

Market Snapshot

KEY INDICES	05-Sep-25	29-Aug-25	%Ch
S&P CNX NIFTY	24741.00	24426.85	1.29
SENSEX	80710.76	79809.65	1.13
NIFTY MIDCAP 100	57075.20	55727.40	2.42
NIFTY SMLCAP 100	17655.25	17227.00	2.49

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

Sectoral Snapshot

KEY INDICES	05-Sep-25	29-Aug-25	%Ch
NIFTY BANK	54114.55	53655.65	0.86
NIFTY AUTO	26320.60	24960.85	5.45
NIFTY FMCG	56292.10	56141.85	0.27
NIFTY IT	34635.85	35181.25	-1.55
NIFTY METAL	9681.65	9154.80	5.75
NIFTY PHARMA	21924.80	21804.05	0.55
NIFTY REALTY	872.50	870.75	0.20
BSE CG	66852.58	65417.08	2.19
BSE CD	62399.45	60638.17	2.90
BSE Oil & GAS	25842.48	25540.00	1.18
BSE POWER	6541.74	6392.75	2.33

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

FII & DII Activities (Rs Crore)

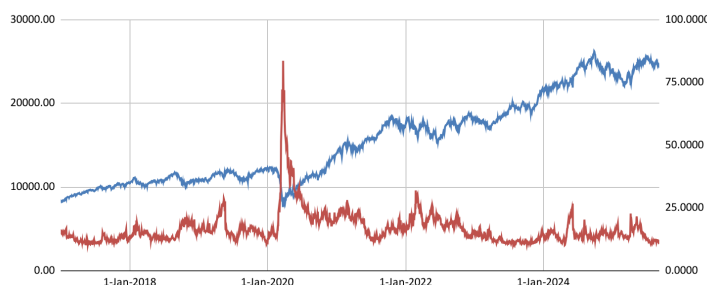
29/08/2025 to 05/09/2025

Activities	FIIs	DIIIs
Buy	62136.03	88951.37
Sell	80481.19	64019.64
Net	-18345.16	24931.73

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Barometers end with significant gains; Nifty closes above 24,700 level

The stock market ended the week on a positive note, with the Nifty closing above 24,700 and the Sensex above 80,700. The rise was mainly because of strong economic data, like a 7.8% jump in GDP and higher PMI numbers, showing steady growth in manufacturing and services. Investors also felt more confident after the government cut GST rates on basic goods, two-wheelers, and school items to help increase spending. Markets went up earlier in the week after the good news, and mid-week gains were helped by strong services growth. But towards the end of the week, some global worries and profit booking made investors more careful.

In the week ended on Friday, 5 September 2025, the S&P BSE Sensex rallied 901.11 points or 1.12% to settle at 80,710.76. The Nifty 50 index jumped 314.15 points or 1.28% to settle at 24,741. The BSE Mid-Cap index shed 0.10% to close at 45,459.77. The BSE Small-Cap rose 0.09% to end at 52,752.31.

The seasonally adjusted HSBC India Manufacturing PMI stood at 59.3 in August compared with 59.1 in July 2025. The

Sensex Gainers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
M&M	3561.55	3198.15	11.36
TATASTEEL	167.65	154.45	8.55
BAJFINANCE	937.65	877.80	6.82
BAJAJFINSV	2014.10	1912.45	5.32
NESTLEIND	1209.70	1155.60	4.68

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
HCLTECH	1419.55	1455.45	-2.47
WIPRO	243.80	249.25	-2.19
INFY	1444.35	1469.45	-1.71
LT	3552.75	3599.85	-1.31
TCS	3048.45	3084.40	-1.17

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
M&M	3561.30	3199.50	11.31
TATASTEEL	167.68	154.48	8.54
EICHERMOT	6580.50	6103.00	7.82
BAJFINANCE	937.60	877.85	6.81
HINDALCO	743.80	703.95	5.66

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
UPL	688.85	715.75	-3.76
HCLTECH	1419.00	1454.80	-2.46
WIPRO	243.67	249.41	-2.30
CIPLA	1553.40	1589.40	-2.27
DIVISLAB	6009.00	6131.50	-2.00

(Source: Capitaline)

services PMI Business Activity Index was up from 60.5 in July to 62.9 in August. Subsequently, the composite PMI Output Index rose from 61.1 in July to 63.2 in August.

Gross domestic product (GDP) grew 7.8% in the quarter, the strongest pace in five quarters, compared with 7.4% in the previous three-month period, according to government data released Friday.

India collected 1.86 trillion rupees (\$21.26 billion) as goods and services tax in August, 6.5% higher than the same period last year, the government said on Monday.

GST Reforms:

The GST Council approved the significant rate cuts on several essential items. Effective from September 22nd, the new rates aim to boost consumption by shifting to a two-slab structure of 5% and 18%, abolishing the 12% and 28% rates. A special 40% GST slab has been introduced for super luxury and sin goods.

In a major relief to the automobile and two-wheeler sector, GST on small cars and motorcycles with engine capacity up to 350cc has been reduced from 28% to 18%, a move aimed at boosting demand in the mass mobility segment. Additionally, parts and accessories of motorcycles up to 350cc will now attract 18% GST instead of 28%. On the other hand, the levy on premium motorcycles exceeding 350cc has been sharply raised from 28% to 40%, making high-end bikes costlier.

The GST Council exempted individual life and health insurance policies from the 18% Goods and Services Tax (GST).

Several fast-moving consumer goods (FMCG) currently taxed at 12% or 18% will now fall under the 5% bracket. Further, GST on tractors (except road tractors for semi-trailers above 1800cc) has been reduced to 5% from 12%. For road tractors with engines above 1800cc, the tax was lowered to 18%

Nifty Midcap 100 Gainers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
BATAINDIA	1242.10	1098.10	13.11
IDEA	7.23	6.49	11.40
ABFRL	85.92	77.35	11.08
JINDALSTEL	1034.85	945.80	9.42
SAIL	129.26	118.66	8.93

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	05-Sep-25	29-Aug-25	%Ch
HONEYWELL	35400.00	38740.00	-8.62
COFORGE	1658.30	1724.30	-3.83
IPCALAB	1335.00	1384.40	-3.57
AUBANK	694.30	718.05	-3.31
PRESTIGE	1510.50	1561.80	-3.28

(Source: Capitaline)

World Markets

KEY INDICES	05-Sep-25	29-Aug-25	%Ch
DJIA	45400.86	45544.88	-0.32
NASDAQ	21700.39	21455.55	1.14
BOVESPA	142640.00	141422.27	0.86
FTSE 100	9208.21	9187.34	0.23
CAC 40	7674.78	7703.90	-0.38
DAX	23596.98	23902.21	-1.28
MOEX RUSSIA	2901.45	2899.38	0.07
NIKKEI 225	43018.75	42718.47	0.70
HANG SENG	25417.98	25077.62	1.36
STRAITS TIMES	4307.08	4269.70	0.88
SHANGHAI COMPOSITE	3812.51	3857.93	-1.18
JAKARTA	CLOSED	7830.49	-

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

from 28%. Additionally, GST on tractor tyres and parts was slashed from 18% to 5%.

In education segment, the council reduced GST on pencils, crayons, pastels, drawing charcoal, chalk sticks, and tailor's chalk from 12% to nil. Exercise books, graph books, laboratory notebooks, and notebooks too have been exempted from GST, compared with 12% earlier. Additionally, boxes, pouches, wallets, and writing compendiums of paper or paperboard containing assorted stationery will now attract 5% GST instead of 12%.

Global Markets:

China's RatingDog Manufacturing PMI at 50.5 in August, recovering from July's contraction of 49.5. However, NBS manufacturing PMI at 49.4 in August, marginally up from July's 49.3, still indicating slight contraction.

In U.S. initial claims for state unemployment benefits rose by 8,000 to a seasonally adjusted 237,000 for the week ending August 30, according to the US Labor Department.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. 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 24632, 24521, 24421, 24251 while levels of 24842, 24943, 25053, 25202 may act as resistance with pivot point at 24732.

(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-Sep-25	24849.60	24577.30	1.11%	108.60	683910	664404	2.94%
BANKNIFTY	30-Sep-25	54347.60	54100.00	0.46%	233.05	187656	187539	0.06%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	7.23	7.28	30-Sep-25	10.10%
TATAMOTORS	691.70	696.00	30-Sep-25	9.08%
CONCOR	542.25	545.30	30-Sep-25	8.21%
DLF	755.55	759.75	30-Sep-25	8.12%
BEL	370.80	372.85	30-Sep-25	8.07%
AXISBANK	1055.90	1061.70	30-Sep-25	8.02%
INDUSINDBK	757.05	761.20	30-Sep-25	8.00%
LICHSGFIN	554.20	557.20	30-Sep-25	7.90%
VEDL	445.50	447.90	30-Sep-25	7.87%
BANKBARODA	234.26	235.52	30-Sep-25	7.85%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
NATIONALUM	212.14	210.59	30-Sep-25	-10.67%
SAIL	129.26	128.34	30-Sep-25	-10.39%
CHOLAFIN	1490.90	1482.90	30-Sep-25	-7.83%
UPL	688.85	685.20	30-Sep-25	-7.74%
DRREDDY	1268.10	1263.10	30-Sep-25	-5.76%
VOLTAS	1432.80	1427.60	30-Sep-25	-5.30%
IGL	213.03	212.39	30-Sep-25	-4.39%
HEROMOTOCO	5363.00	5350.00	30-Sep-25	-3.54%
CUMMINSIND	3936.80	3929.80	30-Sep-25	-2.60%
BHARATFORG	1136.70	1135.40	30-Sep-25	-1.67%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	50537400	46413300	1.09

(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. NATIONALUM	2. JINDALSTEL	3. SAIL	4. TATASTEEL	5. NMDC
6. HINDCOPPER	7. VEDL	8. HINDALCO	9. HINDZINC	10. JSWSTEEL
11. COFORGE	12. PERSISTENT	13. HCLTECH	14. WIPRO	

(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 |