

## Market Snapshot

KEY INDICES	01-Aug-25	25-Jul-25	%Ch
S&P CNX NIFTY	24565.35	24837.00	-1.09
SENSEX	80599.91	81463.09	-1.06
NIFTY MIDCAP 100	56637.15	58009.45	-2.37
NIFTY SMLCAP 100	17668.20	18294.45	-3.42

(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	01-Aug-25	25-Jul-25	%Ch
NIFTY BANK	55617.60	56528.90	-1.61
NIFTY AUTO	23410.95	23781.55	-1.56
NIFTY FMCG	56197.05	54579.95	2.96
NIFTY IT	34649.60	35623.75	-2.73
NIFTY METAL	9102.35	9425.10	-3.42
NIFTY PHARMA	22011.70	22662.70	-2.87
NIFTY REALTY	896.15	950.60	-5.73
BSE CG	67850.22	69136.11	-1.86
BSE CD	59183.30	59563.49	-0.64
BSE Oil & GAS	26283.87	27028.50	-2.75
BSE POWER	6668.03	6707.61	-0.59

(Source: [Investing.com](https://www.investing.com))

## FII & DII Activities (Rs Crore)

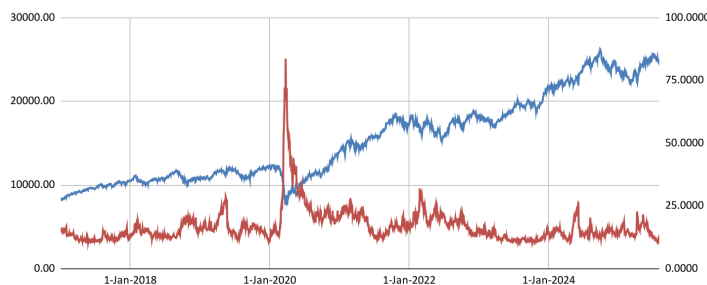
25/07/2025 to 01/08/2025

Activities	FIIs	DIIIs
Buy	79422.13	90098.40
Sell	98808.40	63659.76
Net	-19386.27	26438.64

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nseindia.com))

## Benchmarks tumble for 5th straight week; Nifty settles below 24,600 level

The key equity benchmarks ended with substantial losses during the week, weighed down by concerns over the India-U.S. trade relationship after U.S. President Donald Trump announced a 25% tariff on Indian goods, effective August 1 along with an additional, unspecified penalty reportedly linked to India's procurement from Russia.

Market mood remained cautious, as investors closely tracked the ongoing earnings season and awaited further developments on the trade front. Domestic economic data took a back seat, with geopolitical tensions dominating investor focus.

In the week ended on Friday, 1 August 2025, the S&P BSE Sensex declined 863.18 points or 1.06% to settle at 80,599.91. The Nifty 50 index fell 271.65 points or 1.09% to settle at 24,565.35. The BSE Mid-Cap index dropped 1.79% to close at 45,155.79. The BSE Small-Cap index tumbled 2.47% to end at 52,575.33.

## Sensex Gainers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
HINDUNILVR	2551.35	2415.10	<b>5.64</b>
LT	3589.65	3443.35	<b>4.25</b>
ASIANPAINT	2429.45	2335.65	<b>4.02</b>
ITC	416.50	409.35	<b>1.75</b>
HDFCBANK	2012.25	2004.50	<b>0.39</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
WIPRO	242.80	259.35	<b>-6.38</b>
KOTAKBANK	1992.10	2124.95	<b>-6.25</b>
TATAMOTORS	648.75	687.30	<b>-5.61</b>
TATASTEEL	153.00	161.40	<b>-5.20</b>
INDUSINDBK	783.70	823.70	<b>-4.86</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
HINDUNILVR	2553.70	2415.40	<b>5.73</b>
LT	3587.30	3442.90	<b>4.19</b>
ASIANPAINT	2431.00	2336.20	<b>4.06</b>
BRITANNIA	5798.00	5594.00	<b>3.65</b>
HEROMOTOCO	4311.60	4230.70	<b>1.91</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
UPL	665.15	722.20	<b>-7.90</b>
WIPRO	242.75	259.20	<b>-6.35</b>
KOTAKBANK	1992.40	2124.60	<b>-6.22</b>
TATAMOTORS	648.85	687.40	<b>-5.61</b>
TATASTEEL	153.01	161.43	<b>-5.22</b>

(Source: Capitaline)

The International Monetary Fund (IMF) has upgraded India's economic growth estimate to 6.4% in both 2025-26 and 2026-27 as compared to what it had predicted in April. The growth upgrade, of 0.2 percentage points and 0.1 percentage points, respectively, is in line with the upgrades for global growth. The upward revision is primarily due to the suspension of higher tariffs, strong consumption growth, and a steady push for public investment. Inflation projections are also revised down to 3.7% in 2025 and 4% in 2026, thanks to easing food prices.

India's manufacturing PMI rose from 58.4 in June to 59.1 in July, indicating a solid improvement in business conditions.

The rise was mainly driven by a sharp increase in new orders, as companies benefited from strong demand and effective marketing efforts. In fact, sales grew at their fastest pace in nearly five years, highlighting growing confidence in the manufacturing sector.

### Monthly Auto Sales:

Tata Motors declined 2.17% after the company's total sales dropped 3.98% to 69,131 units in July 2025 compared with 71,996 units in July 2024.

Mahindra & Mahindra (M&M) dropped 2.66%. The company said that its overall auto sales grew by 25.95% to 83,691 vehicles sold in July 2025 as against 66,444 vehicles sold in July 2024.

Bajaj Auto fell 0.29%. The company has reported 3% rise in total auto sales for July 2025, selling 3.66 lakh units as against 3.54 lakh units sold in July 2024.

SML Isuzu declined 9.2%. The company said that it has sold 1,427 units in July 2025, registering a growth of 18.6% from 1,203 units sold in the same period last year.

Ashok Leyland dropped 1.92%. The company reported an 8% rise in total commercial vehicle sales to 15,064 units in July 2025 from 13,928 units sold in July 2024.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
COROMANDEL	2590.40	2442.80	6.04
MPHASIS	2757.40	2625.00	5.04
SYNGENE	703.25	681.10	3.25
LALPATHLAB	3177.20	3077.10	3.25
TVSMOTOR	2858.20	2774.40	3.02

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	01-Aug-25	25-Jul-25	%Ch
IDEA	6.60	7.20	-8.33
BANDHANBNK	163.42	178.19	-8.29
TRIDENT	28.90	31.49	-8.22
GODREJPROP	2050.60	2233.80	-8.20
SAIL	120.12	130.67	-8.07

(Source: Capitaline)

## World Markets

KEY INDICES	01-Aug-25	25-Jul-25	%Ch
DJIA	43588.58	44901.92	-2.92
NASDAQ	20650.13	21108.32	-2.17
BOVESPA	132437.39	133524.19	-0.81
FTSE 100	9068.58	9120.31	-0.57
CAC 40	7546.16	7834.58	-3.68
DAX	23425.97	24217.50	-3.27
MOEX RUSSIA	2727.98	2772.39	-1.60
NIKKEI 225	40799.60	41456.23	-1.58
HANG SENG	24507.81	25388.35	-3.47
STRAITS TIMES	4153.83	4261.06	-2.52
SHANGHAI COMPOSITE	3559.95	3593.66	-0.94
JAKARTA	7537.77	7543.50	-0.08

(Source: Capitaline, [Investing.com](https://www.investing.com))

TVS Motor Company advanced 2.52%. The company has registered sales of 456,350 units in July 2025, which is higher by 29% as compared with the 354,140 units sold in July 2024.

Maruti Suzuki India shed 0.81%. The company reported total sales of 180,526 units in July 2025, marking a 3.13% increase compared to 175,041 units sold in the same month last year.

### Global Markets:

China's official NBS Manufacturing PMI dropped to 49.3 in July 2025 from June's three-month high of 49.7.

The Federal Reserve holds interest rates steady for the fifth consecutive meeting, with two Fed governors dissenting for the first time in more than three decades.

(Source: Capitaline)

## Outlook and Technical View

Q1FY26 results to remain in focus. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Development in trade deals negotiations between US-INDIA to remain in focus. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 24472, 24379, 24223, 24152 while levels of 24628, 24721, 24877, 24970 may act as resistance with pivot point at 24622.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	28-Aug-25	24618.00	24938.90	<b>-1.29%</b>	<b>52.65</b>	675618	295578	<b>128.58%</b>
<b>BANKNIFTY</b>	28-Aug-25	55796.40	56720.00	<b>-1.63%</b>	<b>178.80</b>	141174	39153	<b>260.57%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>IDEA</b>	6.60	6.64	28-Aug-25	<b>8.19%</b>
<b>BAJAJFINSV</b>	1916.30	1926.30	28-Aug-25	<b>7.05%</b>
<b>DIVISLAB</b>	6361.50	6394.00	28-Aug-25	<b>6.91%</b>
<b>TORNTPOWER</b>	1288.20	1294.70	28-Aug-25	<b>6.82%</b>
<b>INDUSINDBK</b>	783.70	787.65	28-Aug-25	<b>6.81%</b>
<b>ADANIPTS</b>	1347.10	1353.80	28-Aug-25	<b>6.72%</b>
<b>HDFCBANK</b>	2012.20	2022.20	28-Aug-25	<b>6.72%</b>
<b>DABUR</b>	534.35	537.00	28-Aug-25	<b>6.70%</b>
<b>ITC</b>	416.45	418.45	28-Aug-25	<b>6.49%</b>
<b>BHEL</b>	231.60	232.71	28-Aug-25	<b>6.48%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>PAGEIND</b>	46810.00	45790.00	28-Aug-25	<b>-29.46%</b>
<b>COALINDIA</b>	372.50	364.45	28-Aug-25	<b>-29.21%</b>
<b>VOLTAS</b>	1317.40	1297.30	28-Aug-25	<b>-20.63%</b>
<b>IGL</b>	201.54	198.48	28-Aug-25	<b>-20.53%</b>
<b>HEROMOTOCO</b>	4311.60	4268.40	28-Aug-25	<b>-13.54%</b>
<b>NMDC</b>	70.46	69.81	28-Aug-25	<b>-12.47%</b>
<b>BRITANNIA</b>	5798.00	5747.00	28-Aug-25	<b>-11.89%</b>
<b>LICHSGFIN</b>	570.25	566.05	28-Aug-25	<b>-9.96%</b>
<b>BANDHANBNK</b>	163.42	162.39	28-Aug-25	<b>-8.52%</b>
<b>HINDALCO</b>	672.45	668.75	28-Aug-25	<b>-7.44%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	37084800	36245550	<b>1.02</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. EMAMILTD</b>	<b>2. VBL</b>	<b>3. HINDUNILVR</b>	<b>4. RADICO</b>	<b>5. DABUR</b>
<b>6. GODREJCP</b>	<b>7. BRITANNIA</b>	<b>8. MARICO</b>	<b>9. GODREJPROP</b>	<b>10. BRIGADE</b>
<b>11. RAYMOND</b>	<b>12. OBEROIRLTY</b>	<b>13. DLF</b>	<b>14. LODHA</b>	<b>15. PHOENIXLTD</b>
<b>16. PRESTIGE</b>				

(Source: [Moneycontrol](#))

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Salt Lake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [helpdesk@shriraminsight.com](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com)