



HSBC Mutual Fund

Market Flash

September 08, 2025





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Markets gain for 4th session, Nifty hovers around 24,800; Auto rallies

Benchmark indices have trimmed gains after making a strong opening on the first trading session of the week with the NSE Nifty 50 extending gains to the fourth consecutive session amid positive global cues. Investors will monitor inflation numbers due later this week.

Money market is shut today on account of Eid-e-Milad holiday.

At 10:40 AM, the frontline BSE Sensex was trading at 80,826 up 115 points or 0.14%. Market breadth is positive with in and out of a total of 4,035 shares traded on the Bombay Stock Exchange, 2,489 advanced while 1,320 declined and 226 remained unchanged. The broader Nifty50 was at 24,792 levels up 51 points or 0.21%.

In the broader markets, the Nifty Mid Cap index gained 0.71% and the Nifty Small Cap index added 0.44%.

Among sectors, the Nifty Auto index rallied 1.6%, followed by the Nifty Metal index, and the Nifty Realty index (up 1% each).

India's auto retail sector posted flat month-on-month (M-o-M) growth at 0.02% in August, while recording a modest 2.84% rise year-on-year (Y-o-Y), according to data from the Federation of Automobile Dealers Associations (FADA).

WEEKLY REVIEW – SEPT 1, 2025 – SEPT 5, 2025

The stock market ended the week on a positive note, with the Nifty closing above 24,700 and the Sensex above 80,700. The rise was mainly because of strong economic data, like a 7.8% jump in GDP and higher PMI numbers, showing steady growth in manufacturing and services. Investors also felt more confident after the government cut GST rates on basic goods, two-wheelers, and school items to help increase spending.

In the week ended on Friday, 5 September 2025, the BSE Sensex rallied 901.11 points or 1.12% to settle at 80,710.76. The NSE Nifty 50 index jumped 314.15 points or 1.28% to settle at 24,741. The BSE Mid Cap index shed 0.10% to close at 45,459.77. The BSE Small Cap rose 0.09% to end at 52,752.31. Autos and metals led sectoral gains, while IT stocks were the top drag.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
Domestic				
S&P BSE Sensex	80,710.76	-0.01	0	3.29
Nifty 50	24,741.00	0.03	0.37	4.64
S&P BSE 200	11,208.16	-0.02	0.12	2.53
S&P BSE 500	35,842.34	-0.01	0.14	1.86
S&P BSE Midcap	45,459.77	-0.1	-0.3	-2.12
S&P BSE Smallcap	52,752.31	0.09	-0.15	-4.4
S&P BSE Auto	58,883.09	1.3	10.35	13.98
S&P BSE Bankex	60,500.70	0.03	-1.82	4.78
S&P BSE Cap Goods	66,852.58	-0.25	-2.69	-1.37
S&P BSE Consumer Durables	62,399.45	0.1	3.97	-3.16
S&P BSE FMCG	20,739.02	-1.22	1.05	-0.16
S&P BSE Healthcare	44,254.04	0.02	0.18	-2.26
S&P BSE IT	34,049.10	-1.25	-1.22	-21.16
S&P BSE Metal	32,164.56	0.71	3.45	11.33
S&P BSE Oil & Gas	25,842.48	-0.08	-1.18	-0.85
S&P BSE Power	6,541.74	0.04	-2.3	-6.09
S&P BSE Realty	6,782.18	-1.07	-3.8	-17.63

Data as of 04 September 2025

GLOBAL MARKETS

US stocks fell on Friday after a weaker-than-expected jobs report raised concerns about the economy slowing down. The S&P 500 dropped 0.32% to 6,481.50, the Nasdaq slipped 0.03% to 21,700.39, and the Dow Jones lost 220.43 points, closing at 45,400.86.

Asian markets opened the week on a firm note on Monday, with Tokyo leading gains after Japan's Prime Minister announced his resignation, sending the yen lower and boosting exporters.

Shares in the Asia-Pacific region are trading in positive territory on Monday morning. The Asia Dow is up by 1.07 per cent, whereas Japan's Nikkei 225 is in the green, up by 1.54 per cent. Hong Kong's Hang Seng index is trading higher by 1.38 per cent.



RUPEE, OIL, GOLD & FIIs

Indian Rupee: The Indian rupee slipped to a new all-time low of 88.26 against the US dollar, led by fears of new US tariffs on the IT sector, persistent Foreign Portfolio Investor (FPI) outflows and strong importer demand.

Rupee fell to a fresh low of 88.26 on Friday, down 11 paise from the previous close. In intraday on Friday, it went to a low of 88.36. The domestic currency has fallen 3.3% in the current financial year.

Crude Oil: Crude prices moved slightly higher after OPEC+ indicated another supply increase from October. The group, however, chose a slower pace, adding just 137,000 barrels a day compared with much larger hikes in recent month.

Brent moved up 0.53% to \$62.2 a barrel, while U.S. WTI rose 0.6% to \$65.89.

FPIs & DIIs: Foreign institutional investors (FIIs) have offloaded Indian equities for all five days of the first week of September. The trend has resulted in a net outflow of Rs 5,667 crore, according to data from the stock exchanges.

Despite the continued selling by FIIs, domestic institutional investors (DIIs) have stepped in to counter the trend.

Month-to-date, DIIs have mopped up shares worth Rs 13,444 crore on a net basis. On Thursday and Friday alone, they bought over Rs 4,050 crore net.

On Friday (September 5), foreign investors turned sellers, offloading Rs 1,305 crore of Indian equities. In contrast, domestic institutions bought Rs 1,821 crore worth of shares, according to provisional exchange data.

Gold: Gold prices climbed toward \$3,590 in early Asian trade on Monday. The yellow metal hovered close to an all-time high as weaker US jobs data strengthened bets that the Federal Reserve will cut rates later this month.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
International				
DJIA*	44,785.50	-0.34	1.04	5.27
Nasdaq Composite*	21,100.31	-0.34	0.6	9.27
Nikkei 225 (Japan)	42,633.29	0.05	7.19	6.86
Straits Times (Singapore)	4,253.02	0.52	1.06	12.29
Hang Seng (Hong Kong)	25,339.14	0.93	0.83	26.32
Kospi Composite (Seoul)	3,168.73	0.86	-0.04	32.06
FTSE 100 (London)	9,309.20	0.23	3.29	13.9
Cac 40 (France)*	7,938.29	-0.44	1.8	7.55
Xetra Dax (Germany)*	24,293.34	0.07	-0.06	22.02
S&P 500 (US)*	6,370.17	-0.4	1.02	8.31
Shanghai (china)	3,825.76	1.45	6.81	14.14
MICEX (Russia)*	2,885.45	0.07	2.12	0.08
Bovespa (Brazil)*	1,34,511.00	-0.12	0.26	11.83
JCI (Indonesia)	7,858.85	-0.4	7	11
SET (Thailand)	1,253.39	0.69	5.17	-10.49

Data as of 02 September 2025, *Data as of 04 September 2025

FII equity investments, Rs cr

	Buy	Sell	Net	MTD
04-Sep	12,336.00	13,020.00	-684	-3,274.00
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	
Mar-25	2,98,911.92	2,90,858.48	8,053.44	
Last Close	12,336.00	13,020.00	-684	
6 Months average	3,24,358.48	3,26,856.75	-2,498.27	

-FII data as of 08 September 2025

MF equity investments, Rs cr

	Buy	Sell	Net	MTD
04-Sep	9,049.00	8,375.00	674	3,953.00*
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	
Mar-25	202659.75	196742.88	5916.87	
Last Close	9,049.00	8,375.00	674	
6 Months average	2,30,591.12	1,90,465.48	40,125.65	

-MF data as of 02 September 2025

Week Ahead

Indian equities entered last week on a cautiously optimistic note. Last week, the GST Council unveiled sweeping tax cuts—including a simplified two-rate structure and lower levies on essentials—that lifted the Nifty above 24,700 level and some buying emerging in the mid- and small-cap segments.

Concurrently, global cues remained supportive: weak US labor data and dovish Fed signals buoyed rate-cut expectations, aiding regional markets.

In India, the Inflation Rate for August 2025 would be released on Friday (September 05).

GLOBAL ANNOUNCEMENTS

In China, the balance of trade figures for August 2025 would be announced on Monday (September 08).

The Chinese Inflation Rate for August 2025 would be made public on Wednesday (September 10).

In the United States, the monthly Producer Price Inflation (PPI) figures for August 2025 would be announced.

The US Inflation Rate for August 2025 would be unveiled on Thursday (September 11).

The preliminary estimate for the Michigan Consumer Sentiment for September 2025 would be made public on Friday (September 12).

Source: Bloomberg, Capital Market, MOSL & HSBC MF estimates as on September 8, 2025 or as latest available.

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