



HSBC Mutual Fund

# Market Flash

October 13, 2025





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### Sensex down 200 points, Realty cracks; India VIX zooms 12%

Indian stock markets were trading gap-down on Monday amid broad-based selling. The drawdown in Indian markets follows selling in Asian markets after US President on Friday night, warned of "restrictor" tariffs on China. Though his stance softened on Beijing by Sunday, investors remain wary of any new trade war between the two countries.

At 9:50 AM, the frontline BSE Sensex was trading at 82,229 down 207 points or 0.25%. Market breadth is negative with and out of a total of 1,347 shares traded on the Bombay Stock Exchange, 2,148 advanced while 1,625 declined and 191 remained unchanged. The broader Nifty50 was at 25,231 levels down 55 points or 0.22%.

In the broader markets, the Nifty Mid Cap index and the Nifty SmallCap index declined 0.57% and 0.65%, respectively. Volatility gauge, India VIX, zoomed 12%.

All the sectoral indices were in the red. The Nifty Realty index declined the most, losing over 1%, followed by the Nifty Metal index and the Nifty IT index (down 0.8% each).

### WEEKLY REVIEW – OCT 6, 2025 – OCT 10, 2025

Domestic equity benchmarks ended the week on a strong note, buoyed by upbeat corporate updates and growing optimism ahead of the Q2 earnings season. Also, IT and bank stocks witnessed gains as buoyant sentiment ahead of the earnings season drew in foreign investors. Positive global cues and improved investor sentiment also supported the rally. The broader market participated in the uptrend, with mid-cap indices registering gains, while small-caps remained largely flat.

In the week ended on Friday, 10 October 2025, the BSE Sensex surged 1,293.65 points or 1.59% to settle at 82,500.82. The Nifty 50 index jumped 391.1 points or 1.57% to settle at 25,285.35. The BSE Mid Cap index added 1.49% to close at 46,362.29. The BSE Small Cap index was flat end at 53,378.57.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>Domestic</b>				
S&P BSE Sensex	82,500.82	0.4	1.32	5.58
Nifty 50	25,285.35	0.41	1.25	6.94
S&P BSE 200	11,469.36	0.39	1.23	4.92
S&P BSE 500	36,630.27	0.39	1.09	4.1
S&P BSE Midcap	46,362.29	0.36	0.61	-0.18
S&P BSE Smallcap	53,378.57	0.59	-0.05	-3.27
S&P BSE Auto	59,626.26	0.49	-0.47	15.41
S&P BSE Bankex	63,872.58	0.97	4.71	10.62
S&P BSE Cap Goods	69,552.59	0.47	1.74	2.62
S&P BSE Consumer Durables	59,578.37	0.71	-3.57	-7.54
S&P BSE FMCG	20,231.32	0.48	-3.21	-2.6
S&P BSE Healthcare	44,688.17	0.99	0.03	-1.3
S&P BSE IT	34,985.28	0	-1.64	-18.99
S&P BSE Metal	33,990.56	-0.86	4.89	17.65
S&P BSE Oil & Gas	27,363.00	-0.13	5.51	4.98
S&P BSE Power	6,796.13	0.7	3.11	-2.43
S&P BSE Realty	6,965.31	1.72	1.41	-15.41

**Data as of 09 October 2025**

## GLOBAL MARKETS

Asian stocks got off to a rocky start on Monday after fresh broadsides in the U.S.-China trade war spooked markets with already stretched valuations, though there were signs risk sentiment had steadied with Wall Street futures bouncing.

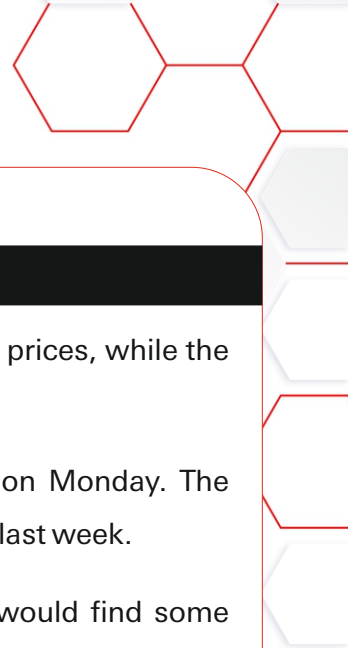
A holiday in Japan and the United States made for choppy early trading and political uncertainty still shrouded Japanese and European assets.

While US President had threatened 100% tariffs on China from November 1, he sounded more conciliatory over the weekend, posting that everything would be fine and the US didn't want to "hurt" China.

The Nikkei was closed on Monday. Futures were trading up 1.3% at 46,690 but that was still far below the cash close of 48,088.

Shares in South Korea slid 2.1%, while Australia lost 0.5%. MSCI's broadest index of Asia-Pacific shares outside Japan dropped 0.6%.

Wall Street was trying to make a comeback with S&P 500 futures rallying 1.1%, while Nasdaq futures jumped 1.6%.



## RUPEE, OIL, GOLD & FIIs

**Indian Rupee:** The Indian Rupee weakened on Monday amid an uptick in crude oil prices, while the dollar softened after US-China tensions eased.

The domestic currency opened six paise lower at 88.75 against the greenback on Monday. The currency has fallen 3.67 per cent so far this year, while it also closed at a low of 88.79 last week.

**Crude Oil:** Oil prices also regained some ground on hopes the U.S. and China would find some compromise on trade to avoid fresh tariffs.

Brent bounced 1.0% to \$63.36 a barrel, while U.S. crude rose 1.0% to \$59.45 per barrel.

**FPIs & DIIs:** The focus will also be on the mood of institutional investors, as FIIs and DIIs both supported the market last week. Easing valuation concerns and improving earnings and growth prospects may be some of the reasons for renewed FIIs buying interest in the passing week.

FIIs have turned net buyers in Indian equities after several weeks, purchasing Rs 2,975.53 crore worth of shares during the week, while DIIs have made Rs 8,391.11 crore worth of buying in the same period.

**Gold & Silver:** Gold remained in high demand as a hedge against fiscal and political uncertainty, rising 0.5% to \$4,037 an ounce and pipping last week's record to touch \$4,059.

Gold and silver prices on Monday continued their upward momentum across India after a record rally triggered by macroeconomic uncertainty and festival demand push. In Mumbai, the price of 24-carat gold stood at Rs 1,25,400 per 10 grams, while 22k gold was available at Rs 1,14,950 per 10 grams.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>International</b>				
DJIA*	46,358.42	-0.52	1.42	8.97
Nasdaq Composite*	23,024.62	-0.08	5.23	19.23
Nikkei 225 (Japan)	48,088.80	-1.01	9.7	20.54
Straits Times (Singapore)	4,427.06	-0.3	1.85	16.88
Hang Seng (Hong Kong)	26,290.32	-1.73	0.34	31.06
Kospi Composite (Seoul)	3,610.60	1.73	8.93	50.47
FTSE 100 (London)	9,509.40	-0.41	2.89	16.35
Cac 40 (France)*	8,041.36	-0.23	3.77	8.95
Xetra Dax (Germany)*	24,611.25	0.06	3.76	23.62
S&P 500 (US)*	6,735.11	-0.28	3.42	14.51
Shanghai (china)	3,897.03	-0.94	2.22	16.27
MICEX (Russia)*	2,614.73	-0.9	-10.28	-9.31
Bovespa (Brazil)*	1,41,708.00	-0.31	0.06	17.81
JCI (Indonesia)	8,257.86	0.08	7.26	16.64
SET (Thailand)	1,286.98	-2.06	0.7	0.8

**Data as of 06 September 2025, \*Data as of 09 October 2025**

#### FII equity investments, Rs cr

	Buy	Sell	Net	MTD
09-Oct	12,396.00	9,990.00	2,406.00	1,935.00
Sep-25	3,08,483.67	3,27,411.56	-18,927.89	
Aug-25	2,83,963.33	3,21,786.37	-37,823.04	
Jul-25	3,12,648.33	3,37,371.81	-24,723.48	
Jun-25	3,71,204.75	3,50,781.11	20,423.64	
May-25	3,61,096.18	3,46,413.08	14,683.10	
Apr-25	3,18,326.36	3,13,929.66	4,396.70	
Last Close	10,950.00	10,212.00	738	
6 Months average	3,25,953.77	3,32,948.93	-6,995.16	

**-FII data as of 06 October 2025**

#### MF equity investments, Rs cr

	Buy	Sell	Net	MTD
01-Oct	8,243.00	8,973.00	-730	4,489.00*
Sep-25	219673.44	175091.24	44582.2	
Aug-25	222120.6	151586.21	70534.39	
Jul-25	254723.57	207704.75	47018.82	
Jun-25	257946.08	214007.74	43938.34	
May-25	233615	177312.92	56302.08	
Apr-25	212481.74	195438.37	17043.37	
Last Close	11,478.00	8,120.00	3,358.00	
6 Months average	2,33,426.74	1,86,856.87	46,569.87	

**-MF data as of 08 October 2025**

## Week Ahead

The domestic stock market enters next week with a cautiously optimistic tone. Attention will turn to the Q2 earnings season.

Globally, investors will focus on US inflation data, Federal Reserve commentary, and crude oil price movements. Any volatility in these factors could influence domestic equities.

The recent pick-up in foreign institutional investor (FII) inflows and steady domestic participation support a bullish undertone, though fluctuations in US yields or commodities could trigger short-term corrections.

### Domestic Cues:

On Monday, October 13, 2025, the government will release Consumer Price Inflation (CPI) data for September, a key gauge of retail price pressures.

This will be followed by Wholesale Price Index (WPI) Food Inflation data on Tuesday, October 14, 2025.

On Wednesday, October 15, 2025, attention will shift to the Unemployment Rate for September.

### Global Cues:

On Monday, October 13, 2025, China releases its September trade data, including Balance of Trade, Exports YoY, and Imports YoY figures.

On Tuesday, October 14, attention will turn to the United States, where Federal Reserve Chair is scheduled to speak.

A heavy data day follows on Wednesday, October 15, featuring China's Inflation Rate (YoY) and a string of US inflation indicators, including Core Inflation Rate (MoM and YoY) and Headline Inflation Rate (MoM and YoY) for September.

On Thursday, October 16, the US will release Producer Price Index (PPI MoM) and Retail Sales MoM data.

The week closes with the US Building Permits (Preliminary) and Housing Starts data on Friday, October 17.

**Source:** Bloomberg, Capital Market, MOSL & HSBC MF estimates as on October 13, 2025 or as latest available.

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