

## Market Snapshot

KEY INDICES	11-Jul-25	04-Jul-25	%Ch
S&P CNX NIFTY	25149.85	25461.00	-1.22
SENSEX	82500.47	83432.89	-1.12
NIFTY MIDCAP 100	58642.20	59677.75	-1.74
NIFTY SMLCAP 100	18763.45	19033.05	-1.42

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

## Sectoral Snapshot

KEY INDICES	11-Jul-25	04-Jul-25	%Ch
NIFTY BANK	56754.70	57031.90	-0.49
NIFTY AUTO	23493.80	23980.40	-2.03
NIFTY FMCG	55910.25	54735.60	2.15
NIFTY IT	37693.25	39166.55	-3.76
NIFTY METAL	9382.85	9580.40	-2.06
NIFTY PHARMA	22225.90	22384.60	-0.71
NIFTY REALTY	962.90	971.95	-0.93
BSE CG	70967.04	72322.41	-1.87
BSE CD	59491.08	61125.16	-2.67
BSE Oil & GAS	27802.96	28356.53	-1.95
BSE POWER	6890.22	6847.59	0.62

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

## FII & DII Activities (Rs Crore)

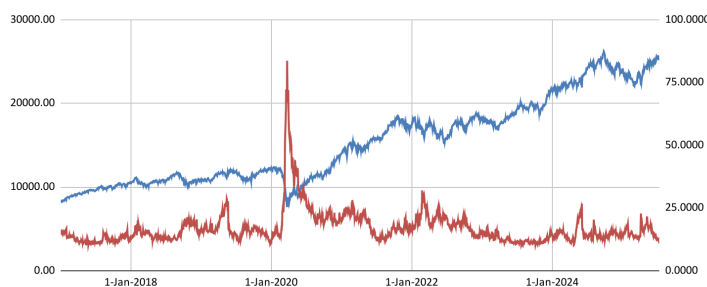
04/07/2025 to 11/07/2025

Activities	FIIs	DIIIs
Buy	69995.61	76257.96
Sell	67344.84	68995.80
Net	2650.77	7262.16

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Market slides for 2nd straight week amid tariff worries

The key equity indices ended lower for the week as investors turned cautious amid global trade uncertainties and the approaching Q1 earnings season. Sentiment was weighed down by lingering concerns over potential U.S. tariff actions, following President Donald Trump's announcement of fresh import duties on key trade partners. Caution also prevailed ahead of a possible breakthrough in U.S.-India trade talks, with market participants awaiting clarity on potential implications for key sectors.

In the week ended on Friday, 11 July 2025, the S&P BSE Sensex tanked 942.03 points or 1.11% to settle at 82,500.47. The Nifty 50 index slumped 311.15 points or 1.22% to settle at 25,149.85. The BSE Mid-Cap index shed 0.65% to close at 46,291.20. The BSE Small-Cap declined 0.70% to end at 54,484.40.

India's foreign exchange reserves rose by \$4.84 billion to \$702.78 billion in the week ended June 27, the Reserve Bank of India (RBI) said on Friday, July 4. Foreign currency assets surged by \$5.75 billion to \$594.82 billion. Gold reserves fell

## Sensex Gainers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
HINDUNILVR	2520.10	2339.80	<b>7.71</b>
KOTAKBANK	2219.80	2128.40	<b>4.29</b>
NTPC	342.55	335.50	<b>2.10</b>
POWERGRID	298.60	294.10	<b>1.53</b>
BAJAJFINSV	2016.45	1993.80	<b>1.14</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
TITAN	3358.95	3686.35	<b>-8.88</b>
HCLTECH	1637.00	1725.35	<b>-5.12</b>
BHARTIARTL	1921.90	2017.45	<b>-4.74</b>
TCS	3265.40	3420.95	<b>-4.55</b>
WIPRO	258.05	270.05	<b>-4.44</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
HINDUNILVR	2519.60	2339.30	<b>7.71</b>
KOTAKBANK	2220.60	2129.80	<b>4.26</b>
NTPC	342.70	335.50	<b>2.15</b>
SBILIFE	1835.20	1799.70	<b>1.97</b>
POWERGRID	298.55	294.00	<b>1.55</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
TITAN	3361.60	3686.90	<b>-8.82</b>
GAIL	181.89	193.41	<b>-5.96</b>
HCLTECH	1638.30	1725.90	<b>-5.08</b>
BHARTIARTL	1921.90	2017.20	<b>-4.72</b>
TCS	3266.00	3419.80	<b>-4.50</b>

(Source: Capitaline)

by \$1.23 billion to \$84.5 billion during the reported week, while special drawing rights (SDRs) rose by \$158 million to \$18.83 billion. India's reserve position with the International Monetary Fund (IMF) also increased by \$176 million to \$4.62 billion, central bank data showed.

Tata Consultancy Services (TCS) fell 4.54%. The IT giant reported a consolidated net profit of Rs 12,760 crore, marking a 6% year-on-year rise, while net margin stood firm at 20.1%. Revenue came in at Rs 63,437 crore, up 1.3% YoY in reported terms, although the company saw a 3.1% decline on a constant currency basis. Sequentially, the company managed to expand its operating margin by 30 basis points to 24.5%, signaling improved cost management. Cash generation remained robust with net cash from operations totaling Rs 12,804 crore, equaling 100.3% of net income. TCS also announced an interim dividend of Rs 11 per share. Its Q1 Total Contract Value (TCV) stood at \$9.4 billion.

Titan Company slumped 8.88%. The company released its business updates in Q1 of the current fiscal. Titan said that its domestic jewellery operations grew 18% YoY in the quarter, led by gold price volatility affecting consumer sentiments. Titan said buyer growth was flat on YoY basis for both TMZ brands (Tanishq, Mia, Zoya) and CaratLane.

Vedanta fell 3.54%. The US-based Viceroy Research said it has shorted the debt stack of Vedanta Resources (VRL), the parent company, describing it as a "financial zombie" kept alive by draining cash from its Indian subsidiary.

Vedanta has strongly refuted the allegations made in the Viceroy Research report, calling it a "malicious combination of selective misinformation and baseless allegations." The company claims the report was released without any attempt to reach out for clarification and is intended solely to create false propaganda and profit from market reaction.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
CUMMINSIND	3546.40	3342.00	6.12
DELHIVERY	411.25	390.10	5.42
PEL	1217.50	1157.90	5.15
MSUMI	63.41	60.32	5.12
PRESTIGE	1695.00	1613.00	5.08

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	11-Jul-25	04-Jul-25	%Ch
BHARATFORG	1214.80	1314.50	-7.58
ZEEL	137.36	147.38	-6.80
SONACOMS	447.15	478.40	-6.53
UNIONBANK	143.74	153.09	-6.11
MAXHEALTH	1219.20	1298.20	-6.09

(Source: Capitaline)

## World Markets

KEY INDICES	11-Jul-25	04-Jul-25	%Ch
DJIA	24255.31	CLOSED	-
NASDAQ	20585.53	CLOSED	-
BOVESPA	136187.31	141263.56	-3.59
FTSE 100	8941.12	8822.91	1.34
CAC 40	7829.29	7696.27	1.73
DAX	24255.31	23787.45	1.97
MOEX RUSSIA	2642.00	2801.65	-5.70
NIKKEI 225	39569.68	39810.88	-0.61
HANG SENG	24139.57	23916.06	0.93
STRAITS TIMES	4087.81	4013.62	1.85
SHANGHAI COMPOSITE	3510.18	3472.32	1.09
JAKARTA	7047.44	6865.19	2.65

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

### Global Markets:

U.K. gross domestic product (GDP) fell by 0.1% in May on a monthly basis, following a 0.3% contraction in April, the largest decline since October 2023.

The Bank of Korea held interest rates steady at 2.5%, signaling a readiness to ease policy further amid ongoing economic challenges.

Australia's central bank held its policy rate at 3.85%.

The Federal Reserve's June meeting minutes, released Wednesday, showed most policymakers still expect rate cuts this year, though divisions are emerging. While some members are eyeing a possible cut as early as July, others see no need for any easing in 2025.

(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 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 25078, 25007, 24885, 23792 while levels of 25272, 25394, 25465, 25552 may act as resistance with pivot point at 25200.

(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	25414.00	25552.00	-0.54%	58.75	538638	538584	0.01%
BANKNIFTY	31-Jul-25	56890.00	57305.20	-0.72%	135.30	135009	133735	0.95%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
APOLLOHOSP	7189.50	7221.50	31-Jul-25	8.12%
TECHM	1602.50	1609.20	31-Jul-25	7.63%
M&M	3073.20	3086.00	31-Jul-25	7.60%
TORNTPHARM	3314.20	3327.90	31-Jul-25	7.54%
GRASIM	2762.00	2773.40	31-Jul-25	7.53%
BEL	409.30	410.95	31-Jul-25	7.36%
ADANIENT	2558.70	2569.00	31-Jul-25	7.35%
HDFCBANK	1983.70	1991.60	31-Jul-25	7.27%
BHARATFORG	1214.80	1219.60	31-Jul-25	7.21%
ICICIBANK	1421.90	1427.50	31-Jul-25	7.19%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HEROMOTOCO	4218.70	4145.30	31-Jul-25	-31.75%
WIPRO	258.30	254.95	31-Jul-25	-23.67%
PAGEIND	47930.00	47400.00	31-Jul-25	-20.18%
BOSCHLTD	36525.00	36125.00	31-Jul-25	-19.99%
CUMMINSIND	3546.40	3517.80	31-Jul-25	-14.72%
HCLTECH	1638.30	1625.30	31-Jul-25	-14.48%
PIDILITIND	3000.80	2986.20	31-Jul-25	-8.88%
EXIDEIND	380.65	378.85	31-Jul-25	-8.63%
BHARTIARTL	1921.90	1913.90	31-Jul-25	-7.60%
DABUR	530.85	528.70	31-Jul-25	-7.39%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	45869700	41864625	<b>1.10</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. GODREJCP</b>	<b>2. HINDUNILVR</b>	<b>3. DABUR</b>	<b>4. EMAMILTD</b>	<b>5. RADICO</b>
<b>6. PERSISTENT</b>	<b>7. OFSS</b>	<b>8. HCLTECH</b>	<b>9. TCS</b>	<b>10. WIPRO</b>
<b>11. COFORGE</b>	<b>12. TECHM</b>	<b>13. MPHASIS</b>	<b>14. INFY</b>	

(Source: [Moneycontrol](#))

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