Pre-Session: Sensex, Nifty likely to open flat; Asian markets mixed

📈 Market Opening Outlook: Nifty Signals flat opening

- Benchmark Indian equity indices, the BSE Sensex and NSE Nifty50 are expected to open on a flat to mildly positive note on Tuesday, as suggested by GIFT Nifty futures.

- Market sentiment will likely be guided by the latest retail inflation data for September, which eased to a 99-month low of 1.54%, driven by a 2.3% year-on-year decline in food prices — the sharpest drop in this key household spending component since December 2018

- On Monday, the 30-share benchmark index ended at 82327.05 down by -173.77 points or by -0.21 % and then NSE Nifty was at 25227.35 down by -58 points or by -0.23 %

- On the global front, Markets in the Asia-Pacific region traded mixed on Tuesday, diverging from Wall Street's strong rally after US President Donald Trump softened his stance on China. Following weeks of tit-for-tat trade measures and tense rhetoric, Trump said in a Truth Social post on Monday, "Don't worry about China, it will all be fine!" South Korea's Kospi index rose 1.01 per cent, while Japan's Nikkei 225 dropped 1.34 per cent, and Australia's S&P/ASX 200 slipped 0.25 per cent.

- Overnight in the US, Wall Street's major indices closed higher, led by gains in Broadcom and other semiconductor stocks, as Trump's tempered tone on US-China trade eased investor concerns. The broader S&P 500 advanced 1.56 per cent, the tech-heavy Nasdaq climbed 2.21 per cent, and the blue-chip Dow Jones Industrial Average added 1.29 per cent. Back home, Top traded Volumes on NSE Nifty – Tata Motors Ltd. 33288645.00, Tata Steel Ltd. 19386219.00, HDFC Bank Ltd. 18634254.00, Eternal Ltd. 14458590.00, Oil And Natural Gas Corporation Ltd. 12607116.00,

- On NSE, total number of shares traded was 437.85 Crore and total turnover stood at Rs. 91723.49 Crore. On NSE Future and Options, total number of contracts traded in index futures was 106405 with a total turnover of Rs. 20366.25 Crore. Along with this total number of contracts traded in stock futures were 1002196 with a total turnover of Rs. 69558.82 Crore. Total numbers of contracts for index options were 138841517 with a total turnover of Rs. 26303654.79 Crore. and total numbers of contracts for stock options were 5748113 with a total turnover of Rs. 412807.62 Crore.

- The FIIs on 13/10/2025 stood as net buyer in equity and debt. Gross equity purchased stood at Rs. 13617.83 Crore and gross debt purchased stood at Rs. 446.05 Crore, while the gross equity sold stood at Rs. 10874.50 Crore and gross debt sold stood at Rs. 366.89 Crore. Therefore, the net investment of equity and debt reported were Rs. 2743.33 Crore and Rs. 79.16

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