



CkredenceTM
Wealth

Your Journey to Prosperity

SEBI (PMS) Regn No. INP000007164

SEBI (IA) Regn No. INA000020846



A New World Of
Opportunities & Growth

Market Landscape Sep' 25

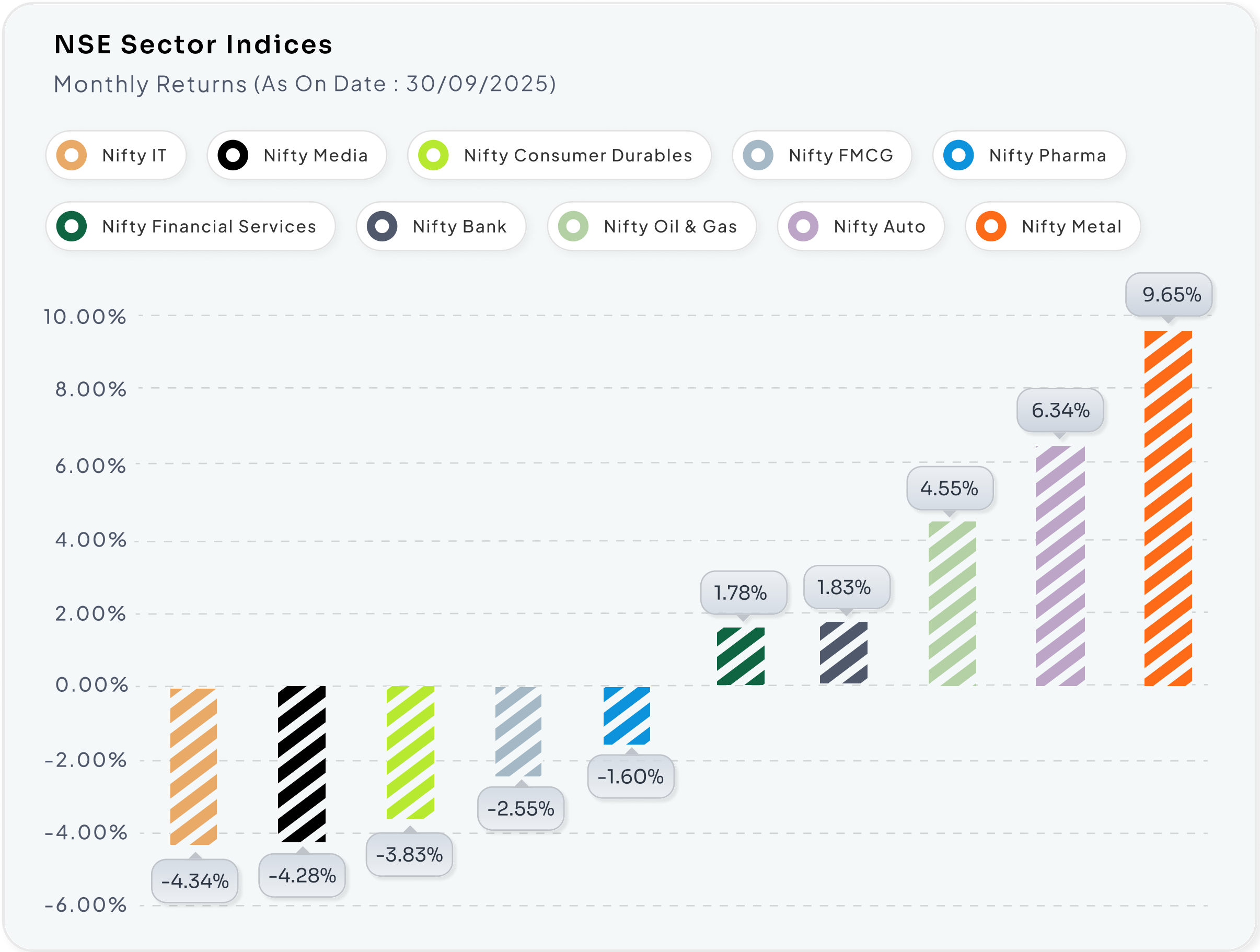
— Formerly Chirag Investment Since 1987 —

KEY INDICES PERFORMANCE (Sep`2025)

Indices	Opening	Closing	1M%Chg	1Y%Chg
Nifty 50	24,427	24,611	0.8%	-4.6%
BSE 500	35,288	35,714	1.2%	-6.6%
Nifty Mid Cap 100	55,727	56,529	1.4%	-6.0%
Nifty Small Cap 100	17,227	17,563	1.9%	-8.4%

Source: Investing.com

NSE SECTOR INDICES MONTHLY RETURN



Source: Investing.com

NIFTY 50 P/E

Current PE	FY26E
21.76	20.86
Source : Ckredencewealth.com	

(Data as on 30th Sep)

FII & DII ACTIVITY

(As On Date : 30/09/2025)

(Rs Cr)	MTD	QTD	YTD
FII's	- ₹ 35,301	- ₹ 1,29,871	- ₹ 4,29,625
DII's	₹ 65,344	₹ 2,21,111	₹ 7,64,620

Source: Moneycontrol.com

Global Market (Sep`2025)

GLOBAL INDICES

YOY %	OPENING	CLOSING	1M % CHG	1Y % CHG
Nasdaq 100	23,415	24,680	5.4%	23.0%
Dow Jones	45,650	46,361	1.6%	11.6%
Hang Seng	25,078	26,856	7.1%	27.1%
Nikkei 225	42,322	44,933	6.2%	18.5%
Source: Investing.com (As On Date : 30/09/2025)				

ECONOMIC INDICATORS

YOY %	CURRENT	QUARTER AGO	YEAR AGO
Consumer Price Index	2.07% (Aug - 25)	2.82% (May - 25)	3.65% (Aug - 24)
India Industrial Production	4% (Aug - 25)	1.2% (May - 25)	-0.1% (Aug - 24)
GDP	7.8% (Apr - Jun,2025)	7.4% (Jan - Mar,2025)	6.7% (Apr - Jun, 2024)
Wholesale Price Index	-0.52% (Aug - 25)	0.39% (May - 25)	1.31% (Aug - 24)
✦ Source: Ministry of Statistics and Programme Implementation, Office of the Economic Advisor			

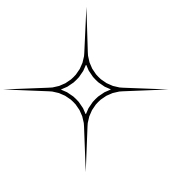
Currency & Commodity

PRICE MOVEMENT

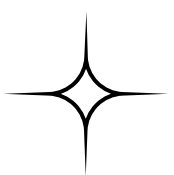
Currency And Commodity	30 Sep	1M Ago	3M Ago	1Y Ago
USD/INR	89	88	86	84
NYMEX Crude oil(\$/bbl)	62	64	65	68
Gold (Rs / 10gm)	1,17,265	1,04,927	98,094	80,940

✦ Source - ibja- rates spot prices, investing.com, tradingview, gold price india

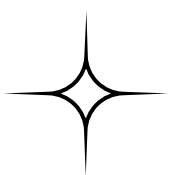
BHARAT BULLETIN



India's economy grew at 7.8% in Q1FY26, the fastest pace in five quarters. Growth was higher than the 6.5% recorded in Q1FY25 and 7.4% in Q4FY25. Services sector was the standout performer, expanding 9.3%, its strongest growth in two years. Manufacturing grew 7.7%. Construction growth slowed to 7.6%.

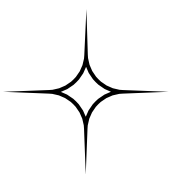


India posted a current account deficit of \$2.5bn in the first quarter of the 2026 financial year, narrowing from the \$6.6bn gap in the corresponding quarter of the previous year to mark the softest deficit in the period since 2021.

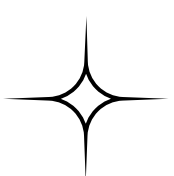


India's Infrastructure Investment Trusts (InvITs) are set for wider participation after the SEBI lowered minimum subscription in privately placed InvITs to Rs 2.5 mn.

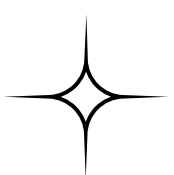
INTERNATIONAL UPDATES



China's trade surplus stood USD 102.33 bn in Aug-25, higher than USD 91.29 bn in Aug-24, as exports outpaced imports.



Mexico plans to impose tariffs of as much as 50% on cars and other products made by China and several Asian exporters, aligning country more closely with US protectionism



The UK's unemployment rate held steady at 4.7% in the three months to July 2025, the highest since August 2021.

RISK FACTOR AND DISCLAIMER

Equities as an asset class carry a higher risk in comparison to debt. While risk cannot be totally eliminated, it can be mitigated through a well-designed investment strategy. However, this objective may not be fully achieved due to various reasons such as unfavourable market movements, misjudgement by portfolio manager, adverse political or economic developments etc.

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About the Company:

Ckredence Wealth Management Private Limited is registered with the Securities and Exchange Board of India (“SEBI”) as Portfolio Manager and an Investment Adviser under SEBI (Portfolio Managers) Regulations 2020. Vide Registration no. INP000007164 dated June 7, 2021. and SEBI (Investment Advisers) Regulations, 2013 (“IA regulations”) vide registration no. INA000020846 dated August 7, 2025, pursuant to which it provides Portfolio Management and Investment Advisory services to its clients.