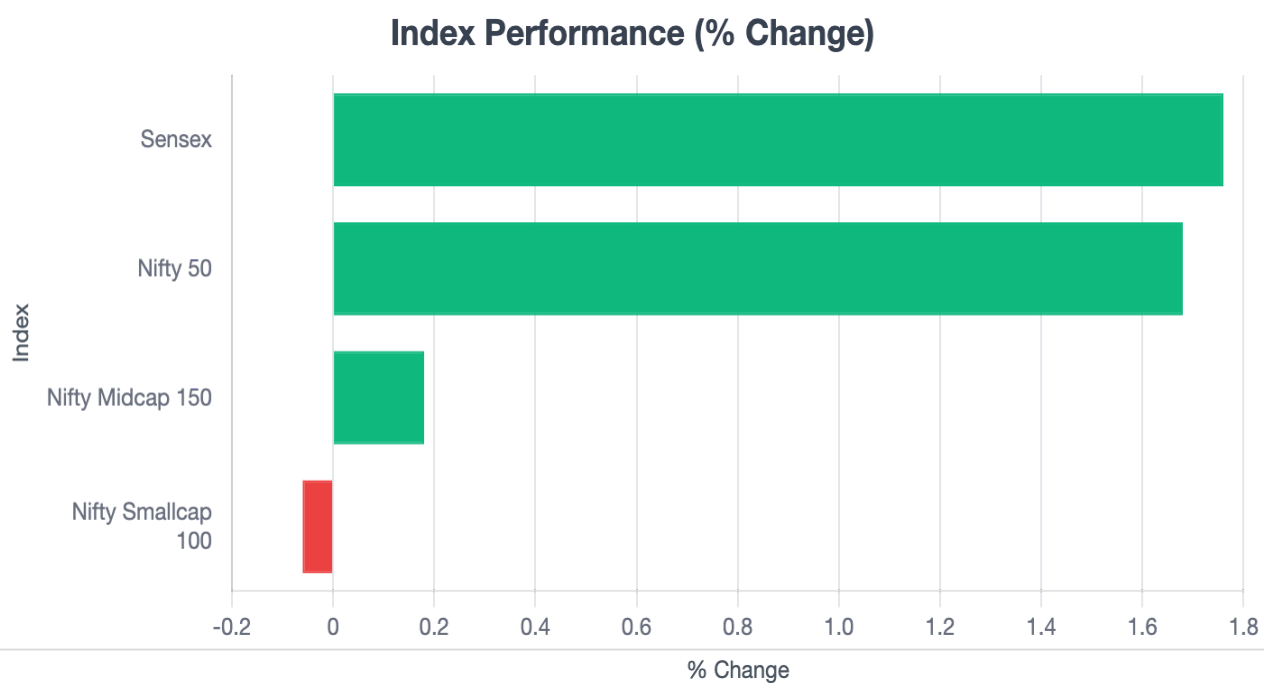
The Indian equity markets showcased formidable strength, with benchmark indices Nifty 50 and Sensex surging to new 52-week highs. This decidedly bullish momentum was fueled by resurgent Foreign Institutional Investor (FII) buying, robust domestic sentiment ahead of the Diwali festive season, and a flurry of positive corporate activity.

The market's ability to rally to new highs, despite global uncertainties like a US government shutdown and record-high gold prices, highlights a potential decoupling driven by India's strong domestic growth narrative. The performance suggests that for the moment, local positive catalysts are outweighing international headwinds.

Key Index Performance (Week-on-Week Analysis)

INDEX	PREVIOUS WEEK CLOSE	17 OCT CLOSE	ABSOLUTE CHANGE	% CHANGE	DIRECTION
Nifty 50	25285.35	25709.85	+424.50	+1.68%	Up
Nifty Midcap 150	21743.95	21782.80	+38.85	+0.18%	Up
Nifty Smallcap 100	18133.35	18122.40	-10.95	-0.06%	Down
BSE Sensex	82500.82	83952.19	+1451.37	+1.76%	Up

Index Performance (% Change)



The Macro-Economic Canvas

Primary Market Frenzy

The successful listings of marquee IPOs like Tata Capital and LG Electronics, coupled with a packed pipeline of new issues, underscored strong retail and institutional investor appetite for fresh equity.

The FII Reversal

After months of being net sellers, FIIs returned with conviction, turning into significant net buyers with purchases of ₹3,289 crore in four sessions. This injected crucial liquidity and confidence into the market.

Decoding the Fed's Dovish Pivot

Explicitly dovish commentary from Fed officials, including Governor Waller, solidified expectations for an October rate cut. This catalyzed the crucial reversal of FII flows back into emerging markets like India.

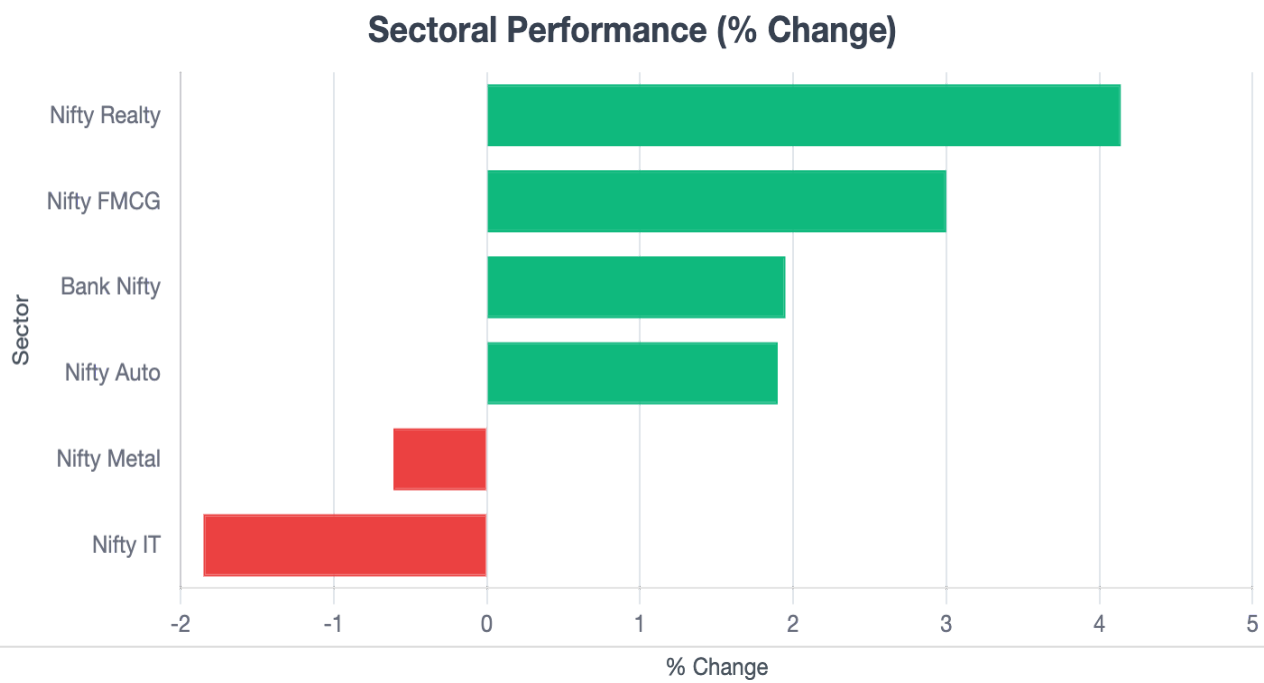
Gold's Record Surge

In a stark reflection of underlying global risks, gold breached the psychological \$4,000 per ounce barrier. This flight to safety served as a clear counterpoint to the risk-on sentiment in equity markets.

Sectoral Performance Review

SECTOR	WEEKLY % CHANGE	KEY DRIVER
Nifty Realty	+4.14%	The standout performer, surging on robust housing demand and overwhelmingly positive sentiment fueled by the festive season.
Nifty FMCG	+3.00%	A massive outperformer, the index rallied strongly on expectations of buoyant rural and urban demand during the festive period.
Bank Nifty	+1.95%	Rallied on strong credit growth expectations and positive sentiment ahead of Q2 earnings from major banks.
Nifty Auto	+1.90%	Delivered a strong performance, driven by widespread expectations of bumper festive season sales.
Nifty Metal	-0.61%	Pressured by concerns about a global economic slowdown and mixed signals from Chinese economic data.
Nifty IT	-1.85%	The worst performer, impacted by escalating global macro concerns and weak Q2 guidance from some IT majors.

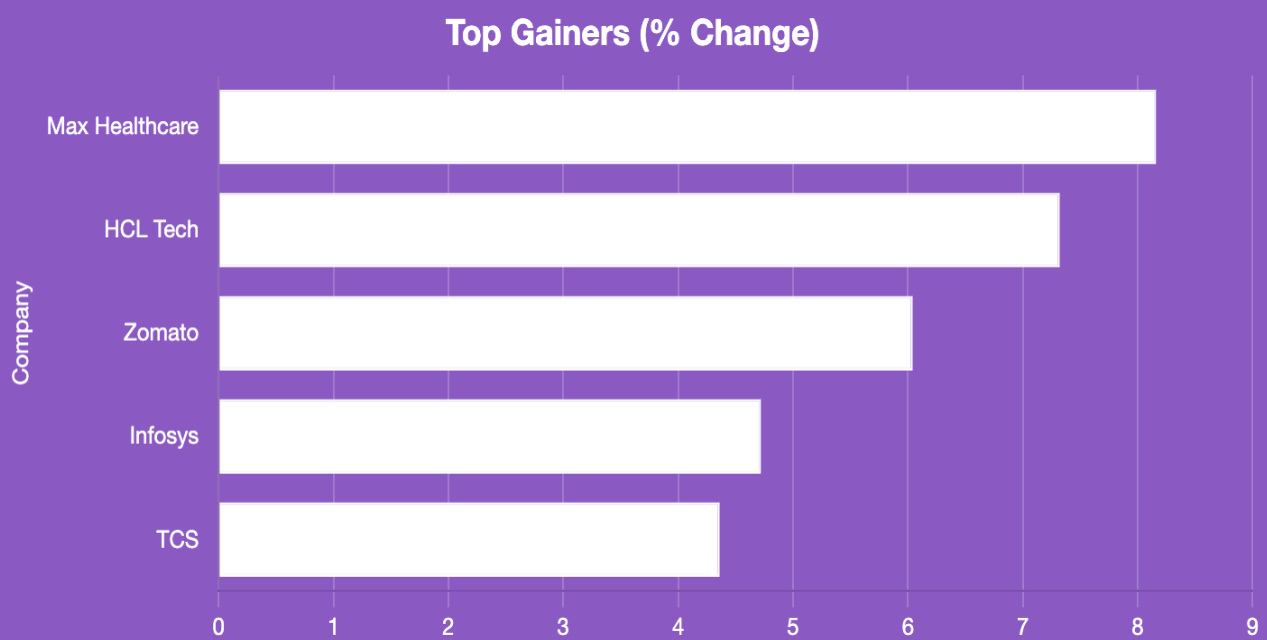
Sectoral Performance (% Change)



Weekly Top Gainers (Large Cap)

COMPANY
Max Healthcare Institute
HCL Technologies
Eternal (Zomato)
Infosys
TCS

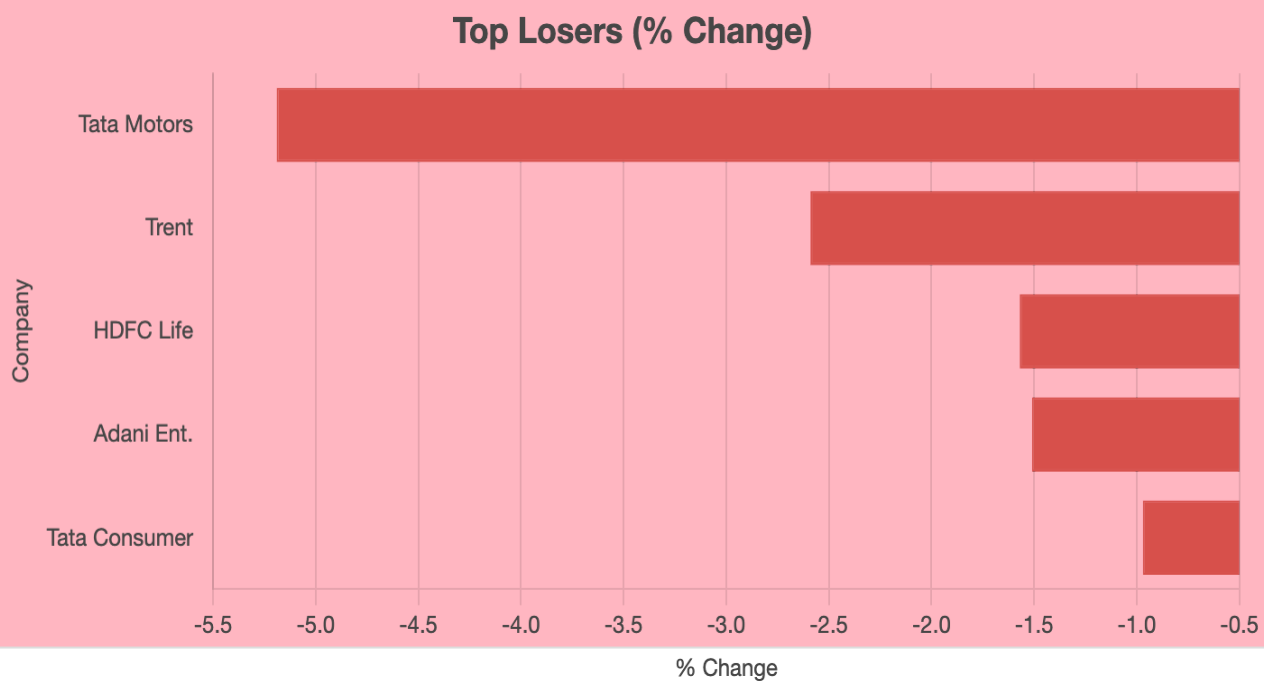
Top Gainers (% Change)



Weekly Top Losers (Large Cap)

COMPANY
Tata Motors
Trent
HDFC Life Insurance
Adani Enterprises
Tata Consumer Products

Top Losers (% Change)



Outlook for the Coming Week (October 20 - 24, 2025)

As we move into the third week of October, the market's trajectory will be heavily influenced by the progression of the Q2 earnings season, a slate of key economic data releases, and the evolving global macroeconomic narrative. While the underlying sentiment remains bullish, investors should remain watchful.

- **The Earnings Gauntlet:** The Q2FY26 earnings season will move into high gear. Key results to watch include Kotak Bank, Axis Bank, IOC, ITC, and Tech Mahindra. Management commentary will be crucial.
- **Domestic Data Dashboard:** Key Indian data points include Infrastructure Output (Oct 21) and the preliminary HSBC Flash Manufacturing & Services PMI for October (Oct 24).
- **Global Cues & FII Flow:** Developments regarding the U.S. government shutdown and further speeches by Fed officials will be scrutinized. The continuation of positive FII inflows is critical for sustaining the rally.

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