

Market Snapshot

KEY INDICES	03-Jul-26	25-Jun-26	%Ch
S&P CNX NIFTY	24270.85	24056.00	0.89
SENSEX	77763.91	77100.47	0.86
NIFTY MIDCAP 100	62190.30	61795.50	0.64
NIFTY SMLCAP 100	19175.10	18790.35	2.05

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

Sectoral Snapshot

KEY INDICES	03-Jul-26	25-Jun-26	%Ch
NIFTY BANK	57938.50	58177.05	-0.41
NIFTY AUTO	26988.10	26977.75	0.04
NIFTY FMCG	50096.40	49419.25	1.37
NIFTY IT	27439.40	27330.85	0.40
NIFTY METAL	12598.45	12445.65	1.23
NIFTY PHARMA	25745.15	24969.50	3.11
NIFTY REALTY	890.80	826.25	7.81
BSE CG	78740.83	80938.07	-2.71
BSE CD	60699.40	59369.44	2.24
BSE Oil & GAS	26201.08	26309.83	-0.41
BSE POWER	7838.06	8043.89	-2.56

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

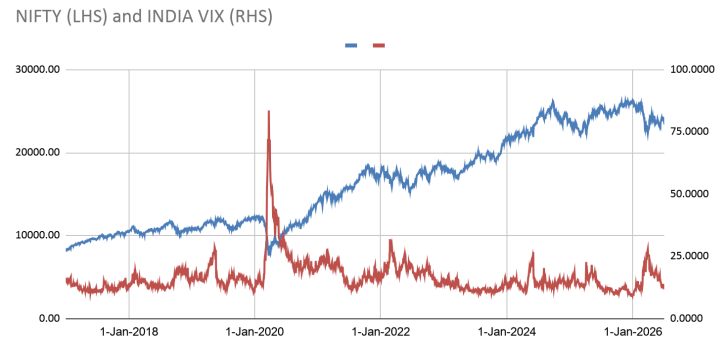
FII & DII Activities (Rs Crore)

25/06/2026 to 03/07/2026

Activities	FIIs	DIIs
Buy	124273.37	156754.99
Sell	118584.97	138373.70
Net	5688.40	18381.29

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Markets end week higher on domestic resilience despite mixed global cues

Indian equity markets ended the week with gains, supported by resilient domestic fundamentals, positive stock-specific developments and continued expansion in manufacturing and services activity, although India's services PMI moderated in June. Global cues remained mixed. The U.S. labour market weakened as June job additions missed expectations, reinforcing expectations of a Federal Reserve rate cut. In Europe, Eurozone inflation eased, while the European Commission reduced duty-free steel import quotas. Britain's economy expanded 0.6% in the January–March quarter. In Asia, China's manufacturing activity returned to expansion and its services sector continued to grow, while Japan's services sector also returned to expansion in June. Overall, resilient domestic fundamentals and improving expectations of easier global monetary policy supported investor sentiment during the week.

In the week ended on Friday, 03 July 2026, the S&P BSE Sensex jumped 663.44 points or 0.86% to settle at 77,763.91. The Nifty 50 index rose 215.5 points or 0.90% to settle at

Sensex Gainers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
BAJAJFINSV	1895.75	1764.15	7.46
INDUSINDBK	975.65	918.80	6.19
BAJFINANCE	1033.00	979.90	5.42
MARUTI	14364.50	13741.75	4.53
NESTLEIND	1459.40	1403.05	4.02

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
LT	4026.80	4219.95	-4.58
KOTAKBANK	396.70	409.00	-3.01
TMPV	344.15	353.20	-2.56
AXISBANK	1342.50	1376.55	-2.47
TECHM	1410.40	1436.65	-1.83

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
BAJAJFINSV	1895.60	1764.60	7.42
INDUSINDBK	974.35	918.95	6.03
BAJFINANCE	1031.40	980.40	5.20
MARUTI	14366.00	13745.00	4.52
ADANIPTS	1874.20	1796.00	4.35

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
LT	4026.60	4216.40	-4.50
EICHERMOT	7339.50	7598.00	-3.40
HDFCLIFE	567.70	585.45	-3.03
KOTAKBANK	396.75	409.00	-3.00
TMPV	344.10	353.20	-2.58

(Source: Capitaline)

24,271.50. The BSE 150 Mid-Cap index gained 1.18% to close at 16,820.81. The BSE 250 Small-Cap jumped 1.12% to end at 7,113.98.

India's HSBC Manufacturing Purchasing Managers' Index (PMI) eased to 54.2 in June from 55.0 in May. The seasonally adjusted HSBC India Services PMI Business Activity Index eased to 57.4 in June from 59.8 in May.

Meanwhile, India's gross Goods and Services Tax (GST) collections rose 13.9% year-on-year to Rs 1.95 lakh crore in June 2026 from Rs 1.71 lakh crore a year earlier, supported by healthy domestic demand and strong import growth. Net GST collections increased 11.2% to Rs 1.62 lakh crore despite a sharp rise in refunds, while GST revenue from imports surged 34.6% year-on-year.

India's fiscal deficit reached Rs 1.62 lakh crore in the first two months of FY27 (through May), accounting for 9.6% of the full-year budget target, up sharply from 0.8% a year earlier. Total receipts stood at Rs 7.19 lakh crore, while expenditure was Rs 8.81 lakh crore. Revenue receipts came in at Rs 6.99 lakh crore, including Rs 3.48 lakh crore in tax revenue and Rs 3.51 lakh crore in non-tax revenue.

Global Markets:

China: The NBS manufacturing PMI rose to 50.3 from 50.0 in May. The non-manufacturing PMI edged up to 50.2 in June from 50.1 in May. The S&P Global China General Services PMI slipped to 54.1 from 54.4 in May.

United States: The U.S. economy added 57,000 jobs in June 2026, significantly below the downwardly revised 129,000 recorded in May and market expectations of 110,000. It marked the weakest monthly job growth in four months, ending a streak of three consecutive months of stronger-than-expected gains.

United Kingdom: Britain's economy grew 0.6% in the January-March quarter, matching the initial estimate, official data showed. However, households remained under

Nifty Midcap 100 Gainers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
OBEROIRLTY	1934.40	1749.20	10.59
IPCALAB	1778.90	1618.30	9.92
LTF	327.00	299.00	9.36
DELHIVERY	507.45	464.80	9.18
PAYTM	1221.40	1124.80	8.59

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	03-Jul-26	25-Jun-26	%Ch
GUJENERGY	298.10	344.00	-13.34
IGL	153.99	170.38	-9.62
TATAELXI	3678.90	4028.30	-8.67
TATACHEM	693.10	746.20	-7.12
ASTRAL	1385.00	1486.90	-6.85

(Source: Capitaline)

World Markets

KEY INDICES	03-Jul-26	26-Jun-26	%Ch
DJIA	CLOSED	51876.11	-
NASDAQ	CLOSED	25297.62	-
BOVESPA	174266.00	173295.14	0.56
FTSE 100	10679.03	10508.02	1.63
CAC 40	8508.07	8384.87	1.47
DAX	25779.31	24671.22	4.49
MOEX RUSSIA	2242.84	2285.61	-1.87
NIKKEI 225	69744.07	69360.88	0.55
HANG SENG	23350.03	22671.86	2.99
STRAITS TIMES	5244.29	5191.73	1.01
SHANGHAI COMPOSITE	4043.64	4027.27	0.41
JAKARTA	5875.78	5896.13	-0.35

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

pressure even before the full impact of the U.S.-Iran conflict filtered through the economy.

Europe: The European Commission said it will reduce the European Union's duty-free steel import quotas by an average of 47% from 1 July. Eurozone inflation eased to 2.8% in June from 3.2% in May.

Japan: Japan's services sector returned to expansion in June after stalling in the previous month, although business confidence remained subdued amid concerns over Middle East tensions and intensifying cost pressures. The S&P Global Japan Services PMI rose to 52.2 in June from 50.0 in May, signalling renewed growth in business activity.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor developments leading to the final US-Iran deal during the 60-days ceasefire period, progress in monsoon, movement in crude oil and gold prices. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar 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 24222, 24174, 24096, 24022 while levels of 24348, 24426, 24474, 24552 may act as resistance with pivot point at 24300.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Jul-26	24351.10	24180.00	0.71%	295.10	682126	366626	86.05%
BANKNIFTY	28-Jul-26	58255.00	58660.00	-0.69%	77.95	148004	83674	76.88%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
BIOCON	426.80	429.55	28-Jul-26	9.41%
MANAPPURAM	328.20	330.25	28-Jul-26	9.12%
BANKBARODA	252.20	253.75	28-Jul-26	8.97%
HINDUNILVR	2201.20	2214.60	28-Jul-26	8.89%
IOC	141.56	142.37	28-Jul-26	8.35%
CIPLA	1458.20	1466.50	28-Jul-26	8.31%
MFSL	1596.60	1605.60	28-Jul-26	8.23%
ULTRACEMCO	11723.00	11789.00	28-Jul-26	8.22%
MUTHOOTFIN	3054.90	3071.70	28-Jul-26	8.03%
FEDERALBNK	327.40	329.20	28-Jul-26	8.03%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	176.08	173.04	28-Jul-26	-25.21%
HEROMOTOCO	4852.60	4793.40	28-Jul-26	-17.81%
UPL	607.40	602.80	28-Jul-26	-11.06%
DRREDDY	1374.10	1363.70	28-Jul-26	-11.05%
DABUR	444.35	441.30	28-Jul-26	-10.02%
TCS	2093.50	2079.20	28-Jul-26	-9.97%
HCLTECH	1139.00	1131.40	28-Jul-26	-9.74%
SIEMENS	3536.30	3521.40	28-Jul-26	-6.15%
CUMMINSIND	5478.00	5461.00	28-Jul-26	-4.53%
TECHM	1410.10	1406.60	28-Jul-26	-3.62%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	48757410	42912935	1.14

(Source: Capitaline)

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

1. LODHA	2. OBEROIRLTY	3. DLF	4. GODREJPROP	5. PHOENIXLTD
6. PRESTIGE	7. ANANTRAJ	8. GVT&D	9. APARINDS	10. ENRIN
11. KIRLOSENG	12. POWERINDIA	13. TIMKEN	14. ASTRAL	15. SUPREMEIND
16. CGPOWER	17. WAAREEENER	18. BHEL	19. THERMAX	20. ELGIEQUIP

(Source: [Moneycontrol](#))

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