



# Monthly Newsletter

---

September 2025



## August 2025 Performance

Nifty 50  
24,635.00  
-1.40%

BSE Sensex  
79809.65  
-1.69%

Mid Cap  
44642.31  
-2.49%

Small Cap  
51449.23  
-3.70%

Gold  
3512.00  
3.30%



## Market Recap August 2025

Indian equities faced headwinds in August, with both benchmark indices ending lower for the second straight month. The Nifty 50 slipped 1.4% to close at 24,426.85, while the Sensex declined 1.7%, reflecting broad-based weakness across sectors. Mid-cap and small-cap indices also eased 0.4–0.6%, mirroring the cautious market tone.

Sentiment turned sharply negative in the final week of August after the U.S. imposed an additional 25% tariff on Indian-origin goods, effectively doubling duties to nearly 50%. The move sparked a broad sell-off, particularly in export-linked sectors such as textiles, chemicals, pharmaceuticals, and seafood processing, wiping out early-month gains.

Adding to the pressure, IT and financial stocks retreated after a brief mid-month rebound. However, consumer goods companies provided some resilience, rising 0.3–0.6% on optimism around potential GST rate cuts ahead of the upcoming GST Council meeting.

Overall, August proved to be a volatile month for Indian markets, marked by trade concerns, policy uncertainty, and selective sector resilience.

## Global Market Overview

Markets saw a mild pullback in August as investor sentiment turned cautious ahead of the anticipated Fed policy shift. The S&P 500 slipped 1.8%, while global equities posted mixed results — Emerging Markets fell 2.5% and Developed Markets eased 1.3%.

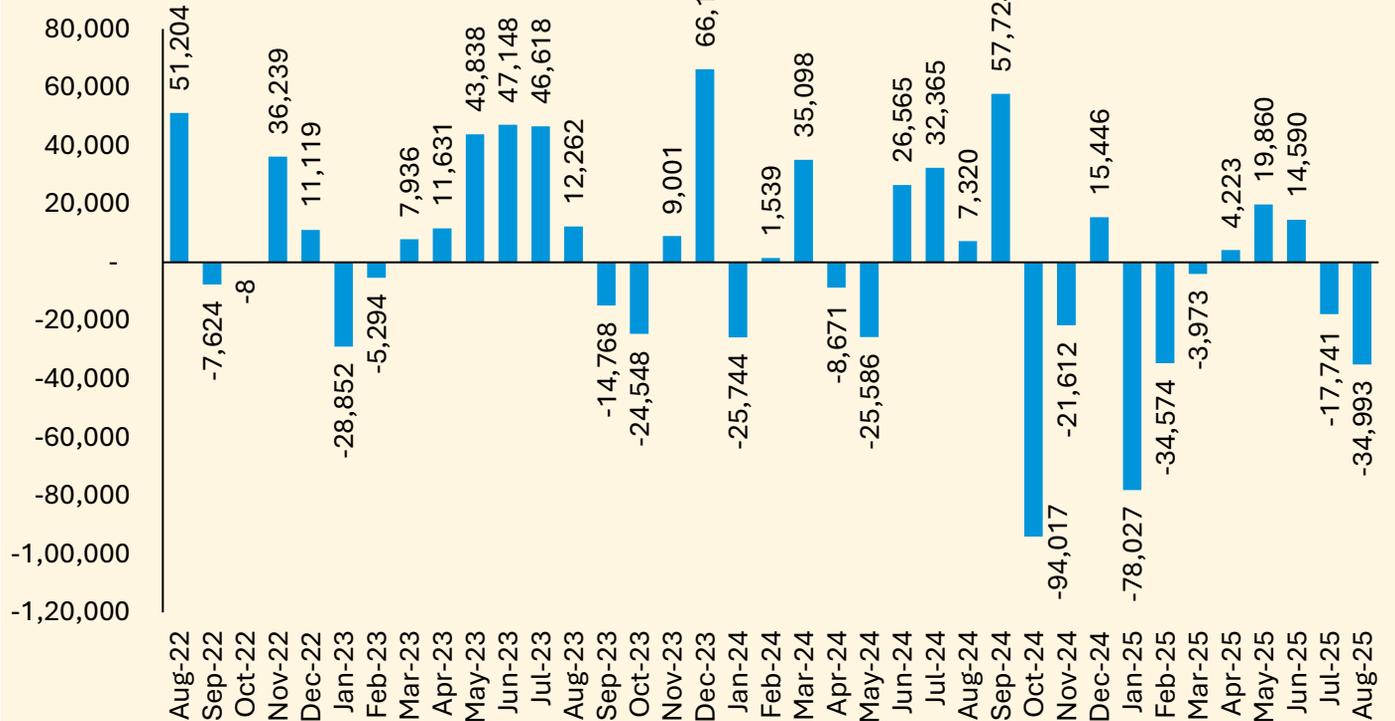
Sector performance was broadly negative, led by declines in Technology and Consumer Discretionary, both retreating after strong year-to-date gains. Energy and Utilities outperformed, supported by higher oil prices and defensive rotation.

On the economic front, U.S. job growth slowed, with the unemployment rate rising to 4.2%, signaling further cooling in labor conditions. Inflation moderated to 4.1%, providing the Fed room to consider rate adjustments in the following month.

Treasury yields moved slightly higher across shorter maturities, reflecting uncertainty around monetary policy direction, while long-term yields remained steady.

Overall, August was a consolidation month, as markets paused after a strong summer rally, awaiting clarity on the Fed's next move.

### FPI Investment Into Equity (In ₹ Crore)



Source: NSDL

## ➤ GST Reforms 2025: Relief for Common Man, Boost for Businesses

- GST simplified to a two-slab structure (5% & 18%)
- GST reforms cut taxes on household essentials (soaps, toothpaste, Indian breads) to 5% or Nil boosting affordability
- Life-saving drugs, medicines reduced from 12% to Nil or 5% making healthcare affordable
- Two-wheelers, small cars, TVs, ACs, cement cut from 28% to 18% bringing relief to middle-class.
- Farm machinery, irrigation equipment cut from 12% to 5%, reducing farming costs
- Tobacco, pan masala, aerated drinks, and luxury goods taxed at 40%.

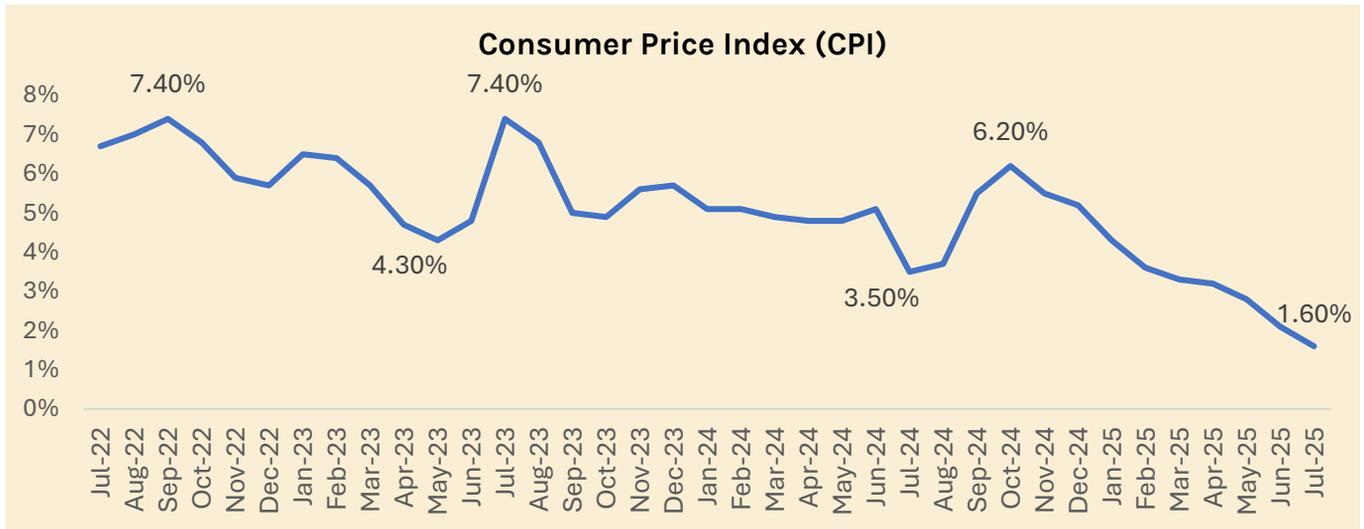
➤ The adoption of a simplified GST structure and wide-ranging rate reductions marks a new chapter in India's tax journey. By focusing on affordability for citizens, competitiveness for businesses, and transparency in compliance, these reforms make GST not just a tax system, but a catalyst for inclusive prosperity and economic transformation.

➤ Effective from 22nd September 2025, the reforms reaffirm India's commitment to building a simpler, fairer, and growth-oriented GST framework, ensuring both ease of living for people and ease of doing business for enterprises.

## ➤ WPI



## ➤ CPI



Source: MoSPI

- Wholesale inflation (WPI) fell to a 25-month low of **-0.6% YoY in Jul'25** (vs -0.1% in Jun'25), marking the second straight month of deflation, led by softer food and fuel prices.
- Retail inflation (CPI) also eased to **1.6% YoY**, its lowest since Jun'17, driven by a **-1.8% food inflation**, with sharp declines in vegetables (-20.7%) and pulses (-13.8%).
- CPI has stayed **below RBI's 4% target for six months**, prompting the MPC to cut its FY26 inflation forecast to **3.1%** (from 3.7%). Projections for 2Q/3QFY26 were reduced to **2.1%/3.1%**, while 4QFY26 remains at **4.4%**.
- Rationalisation of GST rates is expected to ease inflation further.

Script Name	Current Rate	30 D % Change
<b>Top 5 NIFTY Gainer</b>		
MARUTI	14,829.0	20.2
HEROMOTOCO	5,213.5	18.0
EICHERMOT	6,175.0	10.4
TITAN	3,625.4	9.4
BAJAJ-AUTO	8,940.0	7.3
<b>Top 5 NIFTY Losers</b>		
INDUSINDBK	748.6	-5.6
SHRIRAMFIN	588.6	-5.5
POWERGRID	280.1	-5.5
JIOFIN	312.5	-5.4
ICICIBANK	1409.9	-5.0

INDEX	August 31, 2025	30 D % Change
NIFTY AUTO	24,960.9	5.5%
NIFTY CONSUMER DURABLES	38,591.0	0.9%
NIFTY FMCG	56,141.9	0.6%
NIFTY IT	35,181.3	-0.3%
NIFTY METAL	9,154.8	-1.4%
NIFTY HEALTHCARE	14,350.3	-3.6%
NIFTY FINANCIAL SERVICES	25,567.7	-4.1%
NIFTY BANK	53,655.7	-4.1%
NIFTY OIL & GAS	10,789.8	-4.2%
NIFTY PHARMA	21,804.1	-4.2%
NIFTY REALTY	870.8	-4.6%
NIFTY CHEMICALS	29,463.7	-5.1%

Source: NSE

Particular	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
<b>Nifty 50</b>	0.8%	1.9%	-6.1%	-0.7%	-2.1%	-0.6%	-6.0%	6.0%	4.3%	1.7%	3.1%	-3.5%	-1.4%
<b>Nifty Midcap 50</b>	-0.7%	1.2%	-8.2%	0.4%	1.7%	-6.5%	-9.9%	7.4%	5.2%	4.5%	5.3%	-2.3%	-3.1%
<b>Nifty Smallcap 50</b>	2.0%	-0.1%	-2.7%	-1.0%	-0.6%	-10.0%	-12.0%	8.5%	3.0%	7.8%	7.3%	-2.3%	-4.7%
<b>Nifty 500</b>	0.5%	1.7%	-6.4%	-0.5%	-1.4%	-3.6%	-8.1%	7.0%	3.8%	3.5%	3.6%	-3.0%	-2.0%

SEBI Registered Investment Advisor:- Company Name: ORIM ADVISORS PRIVATE LIMITED SEBI Registration Number: INA000018294 CIN: U74999MH2021PTC373405

Address: 13/C, Mini Land, Tank Road, Bhandup West, Mumbai, Maharashtra 400078. Principal Officer & Compliance Officer: Vedant Sanjive Kumar Pathella Contact no: +91- 7977016006 Email: connect@orim.in Disclaimer: Investment in securities market are subject to market risks. Read all the related documents carefully before investing.

Registration granted by SEBI, membership of BASL and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors. Past performance should not be considered as a guarantee of future returns. Detailed Disclaimer: <https://orim.in/sebi-disclosures/> SEBI Office address: SEBI BHAVAN 2, PN-C/7, G Block BKC, Bandra Kurla Complex, Bandra East, Mumbai, Maharashtra 400051