

Market Snapshot

KEY INDICES	04-Jul-25	27-Jun-25	%Ch
S&P CNX NIFTY	25461.00	25637.80	-0.69
SENSEX	83432.89	84058.90	-0.74
NIFTY MIDCAP 100	59677.75	59385.15	0.49
NIFTY SMLCAP 100	19033.05	18976.80	0.30

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

Sectoral Snapshot

KEY INDICES	04-Jul-25	27-Jun-25	%Ch
NIFTY BANK	57031.90	57443.90	-0.72
NIFTY AUTO	23980.40	24007.95	-0.11
NIFTY FMCG	54735.60	55109.00	-0.68
NIFTY IT	39166.55	38822.95	0.89
NIFTY METAL	9580.40	9578.20	0.02
NIFTY PHARMA	22384.60	21928.60	2.08
NIFTY REALTY	971.95	993.95	-2.21
BSE CG	72322.41	71548.78	1.08
BSE CD	61125.16	59533.77	2.67
BSE Oil & GAS	28356.53	27919.83	1.56
BSE POWER	6847.59	6929.40	-1.18

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

FII & DII Activities (Rs Crore)

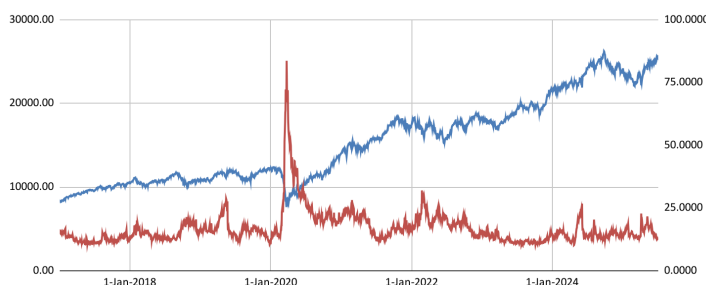
27/06/2025 to 04/07/2025

Activities	FIIs	DIIIs
Buy	109679.63	109729.36
Sell	94762.41	102708.87
Net	14917.22	7020.49

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Barometers snap 2-week gains; Nifty settle at above 25,450 mark

The key equity benchmarks ended with significant losses during the week, weighted down by uncertainty over the India - US trade deal and underwhelming monthly sales data. Market sentiment remained cautious, with investors looking ahead to the upcoming earnings season and further developments on the trade front. Investors largely overlooked domestic economic data and remained focused on geopolitical factors. Broader market outperformed the headline indices.

In the week ended on Friday, 04 July 2025, the S&P BSE Sensex declined 626.01 points or 0.74% to settle at 83,432.89. The Nifty 50 index fell 176.80 points or 0.69% to settle at 25,461. The BSE Mid-Cap index rose 0.59% to close at 46,814.34. The BSE Small-Cap index added 1.07% to end at 54,830.34.

India's industrial output growth fell to a nine-month low of 1.2% in May 2025. The factory output, measured by the Index of Industrial Production (IIP), had grown 6.3% in May 2024, while the April 2025 estimate has been revised to

Sensex Gainers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
ASIANPAINT	2424.80	2359.25	2.78
ULTRACEMCO	12505.60	12234.95	2.21
INFY	1640.20	1608.60	1.96
WIPRO	270.05	265.05	1.89
HINDUNILVR	2339.80	2306.15	1.46

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
AXISBANK	1177.55	1225.20	-3.89
KOTAKBANK	2128.40	2208.00	-3.61
NESTLEIND	2392.05	2457.75	-2.67
BAJAJFINSV	1993.80	2042.90	-2.40
LT	3593.70	3678.85	-2.31

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
UPL	681.30	644.90	5.64
BPCL	346.20	333.00	3.96
DIVISLAB	6906.50	6658.00	3.73
IOC	151.62	147.22	2.99
ASIANPAINT	2424.20	2358.70	2.78

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
AXISBANK	1177.60	1225.10	-3.88
KOTAKBANK	2129.80	2207.90	-3.54
SBILIFE	1799.70	1850.60	-2.75
HDFCLIFE	785.10	806.95	-2.71
NESTLEIND	2392.80	2458.70	-2.68

(Source: Capitaline)

2.6%, slightly down from the earlier 2.7%. Manufacturing grew 2.6% in May, down from 5.1% a year ago. Mining output shrank 0.1%, reversing a 6.6% expansion in May last year. Electricity generation saw a sharp contraction of 5.8% compared to a robust 13.7% growth a year ago.

The seasonally adjusted HSBC India Services PMI Business Activity Index rose from 58.8 in May to a ten-month high of 60.4 in June. The Composite PMI Output Index rose from 59.3 in May to 61.0. The Manufacturing PMI rose to a 14-month high of 58.4 in June, up from 57.6 in May.

India - US trade deal update:

India and the US are actively engaged in trade negotiations as the July 9 deadline looms. If a deal is not reached by then, Indian exports to the US could face a total tariff of 36% (10% baseline tariffs plus 26% reciprocal tariffs). Trump has indicated that the deadline may not be extended.

SEBI Action on Jane Street:

The Securities and Exchange Board of India (SEBI) has barred U.S.-based trading firm Jane Street Group from accessing the Indian securities market. According to an order posted on SEBI's website, the firm and its related entities are prohibited from buying, selling, or otherwise dealing in securities, directly or indirectly.

SEBI has also issued an interim order to impound over Rs 4,843.57 crore in alleged illegal gains. The regulator stated that Jane Street allegedly used strategies to artificially influence the Nifty 50 index to benefit from larger positions in index options. Banks have been directed not to allow any debits from accounts held individually or jointly by the firm's entities without SEBI's prior approval.

Global Markets:

In China NBS manufacturing PMI inched up to 49.7 from May's 49.5. Meanwhile, the non-manufacturing PMI ticked up to 50.5 from 50.3.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
LAURUSLABS	776.00	701.80	10.57
IDFCFIRSTB	77.88	72.36	7.63
BIOCON	380.05	354.40	7.24
IPCALAB	1422.80	1331.70	6.84
AUROPHARMA	1191.30	1121.00	6.27

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	04-Jul-25	27-Jun-25	%Ch
CONCOR	599.65	756.35	-20.72
TRENT	5456.00	6019.50	-9.36
COROMANDEL	2233.70	2432.20	-8.16
SHRIRAMFIN	676.15	699.95	-3.40
PRESTIGE	1613.00	1665.40	-3.15

(Source: Capitaline)

China Caixin Manufacturing PMI rose to 50.4 in June, a significant improvement from May's reading of 48.3.

Annual inflation in the Eurozone edged up to 2% in June. This marks a slight increase from May, when inflation stood at 1.9%.

U.S. nonfarm payrolls increased by 147,000 in June, revised upward from 144,000 in May. The unemployment rate declined slightly to 4.1%. Private payrolls disappointed again. June saw a decline of 33,000 jobs, against expectations of a 99,000 gain. May's figures were also revised down to 29,000.

U.S. announced trade deal with Vietnam. According to a post on Truth Social, the U.S. will slap a 20% tariff on Vietnamese imports, while Vietnam will impose "ZERO Tariff" on U.S. goods. The announcement came as Trump's 90-day tariff reprieve nears its deadline.

(Source: Capitaline)

World Markets

KEY INDICES	04-Jul-25	27-Jun-25	%Ch
DJIA	CLOSED	43819.27	-
NASDAQ	CLOSED	20273.46	-
BOVESPA	141263.56	136865.80	3.21
FTSE 100	8822.91	8798.91	0.27
CAC 40	7696.27	7691.55	0.06
DAX	23787.45	24033.22	-1.02
MOEX RUSSIA	2801.65	2806.11	-0.16
NIKKEI 225	39810.88	40150.79	-0.85
HANG SENG	23916.06	24284.15	-1.52
STRAITS TIMES	4013.62	3966.20	1.20
SHANGHAI COMPOSITE	3472.32	3424.23	1.40
JAKARTA	6865.19	CLOSED	-

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

Outlook and Technical View

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Development in trade deals between US-China and 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 25372, 25282, 25233, 25152 while levels of 25510, 25560, 25649, 25782 may act as resistance with pivot point at 25421.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	31-Jul-25	25552.00	25757.00	-0.80%	91.00	538584	595971	-9.63%
BANKNIFTY	31-Jul-25	57305.20	57637.00	-0.58%	273.30	133735	152922	-12.55%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	7.36	7.41	31-Jul-25	9.18%
IGL	226.10	227.47	31-Jul-25	8.19%
GLENMARK	1830.40	1841.10	31-Jul-25	7.90%
MARICO	728.60	732.70	31-Jul-25	7.61%
HINDPETRO	444.60	447.10	31-Jul-25	7.60%
GODREJCP	1192.90	1199.60	31-Jul-25	7.59%
IOC	151.62	152.46	31-Jul-25	7.49%
TATACHEM	939.00	944.15	31-Jul-25	7.41%
PEL	1157.90	1164.20	31-Jul-25	7.36%
ASHOKLEY	249.85	251.20	31-Jul-25	7.30%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	48710.00	47985.00	31-Jul-25	-20.12%
BOSCHLTD	35930.00	35510.00	31-Jul-25	-15.80%
HEROMOTOCO	4345.00	4299.00	31-Jul-25	-14.31%
DABUR	495.10	491.15	31-Jul-25	-10.79%
CUMMINSIND	3342.00	3318.40	31-Jul-25	-9.55%
HCLTECH	1725.90	1716.70	31-Jul-25	-7.21%
UPL	681.30	678.90	31-Jul-25	-4.76%
BHARTIARTL	2017.20	2010.80	31-Jul-25	-4.29%
ULTRACEMCO	12506.00	12477.00	31-Jul-25	-3.13%
PIDILITIND	3080.20	3073.70	31-Jul-25	-2.85%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	45288975	38228625	1.18

(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. BLUESTARCO	2. KALYANKJIL	3. AMBER	4. DIXON	5. VOLTAS
6. ASIANPAINT	7. LODHA	8. BRIGADE	9. PRESTIGE	10. OBEROIRLTY
11. GODREJPROP	12. PHOENIXLTD			

(Source: [Moneycontrol](#))

DISCLAIMER

This document has been prepared by Shriram Insight Share Brokers Ltd. and is meant for sole use by the recipient and not for circulation. This document is not to be reported or copied or made available to others. The information contained herein is from sources believed reliable. It should not be considered as an offer to sell or a solicitation to buy any security or as an official confirmation of any transaction. We do not represent that it is accurate or complete and it should not be relied upon as such. This document is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision. The investments discussed or recommended in this report may not be suitable for all investors. Shriram Insight Share Brokers Ltd. Stock Recommendation Service is a general recommendation service and is not to be construed as an individual investor-specific Portfolio Management and Advisory Service.

The user assumes the entire risk of any use made of this information. Each recipient of this document should arrive at an independent evaluation of an investment in the securities of companies referred to in this document and should consult their own advisors to determine the merits and risks of such an investment.

Shriram Insight Share Brokers Ltd. shall not be responsible for any loss or liability incurred to the user as a consequence of his or any other person on his behalf taking any investment decisions based on the information, recommendations, research reports, analysis, quotes, etc. provided on the web site.

Shriram Insight Share Brokers Ltd shall not be liable for errors, omissions or typographical errors, disruption delay, interruption, failure, deletion or defect of/in the Service provided by it.

All Users of the Service in countries other than India understand that by using the Service, they may be violating the local laws in such countries. If the User chooses to access the Service from outside India, he shall be responsible for compliance with foreign and local laws.

EQUITIES | DERIVATIVES | COMMODITIES | DP SERVICES | MUTUAL FUNDS | RESEARCH

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 | www.shriraminsight.com |