

## Market Snapshot

KEY INDICES	08-Aug-25	01-Aug-25	%Ch
S&P CNX NIFTY	24363.30	24565.35	-0.82
SENSEX	79857.79	80599.91	-0.92
NIFTY MIDCAP 100	56002.20	56637.15	-1.12
NIFTY SMLCAP 100	17428.20	17668.20	-1.36

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

## Sectoral Snapshot

KEY INDICES	08-Aug-25	01-Aug-25	%Ch
NIFTY BANK	55004.90	55617.60	-1.10
NIFTY AUTO	23474.65	23410.95	0.27
NIFTY FMCG	54900.95	56197.05	-2.31
NIFTY IT	34398.50	34649.60	-0.72
NIFTY METAL	9147.10	9102.35	0.49
NIFTY PHARMA	21402.15	22011.70	-2.77
NIFTY REALTY	874.15	896.15	-2.45
BSE CG	66751.26	67850.22	-1.62
BSE CD	59029.25	59183.30	-0.26
BSE Oil & GAS	26029.19	26283.87	-0.97
BSE POWER	6573.23	6668.03	-1.42

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

## FII & DII Activities (Rs Crore)

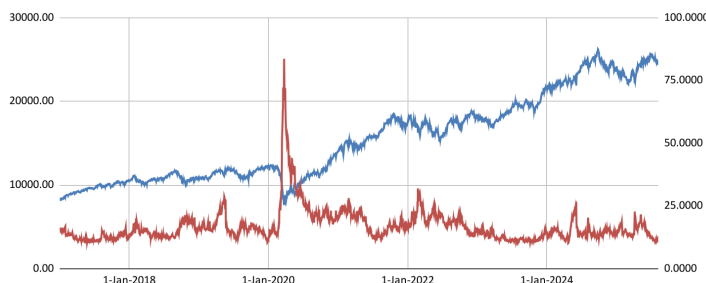
01/08/2025 to 08/08/2025

Activities	FIIs	DIIIs
Buy	76594.36	96381.90
Sell	94517.86	59586.38
Net	-17923.50	36795.52

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Market slumps for 6th straight week on Trump Tariff shock

The domestic equity benchmarks ended the week with major losses, weighed down by renewed global trade tensions after President Trump announced a doubling of U.S. tariffs on Indian goods, sparking concerns over a potential export impact. The Reserve Bank of India's decision to keep interest rates unchanged, along with its neutral policy stance, failed to boost investor sentiment amid persistent foreign portfolio outflows. Additionally, weak Q1 earnings from several major companies further dampened market morale. The overall tone remained cautious. Notably, the broader market underperformed, adding to the week's bearish undertone.

In the week ended on Friday, 08 August 2025, the S&P BSE Sensex declined 742.12 points or 0.92% to settle at 79,857.79. The Nifty 50 index slipped 202.05 points or 0.82% to settle at 24,363.30. The BSE Mid-Cap index fell 1.29% to close at 44,570.89. The BSE Small-Cap index dropped 1.86% to end at 51,596.97.

Banking stocks edged lower after the Reserve Bank of India's Monetary Policy Committee (MPC) unanimously

## Sensex Gainers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
<b>TITAN</b>	3460.40	3315.00	<b>4.39</b>
<b>TATASTEEL</b>	158.00	153.00	<b>3.27</b>
<b>TECHM</b>	1479.80	1439.00	<b>2.84</b>
<b>MARUTI</b>	12578.90	12299.35	<b>2.27</b>
<b>ASIANPAINT</b>	2475.40	2429.45	<b>1.89</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
<b>NESTLEIND</b>	1097.40	2275.95	<b>-51.78</b>
<b>INFY</b>	1423.65	1470.60	<b>-3.19</b>
<b>SUNPHARMA</b>	1586.70	1629.05	<b>-2.60</b>
<b>TATAMOTORS</b>	633.30	648.75	<b>-2.38</b>
<b>ICICIBANK</b>	1436.45	1471.40	<b>-2.38</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
<b>HEROMOTOCO</b>	4599.80	4311.60	<b>6.68</b>
<b>TITAN</b>	3460.20	3316.00	<b>4.35</b>
<b>UPL</b>	688.75	665.15	<b>3.55</b>
<b>TATASTEEL</b>	157.95	153.01	<b>3.23</b>
<b>TECHM</b>	1480.40	1438.80	<b>2.89</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
<b>NESTLEIND</b>	1096.50	2276.50	<b>-51.83</b>
<b>BRITANNIA</b>	5387.00	5798.00	<b>-7.09</b>
<b>DIVISLAB</b>	5914.50	6361.50	<b>-7.03</b>
<b>INFY</b>	1423.10	1469.60	<b>-3.16</b>
<b>SUNPHARMA</b>	1586.90	1629.70	<b>-2.63</b>

(Source: Capitaline)

decided to keep the policy repo rate unchanged at 5.5% in its latest review, concluding on 6 August 2025.

The central bank retained its real GDP growth forecast for FY26 at 6.5%, with quarterly projections of 6.5% in Q1, 6.7% in Q2, 6.6% in Q3, and 6.3% in Q4. For Q1 FY27, growth is projected at 6.6%, with risks broadly balanced.

On inflation, the RBI lowered its CPI forecast for FY26 to 3.1%, down from the earlier 3.7%. Quarterly inflation is now seen at 2.1% in Q2, 3.1% in Q3, and 4.4% in Q4. CPI inflation for Q1 FY27 is projected at 4.9%. The central bank noted that average inflation this year is expected to remain well below the target, largely due to easing food prices, although inflation may edge above the 4% mark from Q4 onwards.

The RBI highlighted that the full impact of the 100 basis points of rate cuts since February 2025 is still unfolding. Given the current macroeconomic conditions and external risks, the MPC decided to maintain the existing rate and continue with a neutral stance. It also signaled continued data monitoring to guide future policy moves. The minutes of the meeting will be released on August 20, while the next MPC meeting is scheduled from September 29 to October 1.

United States President Donald Trump announced an additional 25% tariff on Indian goods on August 6. This effectively doubles the total import duties to 50%. The decision responds to India's ongoing purchase of Russian oil, which the U.S. believes undermines its sanctions. The new tariffs will come into effect on August 27.

India said it was being 'targeted' by the U.S. and the European Union over its imports of Russian oil after U.S. President Donald Trump, in an overnight social media post, threatened New Delhi with much steeper tariffs.

India began importing oil from Russia only after traditional supplies were diverted to Europe following the outbreak of the Russia-Ukraine war in 2022, the Indian foreign ministry reportedly said in a statement.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
DELHIVERY	464.65	429.85	<b>8.10</b>
ABCAPITAL	271.80	251.45	<b>8.09</b>
CUMMINSIND	3806.90	3568.70	<b>6.67</b>
MFSL	1551.50	1472.50	<b>5.37</b>
INDIANB	650.85	621.20	<b>4.77</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	08-Aug-25	01-Aug-25	%Ch
BIOCON	343.35	383.10	<b>-10.38</b>
RAMCOCEM	1071.80	1151.10	<b>-6.89</b>
SYNGENE	655.25	703.25	<b>-6.83</b>
COROMANDEL	2420.10	2590.40	<b>-6.57</b>
HONAUT	36205.00	38725.00	<b>-6.51</b>

(Source: Capitaline)

The EU's bilateral trade with Russia stood at 67.5 billion euros (\$78.1 billion) in 2024, while its services trade in 2023 was at 17.2 billion euros.

The seasonally adjusted HSBC India Services PMI Business Activity Index edged up to 60.5 in July 2025 from 60.4 in June.

### Global Markets:

U.S. services sector activity unexpectedly flat lined in July, data showed on Tuesday. The Institute for Supply Management (ISM) said on Tuesday its nonmanufacturing purchasing managers index (PMI) slipped to 50.1 last month from 50.8 in June. The data indicated that the employment had weakened further and input costs climbed by the most in nearly three years, underscoring the impact from President Donald Trump's tariff policy.

(Source: Capitaline)

## Outlook and Technical View

Q1FY26 results to remain in focus. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Development in trade deals negotiations between 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 24273, 24181, 24025, 23952 while levels of 24521, 24677, 24769, 24870 may act as resistance with pivot point at 24429.

(Source: Capitaline)

## World Markets

KEY INDICES	08-Aug-25	01-Aug-25	%Ch
DJIA	44175.61	43588.58	<b>1.35</b>
NASDAQ	21450.02	20650.13	<b>3.87</b>
BOVESPA	135913.25	132437.39	<b>2.62</b>
FTSE 100	9095.73	9068.58	<b>0.30</b>
CAC 40	7743.00	7546.16	<b>2.61</b>
DAX	24162.86	23425.97	<b>3.15</b>
MOEX RUSSIA	2924.63	2727.98	<b>7.21</b>
NIKKEI 225	41820.48	40799.60	<b>2.50</b>
HANG SENG	24858.82	24507.81	<b>1.43</b>
STRAITS TIMES	4239.83	4153.83	<b>2.07</b>
SHANGHAI COMPOSITE	3635.13	3559.95	<b>2.11</b>
JAKARTA	7533.38	7537.77	<b>-0.06</b>

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

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Aug-25	24430.00	24618.00	-0.76%	66.70	689787	675618	2.10%
BANKNIFTY	28-Aug-25	55071.00	55796.40	-1.30%	66.10	193333	141174	36.95%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
RBLBANK	261.70	263.15	28-Aug-25	10.11%
BHARATFORG	1135.20	1141.20	28-Aug-25	9.65%
TATASTEEL	157.95	158.77	28-Aug-25	9.47%
AUROPHARMA	1042.10	1047.20	28-Aug-25	8.93%
SHREECEM	30415.00	30560.00	28-Aug-25	8.70%
AMBUJACEM	580.00	582.75	28-Aug-25	8.65%
JUBLFOOD	624.45	627.40	28-Aug-25	8.62%
IDEA	6.51	6.54	28-Aug-25	8.41%
BRITANNIA	5387.00	5411.50	28-Aug-25	8.30%
HDFCBANK	1973.90	1982.60	28-Aug-25	8.04%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	44865.00	44095.00	28-Aug-25	-31.32%
LICHSGFIN	570.60	562.90	28-Aug-25	-24.63%
NMDC	71.07	70.16	28-Aug-25	-23.37%
COALINDIA	379.70	375.70	28-Aug-25	-19.23%
PFC	404.65	401.75	28-Aug-25	-13.08%
HAVELLS	1491.60	1481.30	28-Aug-25	-12.60%
BANDHANBNK	165.19	164.08	28-Aug-25	-12.26%
VOLTAS	1304.90	1296.20	28-Aug-25	-12.17%
RECLTD	381.35	379.90	28-Aug-25	-6.94%
ICICIBANK	1435.90	1431.10	28-Aug-25	-6.10%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	41348400	44189925	<b>0.94</b>

(Source: Capitaline)

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

<b>1. NATIONALUM</b>	<b>2. TATASTEEL</b>	<b>3. JINDALSTEL</b>	<b>4. JSWSTEEL</b>	<b>5. VEDL</b>
<b>6. HINDZINC</b>	<b>7. BIOCON</b>	<b>8. DIVISLAB</b>	<b>9. IPCALAB</b>	<b>10. MANKIND</b>
<b>11. AUROPHARMA</b>	<b>12. AJANTPHARM</b>	<b>13. LAURUSLABS</b>	<b>14. TORNTPHARM</b>	<b>15. ALKEM</b>

(Source: [Moneycontrol](#))

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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) |