

INDIA WEEKLY MARKET SNAPSHOT

20th Oct 2025











Top News

- India's forex reserves fall by \$2.18 billion to \$697.78 billion as of October 10, 2025
- After 3-month withdrawal streak, FPIs pump Rs 6,480 cr into Indian equities in October
- RBI gold reserves cross \$100 billion mark for first time amid price rally
- SEBI Deliberates Phasing Out Weekly Options To Curb Speculative Trading
- GIFT City climbs 3 places in GFCI rankings
- IFSCA makes changes in year old listing norms, still waiting for first one
- SEBI to keep algorithmic trading norms updated to ensure fair play, says SEBI Chief
- RBI MPC: High frequency data show economic growth likely to be strong in Q2, says Guv
- India central bank minutes show room for rate cuts as inflation outlook softens
- Further rate cut today runs the risk of an overdose, says RBI MPC member Ram Singh
- Room for further cut in policy rate, but time not opportune: RBI Governor
- IMF projects India to grow 6.6% in 2025, cuts projection for next year

Regulatory Notifications

- SEBI's Revises Disclosure Framework for Related Party Transactions
- SEBI extends deadline to Jan 2026 for angel funds to disclose allocation
- SEBI issues master circular for issue and listing of Non-convertible Securities, Securitised Debt Instruments, Security Receipts, Municipal Debt Securities and Commercial Paper

FPI Assets Under Custody (AUC): Equity Aug 25

Top 10 Countries		(USD Bn)
		347.3
		59.6
		53.4
		49.3
		38.0
		35.3
		31.0
		24.5
		19.4
		17.3

Domestic Sectoral Indices

Indices	17 Oct 25	1 Week Change
Bank Nifty	57,713	1.95% ▲
Fin Nifty	27,539	2.59% ▲
Nifty Pharma	22,254	0.16% ▲
Nifty FMCG	56,616	3.00% ▲
Nifty IT	34,951	-1.85% ▼
Nifty Metal	10,199	-0.61% ▼
Nifty O&G	11,498	0.27% ▲
Nifty Realty	934	4.14% ▲

Key Economic Indicators

Indicator	Value	Date
Inflation	1.54%	(Sept. 25) ▼
FII Inflows	USD 2.32 Bn	(July 25) ▼
Forex Reserves	USD 697.8 Bn	(10 Oct 25) ▼
INR USD Rate	INR 87.91	(17 Oct 25) ▼
GDP Rate	7.8%	(Q1 25-26) ▲
IIP Growth	4.0%	(August 25) ▲
Crude Oil/WTI (USD/Bbl.)	USD 57.54	(17 Oct 25) ▼
Gold (USD/t.oz)	USD 4,250.2	(17 Oct 25) ▲

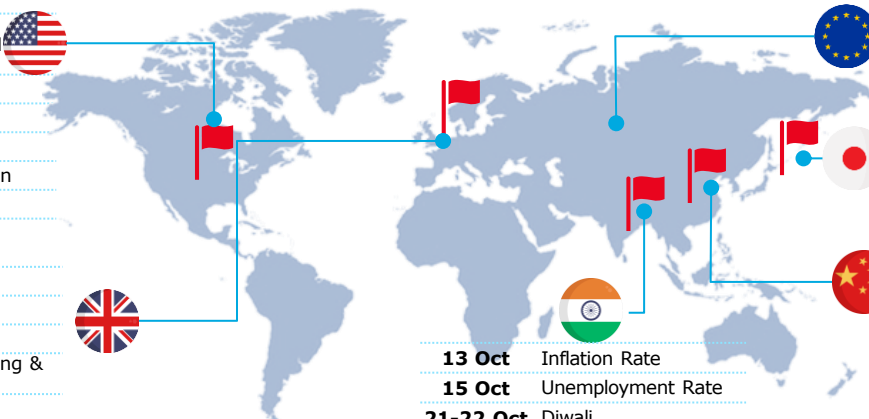
Broad Market Indices

Indices	Bloomberg Symbol	17 Oct 25	1 Week Change
Domestic Indices			
BSE Sensex	SENSEX:IND	83,952	1.76% ▲
Nifty 50	NIFTY:IND	25,710	1.68% ▲
Foreign Indices			
Dow Jones	INDU:IND	46,191	1.56% ▲
Nasdaq	CCMP:IND	22,680	2.14% ▲
Hang Seng	HSI:IND	25,247	-3.97% ▼
DAX	DAX:IND	23,831	-1.69% ▼
Nikkei	NKY:IND	47,582	-1.05% ▼

Major Economic Events and Holidays (October 2025)

- 01 Oct** Manufacturing PMI Rate
- 03 Oct** Non Farm Payrolls, Unemployment rate, ISM Services PMI
- 13 Oct** Columbus Day
- 15 Oct** Inflation Rate
- 16 Oct** PPI, Retail Sales
- 29 Oct** Fed Interest Rate Decision
- 30 Oct** GDP Growth Rate

- 14 Oct** Unemployment Rate
- 16 Oct** GDP Growth Rate
- 22 Oct** Inflation Rate
- 24 Oct** Retail Sales, Manufacturing & Services PMI



- 01 Oct** Inflation Rate
- 30 Oct** GDP Growth rate, ECB Interest Rate Decision, Inflation - Germany
- 30 Oct** Inflation - France, Italy

- 13 Oct** Health and Sports Day
- 22 Oct** Balance of Trade
- 24 Oct** Inflation rate
- 30 Oct** BoJ Interest Rate Decision

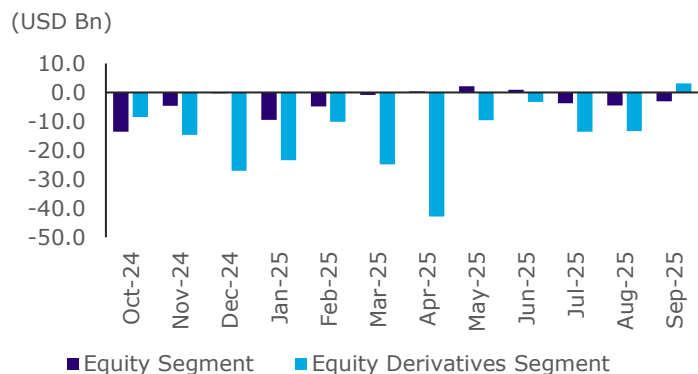
- 01-08 Oct** National Day Golden Week
- 13 Oct** Balance of Trade, Exports, Imports
- 15 Oct** Inflation Rate
- 20 Oct** GDP Growth Rate, Industrial Production, Retail Sales
- 31 Oct** Manufacturing PMI



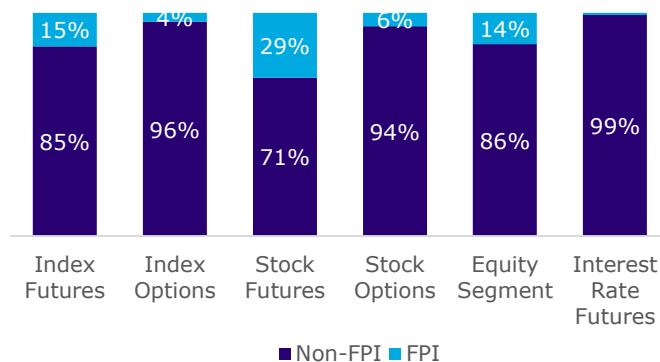
BRIEF OVERVIEW: MARKET STATISTICS (I)



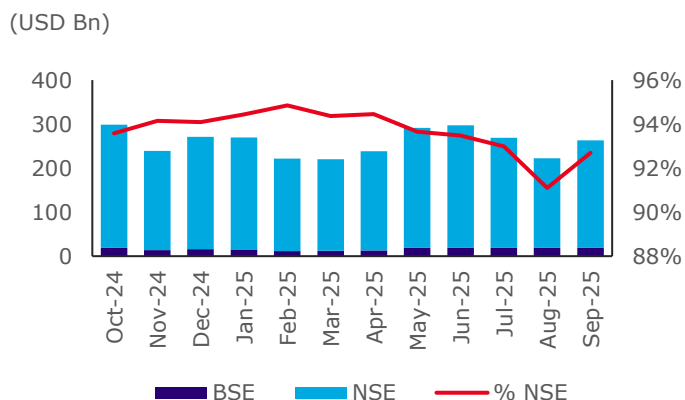
FPI Net Investment Flows



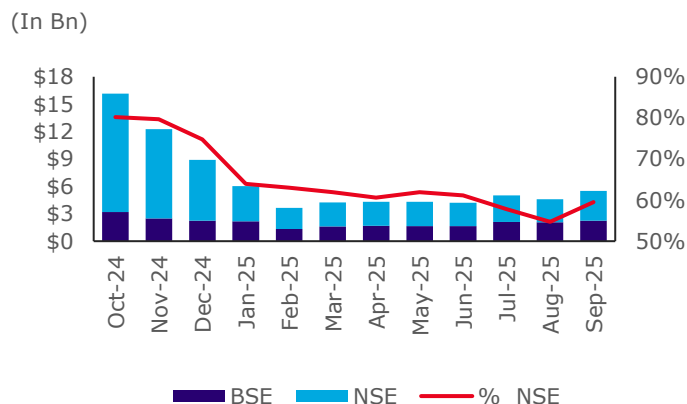
FPI Share v/s Other Client Category



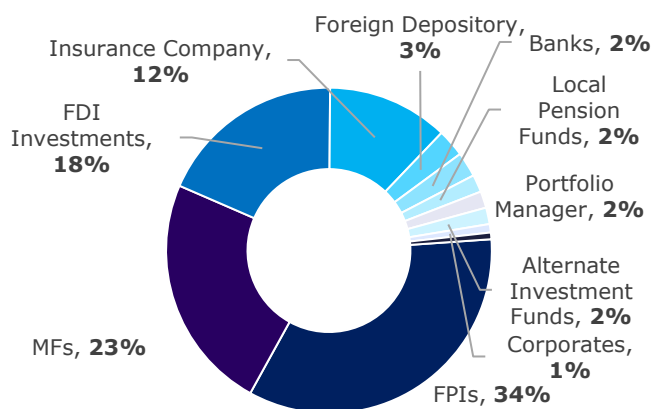
Equity Turnover



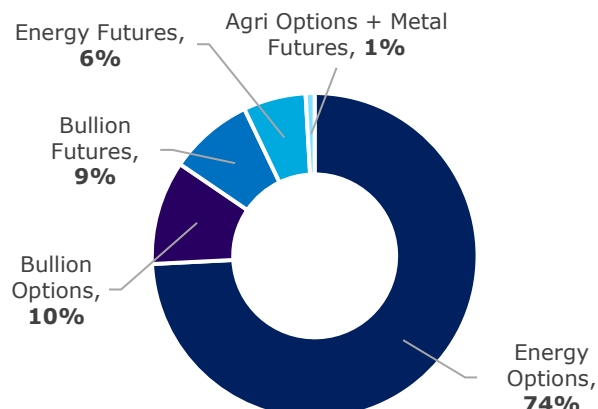
Equity Derivatives – Contracts Traded



AUC Basis Client Category



Commodity Derivatives

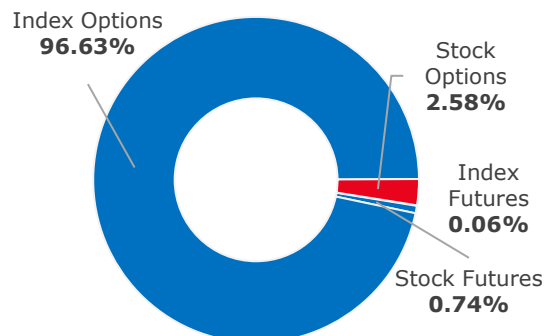




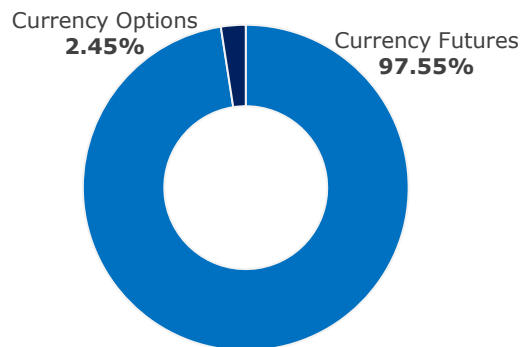
BRIEF OVERVIEW: MARKET STATISTICS (II)



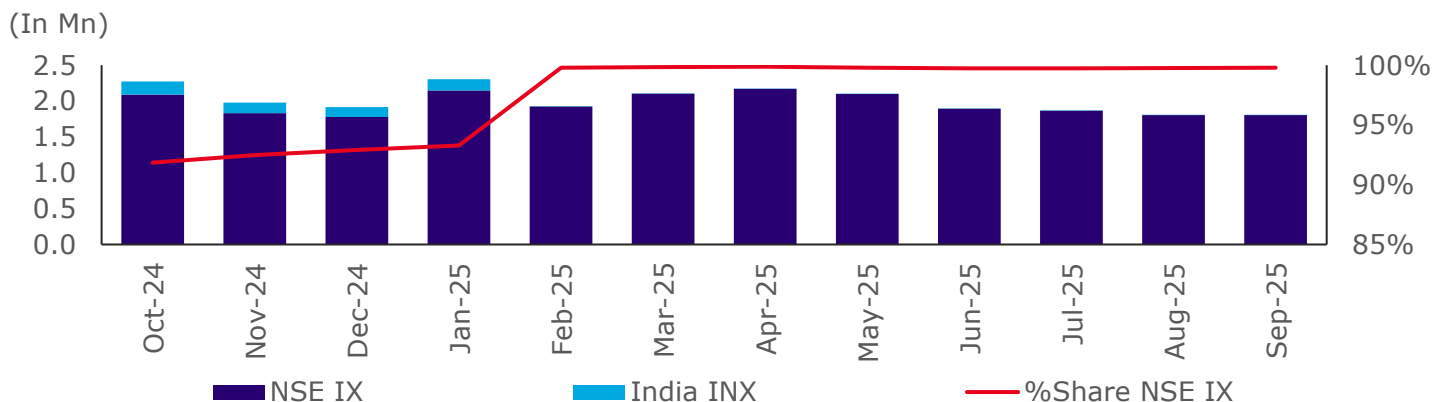
Equity Derivatives Breakdown



FX Derivatives Breakdown



GIFT City Turnover – Contracts Traded



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