

## Market Snapshot

KEY INDICES	05-Dec-25	28-Nov-25	05-Sep-25
S&P CNX NIFTY	26186.45	26202.95	-0.06
SENSEX	85712.37	85706.67	0.01
NIFTY MIDCAP 100	60594.60	61043.25	-0.73
NIFTY SMLCAP 100	17507.75	17829.25	-1.80

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

## Sectoral Snapshot

KEY INDICES	05-Dec-25	28-Nov-25	%Ch
NIFTY BANK	59777.20	59752.70	0.04
NIFTY AUTO	27939.10	27774.60	0.59
NIFTY FMCG	55202.85	55595.80	-0.71
NIFTY IT	38703.65	37405.50	3.47
NIFTY METAL	10340.35	10293.05	0.46
NIFTY PHARMA	22947.15	22998.30	-0.22
NIFTY REALTY	893.15	903.15	-1.11
BSE CG	67647.37	69208.59	-2.26
BSE CD	60828.52	61868.22	-1.68
BSE Oil & GAS	27947.46	28207.28	-0.92
BSE POWER	6501.06	6613.14	-1.69

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

## FII & DII Activities (Rs Crore)

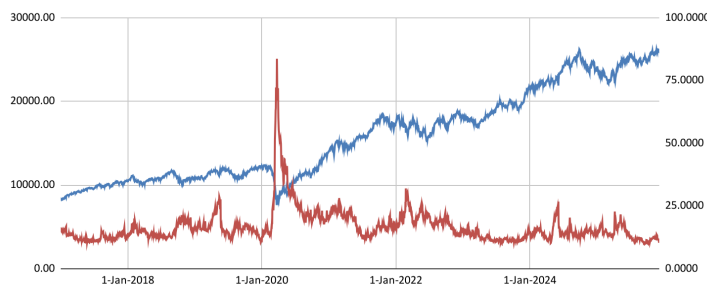
28/11/2025 to 05/12/2025

Activities	FIIs	DIIIs
Buy	74879.96	92582.17
Sell	87203.61	68648.19
Net	-12323.65	23933.98

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Market ends flat as broader market faces selling pressure

Domestic equities ended the week on a muted note, with the frontline indices closing almost flat despite notable intra-week volatility. The market remained under pressure for three out of the five sessions, weighed down by a weakening rupee, persistent FII outflows and caution ahead of the RBI's monetary policy decision. Sentiment was subdued early in the week as the Sensex and Nifty retreated from record highs amid concerns over foreign outflows, a heavy IPO pipeline and uncertainty around India-US trade negotiations.

Conditions worsened mid-week as the rupee slipped to fresh lows, but markets stabilized on Thursday and rebounded sharply on Friday after the RBI delivered a 25-basis-point repo rate cut, helping lift investor sentiment despite mixed global cues.

In the week ended on Friday, 05 December 2025, the S&P BSE Sensex rose marginally 5.70 points or 0.01% to settle at 85,712.37. The Nifty 50 index added 16.50 points or 0.06% to settle at 26,186.45. The BSE Mid-Cap index fell 1.25% to

## Sensex Gainers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
HINDUNILVR	2426.71	2339.00	<b>3.75</b>
TITAN	3908.95	3814.30	<b>2.48</b>
RELIANCE	1566.85	1540.90	<b>1.68</b>
SUNPHARMA	1831.25	1804.95	<b>1.46</b>
M&M	3757.80	3716.45	<b>1.11</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
WIPRO	249.45	260.00	<b>-4.06</b>
INFY	1559.70	1615.95	<b>-3.48</b>
TECHM	1516.85	1569.85	<b>-3.38</b>
HCLTECH	1627.75	1682.85	<b>-3.27</b>
ASIANPAINT	2873.40	2967.15	<b>-3.16</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
HINDUNILVR	2426.32	2338.60	<b>3.75</b>
GAIL	176.09	169.98	<b>3.59</b>
TITAN	3907.70	3813.30	<b>2.48</b>
RELIANCE	1567.50	1540.60	<b>1.75</b>
SUNPHARMA	1831.60	1805.30	<b>1.46</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
WIPRO	249.53	259.91	<b>-3.99</b>
HCLTECH	1624.20	1683.00	<b>-3.49</b>
INFY	1560.10	1616.20	<b>-3.47</b>
TECHM	1517.30	1570.80	<b>-3.41</b>
ASIANPAINT	2874.40	2968.50	<b>-3.17</b>

(Source: Capitaline)

close at 46,617.80. The BSE Small-Cap index dropped 1.84% at 51,093.23.

The Reserve Bank of India Governor Sanjay Malhotra, announcing the fifth bi-monthly policy review of FY26 said that RBI's MPC has unanimously decided to reduce the policy repo rate by 25 basis points to 5.25%, keeping its stance neutral. The MPC voted unanimously to reduce the rate under the liquidity adjustment facility, which also revised the standing deposit facility (SDF) rate to 5% and the marginal standing facility (MSF) and Bank Rate to 5.50%, while maintaining a neutral stance.

The RBI raised its real GDP growth forecast for FY26 to 7.3% from 6.8% earlier, expecting 7% growth in Q3 and 6.5% in Q4. For Q1 and Q2 FY27, growth is projected at 6.7% and 6.8%, respectively. The CPI inflation forecast for FY26 was lowered to 2% from 2.6%, with expectations of 0.6% in Q3 and 2.9% in Q4. CPI for Q1 and Q2 FY27 is projected at 3.9% and 4%.

Fitch Ratings revised India's GDP growth forecast for FY26 to 7.4%, from 6.9% projected earlier.

India's industrial production growth slipped to a 14-month low of 0.4% in October, down sharply from 4.6% in the previous month.

The seasonally adjusted HSBC India Manufacturing PMI fell to 56.6 in November from 59.2 in October. The seasonally adjusted HSBC India Services PMI Business Activity Index rose from 58.9 in October to 59.8 in November.

India's gross GST revenue stood at Rs 1,70,276 crore in November 2025, a 0.7% increase over the Rs 1,69,016 crore collected in the same month last year. For the April-November period, gross GST collections climbed to Rs 14,75,488 crore, reflecting a healthy 8.9% year-on-year growth.

India's GDP grew 8.2% in Q2 FY26, the fastest pace in six quarters, driven by strong manufacturing and services

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
WHIRLPOOL	1072.10	949.50	<b>12.91</b>
INDIANB	870.25	808.95	<b>7.58</b>
BHANDHANBNK	150.36	140.08	<b>7.34</b>
DIXON	14601.00	13749.00	<b>6.20</b>
MAXHEALTH	1162.80	1097.40	<b>5.96</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	05-Dec-25	28-Nov-25	%Ch
IDEA	9.96	10.80	<b>-7.78</b>
MPHASIS	2811.40	2953.60	<b>-4.81</b>
POLICYBZR	1818.90	1893.80	<b>-3.96</b>
TVSMOTOR	3531.50	3665.40	<b>-3.65</b>
COFORGE	1908.70	1977.90	<b>-3.50</b>

(Source: Capitaline)

## World Markets

KEY INDICES	05-Dec-25	28-Nov-25	%Ch
DJIA	47954.99	47716.42	<b>0.50</b>
NASDAQ	23578.13	23365.69	<b>0.91</b>
BOVESPA	157369.36	159072.12	<b>-1.07</b>
FTSE 100	9667.01	9720.51	<b>-0.55</b>
CAC 40	8114.74	8122.71	<b>-0.10</b>
DAX	24028.14	23836.79	<b>0.80</b>
MOEX RUSSIA	2711.30	2676.42	<b>1.30</b>
NIKKEI 225	50491.87	50253.91	<b>0.47</b>
HANG SENG	26085.08	25858.89	<b>0.87</b>
STRAITS TIMES	4531.36	4523.96	<b>0.16</b>
SHANGHAI COMPOSITE	3902.81	3888.60	<b>0.37</b>
JAKARTA	8632.76	8508.71	<b>1.46</b>

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

performance. This compares with 5.6% in the same period last year and 7.8% in Q1, taking first-half growth for FY26 to 8%.

India's current account deficit moderated to \$12.3 billion (1.3% of GDP) in Q2:2025-26 from \$20.8 billion (2.2% of GDP) in Q2:2024-25, the RBI said on Monday.

### Global Markets:

China's factory activity unexpectedly contracted in November, according to a private survey released Monday, as soft domestic demand continued to cast a pall over the world's second-largest economy.

The U.S. fresh labour data added to the uncertainty. Weekly jobless claims fell sharply by 27,000 to a seasonally adjusted 191,000, the lowest since September 2022, though holiday-related distortions may have amplified the decline. Earlier in the week, ADP reported a 32,000 drop in private-sector payrolls, the steepest fall in more than two and a half years.

(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 26047, 25908, 25830, 25782 while levels of 26265, 26342, 26482, 26552 may act as resistance with pivot point at 26125.

(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-Dec-25	26189.00	26396.00	-0.78%	155.25	603939	544764	10.86%
BANKNIFTY	30-Dec-25	60080.00	60082.40	0.00%	302.80	98908	105016	-5.82%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HINDUNILVR	2338.60	2462.80	30-Dec-25	77.54%
BANDHANBNK	140.08	146.80	30-Dec-25	70.04%
PETRONET	274.80	282.50	30-Dec-25	40.91%
SHREECEM	26075.00	26535.00	30-Dec-25	25.76%
INDIGO	5370.50	5461.00	30-Dec-25	24.60%
VEDL	524.50	532.85	30-Dec-25	23.24%
LICHSGFIN	541.80	550.40	30-Dec-25	23.17%
SIEMENS	3325.90	3375.40	30-Dec-25	21.73%
TORNTPOWER	1289.90	1307.20	30-Dec-25	19.58%
AMBUJACEM	533.80	540.35	30-Dec-25	17.91%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
MARICO	736.65	717.15	30-Dec-25	-38.65%
CHOLAFIN	1730.40	1685.80	30-Dec-25	-37.63%
MUTHOOTFIN	3800.10	3711.30	30-Dec-25	-34.12%
SBIN	971.50	954.10	30-Dec-25	-26.15%
BAJAJFINSV	2096.50	2059.10	30-Dec-25	-26.05%
ADANIENT	2265.40	2225.50	30-Dec-25	-25.71%
RBLBANK	305.80	300.45	30-Dec-25	-25.54%
MANAPPURAM	279.70	275.30	30-Dec-25	-22.97%
BAJFINANCE	1048.00	1032.50	30-Dec-25	-21.59%
PNB	121.71	120.20	30-Dec-25	-18.11%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	61120225	53710950	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. MPHASIS	2. WIPRO	3. COFORGE	4. HCLTECH	5. INFY
6. TECHM	7. TCS	8. LTIM	9. PERSISTENT	10. PTC
11. TRITURBINE	12. ASTRAL			

(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](mailto:helpdesk@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |