



HSBC Mutual Fund

# Market Flash

October 06, 2025





## Market Flash

October 06, 2025

### Sensex gains 200 points amid volatility; Banks & IT lead

Indian benchmark indices opened flat with a positive bias on Monday, October 6, aided by a rally in bank and information technology (IT) stocks.

Rupee opens 4 paise stronger on Monday, October 6. The domestic currency opened at 88.73/\$ vs Friday's close of 88.77/\$. India VIX cooled off from morning highs by 2.21%, at 10.06.

At 9:50 AM, the frontline BSE Sensex was trading at 81,411 up 205 points or 0.25%. Market breadth is positive with and out of a total of 3,642 shares traded on the Bombay Stock Exchange, 1,826 advanced while 1,625 declined and 191 remained unchanged. The broader Nifty50 was at 24,953 levels up 58 points or 0.23%.

In the broader markets, the Nifty Mid Cap and the Nifty Small Cap index rose 0.11% and 0.08%.

Among sectors, the Nifty Bank index gained 0.55%, the Nifty Private Bank index 0.6%, and the Nifty PSU Bank, and the Nifty Financial Services indices 0.4% each. The Nifty Pharma index, and the Nifty FMCG index, however, were the top losers, down 0.6% and 0.4%, respectively.

### WEEKLY REVIEW – SEPT 29, 2025 – OCT 3, 2025

The key equity benchmarks ended the truncated week with substantial gains, snapping a six-session losing streak. The rally was supported by the Reserve Bank of India's Monetary Policy Committee, which kept the repo rate unchanged at 5.5%. The central bank lowered its FY26 inflation forecast and raised its GDP growth projection. Broader market outperformed the frontline indices.

Amongst sector-wise indices, Nifty metal emerged as a top performer, rising by 1.82%. Other sectors that performed well were Nifty Consumer Durables and Nifty PSU Bank, rising by more than a percent each. Nifty Auto, Nifty Realty and Nifty Healthcare declined marginally, as investors booked profits after these sectors clocked gains in the week.

Investors will monitor upcoming IPOs, Brent crude oil prices, key economic data and global market cues. Additionally, the earnings season will gain attention with an IT stock set to kick off the cycle, announcing its results on 9th October 2025.

In the week ended on Friday, 3 October 2025, the BSE Sensex advanced 780.71 points or 0.97% to settle at 81,207.17. The Nifty 50 index added 239.55 points or 0.97% to settle at 24,894.25. The BSE Mid Cap index jumped 2.08% to close at 45,678.11. The BSE Small Cap surged 2.09% to end at 53,374.98.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>Domestic</b>				
S&P BSE Sensex	81,207.17	0.28	0.79	3.93
Nifty 50	24,894.25	0.23	0.73	5.28
S&P BSE 200	11,310.04	0.35	0.78	3.47
S&P BSE 500	36,164.94	0.42	0.72	2.77
S&P BSE Midcap	45,678.11	0.78	-0.22	-1.65
S&P BSE Smallcap	53,374.98	1.09	0.66	-3.27
S&P BSE Auto	59,711.52	0.03	3.43	15.58
S&P BSE Bankex	62,741.11	0.54	3.79	8.66
S&P BSE Cap Goods	69,458.21	1.02	3.04	2.48
S&P BSE Consumer Durables	58,648.74	1.15	-5.89	-8.98
S&P BSE FMCG	20,299.40	0.24	-3.02	-2.27
S&P BSE Healthcare	43,523.83	-0.09	-1.64	-3.87
S&P BSE IT	33,548.43	0.26	-3.54	-22.32
S&P BSE Metal	34,048.62	1.85	5.94	17.85
S&P BSE Oil & Gas	27,093.84	0.55	3.66	3.95
S&P BSE Power	6,808.56	0.66	3.03	-2.26
S&P BSE Realty	6,809.07	-0.09	-1.46	-17.31

**Data as of 06 October 2025**

## GLOBAL MARKETS

Asian markets traded higher, with Japanese markets hitting record highs.

Japan's Nikkei 225 index jumped 4.06%, surging past the 47,000 level for the first time, while the Topix rose over 3% to hit an all-time high. Hong Kong's Hang Seng Index futures indicated a slightly higher open. Chinese and South Korean markets were closed for holidays.

US stock market ended mixed on Friday, with the Dow Jones and S&P 500 registering record closing highs and the Nasdaq closing lower.

The Dow Jones Industrial Average rallied 238.56 points, or 0.51%, to 46,758.28, while the S&P 500 rose 0.44 points, or 0.01%, to 6,715.79. The Nasdaq Composite closed 63.54 points, or 0.28%, lower at 22,780.51. For the week, the Dow gained 1.1%, the S&P 500 also climbed 1.1% and the Nasdaq rose 1.3%.



## RUPEE, OIL, GOLD & FIIs

**Indian Rupee:** The rupee closed at 88.77 against the U.S. dollar on Friday, marginally down week-on-week after hitting a record low of 88.80 on Tuesday. The dollar ended the week lower by nearly 0.5% against a basket of peers.

**Crude Oil:** Oil prices rose after OPEC+ announced on Sunday it would increase production by 137,000 barrels per day (bpd) from November, the same modest monthly increase as in October, amid persistent concerns over a looming supply glut. Brent crude futures rose 1.3% to \$65.39 a barrel, while US West Texas Intermediate crude was at \$61.71, up by 1.4%.

**FPIs & DIIs:** Provisional data available with NSE suggest that FPIs turned net sellers of domestic stocks to the tune of Rs 1,583.37 crore on Friday. On the other hand, domestic institutional investors (DIIs) turned buyers of Indian equities to the tune of Rs 489.76 crore on a net-net basis. Foreign investors pulled Rs 23,885 crore out of Indian equities in September 2025.

**Gold & Silver:** Gold prices surged past \$3,900 an ounce for the first time, driven by safe-haven demand. Spot gold price rose 0.4% to \$3,900.40 per ounce after hitting an all-time high of \$3,919.59 earlier in the session. US gold futures for December delivery gained 0.5% to \$3,926.80.

Silver beat other asset classes in 2025 to become a top-runner in returns. Starting the year at just \$28.92 per ounce, Silver has skyrocketed to over \$46 per ounce by late September, giving a return of nearly 61%.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>International</b>				
DJIA*	46,519.72	0.17	2.7	9.34
Nasdaq Composite*	22,844.05	0.39	7.35	18.3
Nikkei 225 (Japan)	45,769.50	1.85	9.13	14.73
Straits Times (Singapore)	4,411.95	0.38	2.86	16.48
Hang Seng (Hong Kong)	27,140.92	-0.54	7.09	35.3
Kospi Composite (Seoul)	Closed	NA	NA	0
FTSE 100 (London)	9,427.73	-0.2	3.41	15.35
Cac 40 (France)*	8,056.63	1.13	5.26	9.16
Xetra Dax (Germany)*	24,422.56	1.28	3.98	22.67
S&P 500 (US)*	6,715.35	0.06	4.67	14.18
Shanghai (china)	Closed	NA	NA	0
MICEX (Russia)*	2,619.70	-0.47	-9.26	-9.13
Bovespa (Brazil)*	1,43,949.64	-1.08	2.58	19.68
JCI (Indonesia)	8,118.30	0.59	2.95	14.67
SET (Thailand)	1,293.61	0.41	2.72	-7.61

**Data as of 29 September 2025, \*Data as of 06 October 2025**

#### FII equity investments, Rs cr

	Buy	Sell	Net	MTD
01-Oct	14,431.00	14,247.00	184	184
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	18,707.00	22,733.00	-4,026.00	
6 Months average	3,25,953.77	3,32,948.93	-6,995.16	

**-FII data as of 29 September 2025**

#### MF equity investments, Rs cr

	Buy	Sell	Net	MTD
01-Oct	33,998.00	30,778.00	3,220.00	44,582.00*
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	33,998.00	30,778.00	3,220.00	
6 Months average	2,33,426.74	1,86,856.87	46,569.87	

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

## Week Ahead

Indian equities enter the next trading week on a cautiously optimistic note. The volatility, however, could remain elevated in the near term.

This week, investors will watch out for key stock market triggers, including the developments over US government shutdown, US FOMC meeting minutes, updates in the Israel-Hamas war, Q2 results, IPO activity, gold prices, trends in flow of foreign funds, and other key domestic and global macroeconomic data.

On Friday, the Indian stock market ended higher, led by fag-end buying, amid recovery in metal and banking stocks.

On the domestic front, the HSBC Services PMI Final for September 2025 would be released on Monday (06 October 2025).

The HSBC Composite PMI Final figure would be made public on the same day.

The bank loan growth data for the week ended on 26 September 2025 would be unveiled on Friday (10 October 2025).

On the same day, the Foreign Exchange Reserves figures for the week ended on 03 October 2025 would be made public.

## Global Cues:

In China, the Foreign Exchange Reserves data for the month of September 2025 would be announced on Thursday (09 October 2025).

In the United States, the Balance of Trade figures for August 2025 would be made public on Tuesday (07 October 2025).

The American Petroleum Institute (API) would release the Crude Oil Stock data for the week ended on 03 October 2025 on Wednesday (08 October 2025).

On Thursday (09 October 2025), the FOMC Minutes would be made public.

The preliminary values for the Michigan Consumer Sentiment for October 2025 would be announced on Friday (10 October 2025).

**Source:** Bloomberg, Capital Market, MOSL & HSBC MF estimates as on October 6, 2025 or as latest available.

**Disclaimer:** This document has been prepared by HSBC Asset Management (India) Private Limited (HSBC) for information purposes only and should not be construed as i) an offer or recommendation to buy or sell securities, commodities, currencies or other investments referred to herein; or ii) an offer to sell or a solicitation or an offer for purchase of any of the funds of HSBC Mutual Fund; or iii) an investment research or investment advice. It does not have regard to specific investment objectives, financial situation and the particular needs of any specific person who may receive this document. Investors should seek personal and independent advice regarding the appropriateness of investing in any of the funds, securities, other investment or investment strategies that may have been discussed or referred herein and should understand that the views regarding future prospects may or may not be realized. In no event shall HSBC Mutual Fund/HSBC Asset management (India) Private Limited and / or its affiliates or any of their directors, trustees, officers and employees be liable for any direct, indirect, special, incidental or consequential damages arising out of the use of information / opinion herein. This document is intended only for those who access it from within India and approved for distribution in Indian jurisdiction only. Distribution of this document to anyone (including investors, prospective investors or distributors) who are located outside India or foreign nationals residing in India, is strictly prohibited. Neither this document nor the units of HSBC Mutual Fund have been registered under Securities law/Regulations in any foreign jurisdiction. The distribution of this document in certain jurisdictions may be unlawful or restricted or totally prohibited and accordingly, persons who come into possession of this document are required to inform themselves about, and to observe, any such restrictions. If any person chooses to access this document from a jurisdiction other than India, then such person do so at his/her own risk and HSBC and its group companies will not be liable for any breach of local law or regulation that such person commits as a result of doing so.

Investors are requested to note that as per SEBI (Mutual Funds) Regulations, 1996 and guidelines issued thereunder, HSBC AMC, its employees and/or empaneled distributors/agents are forbidden from guaranteeing/promising/assuring/predicting any returns or future performances of the schemes of HSBC Mutual Fund. Hence please do not rely upon any such statements/commitments. If you come across any such practices, please register a complaint via email at investor.line@mutualfunds.hsbc.co.in.

The above information is for illustrative purposes only. The sector(s) mentioned in this document do not constitute any research report nor it should be considered as an investment research, investment recommendation or advice to any reader of this content to buy or sell any stocks / investments.

Document intended for distribution in Indian jurisdiction only and not for outside India or to NRIs. HSBC MF will not be liable for any breach if accessed by anyone outside India. For more details, [click here / refer website](#).

© Copyright. HSBC Asset Management (India) Private Limited 2025, ALL RIGHTS RESERVED.

HSBC Mutual Fund, 9-11th Floor, NESCO - IT Park Bldg. 3, Nesco Complex, Western Express Highway, Goregaon East, Mumbai 400063. Maharashtra.

GST - 27AABCH0007N1ZS | Website: [www.assetmanagement.hsbc.co.in](http://www.assetmanagement.hsbc.co.in)

**Mutual Fund investments are subject to market risks, read all scheme related documents carefully.**