

Market Snapshot

KEY INDICES	05-Jun-26	29-May-26	05-Sep-25
S&P CNX NIFTY	23366.70	23547.75	-0.77
SENSEX	74243.34	74775.74	-0.71
NIFTY MIDCAP 100	60754.90	61723.80	-1.57
NIFTY SMLCAP 100	18110.30	18138.80	-0.16

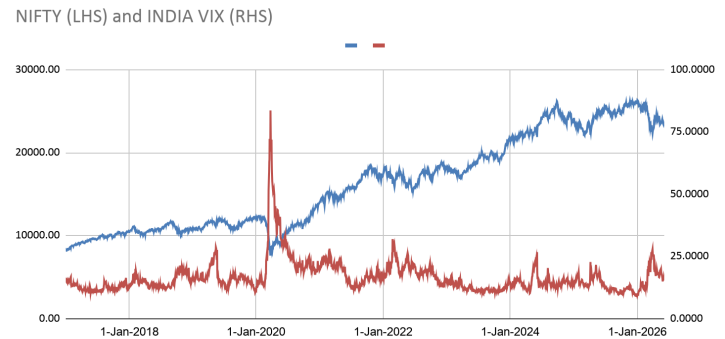
(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	05-Jun-26	29-May-26	%Ch
NIFTY BANK	54496.25	54239.20	0.47
NIFTY AUTO	26165.95	26338.45	-0.65
NIFTY FMCG	48302.45	49383.35	-2.19
NIFTY IT	29010.30	29080.15	-0.24
NIFTY METAL	13221.65	13440.95	-1.63
NIFTY PHARMA	24248.05	24345.80	-0.40
NIFTY REALTY	768.90	782.55	-1.74
BSE CG	80010.94	80818.74	-1.00
BSE CD	58654.45	57685.96	1.68
BSE Oil & GAS	26555.57	26741.03	-0.69
BSE POWER	8135.27	8383.10	-2.96

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

Nifty Vs. INDIA VIX



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

Market ends week lower amid RBI caution and global uncertainties

Indian equity markets ended the week with losses. The Sensex and Nifty both declined due to concerns over geopolitical tensions, uncertainties in global trade, and the RBI's updated inflation forecast. However, broader markets performed better than the main indices, supported by gains in specific stocks linked to strong quarterly earnings, major order wins, and positive corporate news. Sentiment improved thanks to solid domestic economic indicators, including stronger GDP growth, better manufacturing and services activity, robust industrial production, and healthy GST collections. The RBI kept the policy rate steady but raised its inflation forecast and lowered its growth projections for FY27, reflecting increased uncertainty from global events. Meanwhile, global signals were mixed. Stronger-than-expected manufacturing activity in China was countered by a downturn in the Eurozone economy and rising inflation in that region. Despite some volatility, strong domestic fundamentals, on-going policy support, and steady institutional involvement helped cushion the losses throughout the week.

FII & DII Activities (Rs Crore)

29/05/2026 to 05/06/2026

Activities	FIIs	DIIIs
Buy	175472.66	131868.43
Sell	216894.13	81171.24
Net	-41421.47	50697.19

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
TITAN	4260.00	4074.65	4.55
INFY	1197.00	1159.75	3.21
SBIN	977.75	964.00	1.43
TMPV	397.65	393.25	1.12
ASIANPAINT	2685.15	2672.10	0.49

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
NTPC	361.65	386.75	-6.49
ULTRACEMCO	10910.75	11449.30	-4.70
BAJAJFINSV	1703.10	1784.65	-4.57
LT	3953.95	4076.65	-3.01
WIPRO	198.35	204.20	-2.86

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
TITAN	4260.20	4074.90	4.55
INFY	1197.50	1160.90	3.15
COALINDIA	472.30	457.90	3.14
GAIL	167.40	164.51	1.76
SBIN	977.70	964.40	1.38

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
NTPC	361.65	386.90	-6.53
ULTRACEMCO	10912.00	11482.00	-4.96
SHREECEM	24085.00	25275.00	-4.71
BAJAJFINSV	1703.20	1783.60	-4.51
HDFCLIFE	575.30	594.80	-3.28

(Source: Capitaline)

In the week ended on Friday, 08 May 2026, the S&P BSE Sensex declined 532.4 points or 0.71% to settle at 74,243.34. The Nifty 50 index fell 181.05 points or 0.77% to settle at 23,366.70. The BSE 150 Mid-Cap index gained 1.14% to close at 16,298.76. The BSE 250 Small-Cap jumped 0.23% to end at 6,785.68.

RBI MPC Outcome:

The MPC, chaired by RBI Governor Sanjay Malhotra, unanimously voted to maintain the repo rate under the liquidity adjustment facility (LAF) at 5.25%. Accordingly, the standing deposit facility (SDF) rate remains at 5%, while the marginal standing facility (MSF) rate and the bank rate continue at 5.50%.

Taking these factors into account, the RBI revised its FY27 real GDP growth forecast to 6.6% from 6.9% projected earlier. Growth is now estimated at 6.6% in Q1, 6.3% in Q2, 6.5% in Q3 and 6.8% in Q4.

CPI inflation for FY27 has been projected at 5.1%, compared with the earlier estimate of 4.6%. Quarterly inflation is expected at 4.2% in Q1, 5.1% in Q2, 5.9% in Q3 and 5.4% in Q4, while core inflation is projected at 4.7% for the year.

The RBI highlighted that elevated energy prices, global supply constraints, a weaker monsoon outlook and the risk of El Niño have increased inflation uncertainties.

India's economy grew at a higher pace of 7.7% during 2025-26 as compared to 7.1% in 2024-25.

India's HSBC India Manufacturing PMI rose to 55.0, up from 54.7 in April and the flash reading of 54.3,.

India's Gross GST collections rose 3.2% to over Rs 1.94 lakh crore in May. Gross GST collection stood at Rs 1.88 lakh crore in May, 2025.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
ZEEL	112.27	93.11	20.58
TTML	46.16	42.81	7.83
IPCALAB	1641.90	1524.40	7.71
IDEA	14.95	13.99	6.86
LAURUSLABS	1446.80	1362.00	6.23

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	05-Jun-26	29-May-26	%Ch
HINDZINC	566.80	632.95	-10.45
POLICYBZR	1534.10	1702.50	-9.89
PATANJALI	420.45	456.20	-7.84
BHEL	386.95	416.75	-7.15
ABFRL	60.09	64.61	-7.00

(Source: Capitaline)

World Markets

KEY INDICES	05-Jun-26	29-May-26	%Ch
DJIA	50866.78	51032.46	-0.32
NASDAQ	25709.43	26972.62	-4.68
BOVESPA	169019.12	173787.48	-2.74
FTSE 100	10368.05	10409.28	-0.40
CAC 40	8218.24	8183.34	0.43
DAX	24759.05	25104.70	-1.38
MOEX RUSSIA	2561.04	2565.61	-0.18
NIKKEI 225	66588.12	66329.50	0.39
HANG SENG	24961.95	25182.39	-0.88
STRAITS TIMES	5049.96	5037.86	0.24
SHANGHAI COMPOSITE	4027.74	4068.57	-1.00
JAKARTA	5594.77	6127.38	-8.69

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

India's factory output, measured by the Index of Industrial Production (IIP), rose 4.9% in April 2026, up from 3.2% in March. Manufacturing output grew 6.2%, while electricity and gas supply rose 4.9%. Water supply, sewerage and waste management expanded 6.6%. However, mining and quarrying output contracted 5.1%.

The HSBC India Services PMI was revised higher to 59.8 in May 2026 from 58.8 in April.

Global Markets:

China's RatingDog China General Manufacturing Purchasing Managers' Index, compiled by S&P Global, rose to 51.8, slightly above market expectations of 51.6.

The US economy is expected to have added 85,000 jobs in May 2026, with the unemployment rate seen holding steady at 4.3%.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor upcoming Q4 earnings reports, weaker monsoon expectation, movement in crude oil and gold prices and the US stance on the West Asia conflict. 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 23262, 23155, 23028, 22182 while levels of 23495, 23623, 23729, 24852 may act as resistance with pivot point at 23389.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	30-Jun-26	23440.00	23740.00	-1.26%	73.30	779672	688223	13.29%
BANKNIFTY	30-Jun-26	54799.00	54770.00	0.05%	302.75	167064	168888	-1.08%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
CONCOR	450.95	454.80	30-Jun-26	12.46%
GLENMARK	2166.20	2184.00	30-Jun-26	12.00%
EXIDEIND	399.55	402.80	30-Jun-26	11.88%
IDEA	14.95	15.07	30-Jun-26	11.72%
DABUR	424.15	427.50	30-Jun-26	11.53%
BIOCON	412.30	415.55	30-Jun-26	11.51%
NTPC	361.65	364.50	30-Jun-26	11.51%
CUMMINSIND	5784.00	5829.00	30-Jun-26	11.36%
ICICIPRULI	483.25	487.00	30-Jun-26	11.33%
IDFCFIRSTB	72.35	72.91	30-Jun-26	11.30%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	198.37	183.93	30-Jun-26	-106.28%
TATASTEEL	206.77	204.40	30-Jun-26	-16.73%
BAJAJ-AUTO	10342.00	10248.00	30-Jun-26	-13.27%
HDFCBANK	747.05	740.60	30-Jun-26	-12.61%
ASIANPAINT	2686.70	2673.40	30-Jun-26	-7.23%
HINDUNILVR	2121.50	2111.00	30-Jun-26	-7.23%
PETRONET	269.45	268.50	30-Jun-26	-5.15%
VOLTAS	1298.30	1294.20	30-Jun-26	-4.61%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	67535220	65352020	1.03

(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. KALYANKJIL	2. TITAN	3. VOLTAS	4. BHEL	5. NTPC
6. ENRIN	7. NHPC	8. ADANIPOWER	9. POWERINDIA	10. SIEMENS
11. SUZLON	12. THERMAX			

(Source: [Moneycontrol](#))

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