

Market Snapshot

KEY INDICES	12-Sep-25	05-Sep-25	05-Sep-25
S&P CNX NIFTY	25114.00	24741.00	1.51
SENSEX	81904.70	80710.76	1.48
NIFTY MIDCAP 100	58227.20	57075.20	2.02
NIFTY SMLCAP 100	17989.90	17655.25	1.90

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

Sectoral Snapshot

KEY INDICES	12-Sep-25	05-Sep-25	%Ch
NIFTY BANK	54809.30	54114.55	1.28
NIFTY AUTO	26866.65	26320.60	2.07
NIFTY FMCG	56557.15	56292.10	0.47
NIFTY IT	36110.75	34635.85	4.26
NIFTY METAL	9883.60	9681.65	2.09
NIFTY PHARMA	22341.20	21924.80	1.90
NIFTY REALTY	884.35	872.50	1.36
BSE CG	69691.79	66852.58	4.25
BSE CD	61654.80	62399.45	-1.19
BSE Oil & GAS	26234.39	25842.48	1.52
BSE POWER	6690.29	6541.74	2.27

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

FII & DII Activities (Rs Crore)

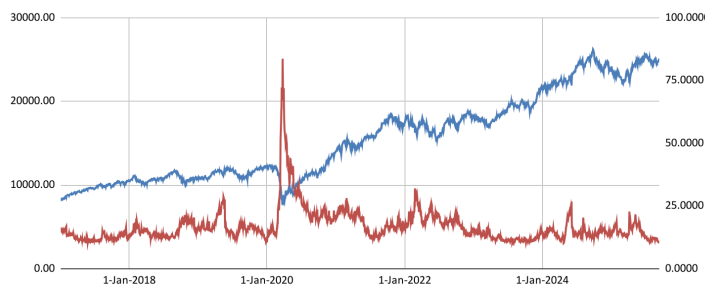
05/09/2025 to 12/09/2025

Activities	FIIs	DIIIs
Buy	85991.84	74920.24
Sell	85201.41	59395.78
Net	790.43	15524.46

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Barometers end with significant gains; Nifty ends above 24,100 level

The Indian equity market ended the week on a strong note, primarily driven by improved investor sentiment following recent GST reforms, hopes of easing India-U.S. relations and a potential U.S. Fed rate cut next week. Further, investors sentiment remained buoyant due to positive revision in India's growth outlook. This upward revision reinforced confidence in the country's economic resilience.

In the week ended on Friday, 12 September 2025, the S&P BSE Sensex rallied 1,117.4 points or 1.38% to settle at 81,904.70. The Nifty 50 index jumped 314.15 points or 1.37% to settle at 24,114. The BSE Mid-Cap index rose 0.09% to close at 46,184.30. The BSE Small-Cap added 0.27% to end at 53,548.49.

Global ratings agency Fitch Ratings has revised its growth forecast for India, raising its projection for the fiscal year ending March 2026 (FY26) to 6.9%, up from the previous 6.5%.

Prime Minister Narendra Modi on Wednesday reaffirmed India's deep ties with the United States, describing the two

Sensex Gainers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
BAJFINANCE	1003.20	937.65	6.99
INFY	1525.55	1444.35	5.62
AXISBANK	1105.30	1056.20	4.65
BAJAJFINSV	2082.55	2014.10	3.40
TATAMOTORS	715.00	691.85	3.35

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
TITAN	3571.00	3665.25	-2.57
INDUSINDBK	740.70	757.20	-2.18
HINDUNILVR	2580.30	2633.20	-2.01
ULTRACEMCO	12371.85	12596.90	-1.79
ASIANPAINT	2544.25	2578.90	-1.34

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
BAJFINANCE	1003.25	937.60	7.00
INFY	1525.60	1444.60	5.61
ADANIPORTS	1393.10	1321.80	5.39
AXISBANK	1105.30	1055.90	4.68
EICHERMOT	6875.00	6580.50	4.48

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
TITAN	3571.90	3665.30	-2.55
INDUSINDBK	740.50	757.05	-2.19
HINDUNILVR	2580.50	2633.40	-2.01
ULTRACEMCO	12370.00	12601.00	-1.83
SHREECEM	29580.00	30040.00	-1.53

(Source: Capitaline)

countries as "close friends and natural partners." Modi also expressed optimism about collaborating with Trump to secure a "brighter, more prosperous future" for the people of both nations.

His comments followed remarks by President Trump, who said that Washington and New Delhi would continue negotiations to address existing trade barriers. The statements from both leaders have lifted hopes of progress toward resolving tariff frictions and strengthening bilateral economic ties.

Global Market

Euro Zone Inflation in the euro zone edged up to 2.1% in August, slightly above the European Central Bank's 2% target, according to flash estimates from Eurostat. Core inflation—which excludes volatile food, energy, alcohol, and tobacco prices—remained steady at 2.3%, unchanged from July. Meanwhile, services inflation, a key metric for the ECB, eased slightly to 3.1% from 3.2% in the previous month.

German inflation rose to 2.1% in August, in line with preliminary estimates, as confirmed by the Federal Statistics Office. Harmonized consumer prices, used for EU-wide comparisons, had increased 1.8% year-over-year in July.

The UK economy showed signs of a summer slowdown, with GDP growth flat in July, following a 0.4% expansion in June, according to the Office for National Statistics. This pause comes after a relatively strong first half of 2025, during which GDP grew by 0.7% in Q1 and 0.3% in Q2.

Japan's economy expanded at a stronger-than-expected pace in Q2 2025. Revised data from the Cabinet Office showed annualized GDP growth of 2.2% for the April–June period, up from the initially reported 1.0%. Quarterly growth was also revised to 0.5% from 0.3%, boosted by upward revisions in private consumption and inventories.

U.S. job growth slowed significantly in August, with the unemployment rate rising to 4.3%, the highest level in

Nifty Midcap 100 Gainers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
MSUMI	50.09	45.17	10.89
FLUOROCHEM	3715.70	3353.70	10.79
OFSS	8979.00	8280.00	8.44
TUBEINVEST	3231.20	2990.60	8.05
BHEL	228.72	212.36	7.70

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	12-Sep-25	05-Sep-25	%Ch
TRENT	5130.00	5528.50	-7.21
CROMPTON	314.45	327.60	-4.01
RAMCOCEM	1030.90	1069.80	-3.64
JUBLFOOD	635.15	656.00	-3.18
SONACOMS	428.30	441.10	-2.90

(Source: Capitaline)

World Markets

KEY INDICES	12-Sep-25	05-Sep-25	%Ch
DJIA	45834.22	45400.86	0.95
NASDAQ	22141.10	21700.39	2.03
BOVESPA	142271.58	142640.00	-0.26
FTSE 100	9283.29	9208.21	0.82
CAC 40	7825.24	7674.78	1.96
DAX	23698.15	23596.98	0.43
MOEX RUSSIA	2839.73	2901.45	-2.13
NIKKEI 225	44768.12	43018.75	4.07
HANG SENG	26388.16	25417.98	3.82
STRAITS TIMES	4344.24	4307.08	0.86
SHANGHAI COMPOSITE	3870.60	3812.51	1.52
JAKARTA	7854.06	CLOSED	-

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

nearly four years. The data pointed to a softening labor market and fueled expectations of a Federal Reserve rate cut later this month.

The Consumer Price Index (CPI) rose 0.4% in August, the largest monthly increase since January, following a 0.2% rise in July, according to the Bureau of Labor Statistics. The increase was driven largely by a 0.4% rise in shelter costs, while food prices jumped 0.5%, with supermarket prices up 0.6%.

The larger-than-expected rise in CPI marked the biggest annual increase in inflation since January. The combination of rising inflation and a weakening labor market has raised concerns over potential stagflation, creating a policy dilemma for the Federal Reserve ahead of its upcoming rate decision.

(Source: Capitaline)

Outlook and Technical View

U.S Federal Reserve meet to remain in focus with expectation of rate cut. 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 25055, 24996, 24898, 24755 while levels of 25156, 25257, 25353, 25502 may act as resistance with pivot point at 25097.

(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	25210.10	24849.60	1.45%	96.10	665511	683910	-2.69%
BANKNIFTY	30-Sep-25	55008.00	54347.60	1.22%	198.70	164269	187656	-12.46%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	7.66	7.71	30-Sep-25	13.24%
MARICO	734.55	738.25	30-Sep-25	10.21%
BAJAJFINSV	2081.50	2091.70	30-Sep-25	9.94%
AMBUJACEM	560.55	563.25	30-Sep-25	9.77%
IOC	142.61	143.29	30-Sep-25	9.67%
ICICIPRULI	600.80	603.65	30-Sep-25	9.62%
ADANI PORTS	1393.10	1399.70	30-Sep-25	9.61%
SAIL	132.26	132.88	30-Sep-25	9.51%
M&M	3589.90	3606.70	30-Sep-25	9.49%
PFC	395.70	397.55	30-Sep-25	9.48%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
UPL	693.10	686.15	30-Sep-25	-20.33%
NATIONALUM	218.30	216.82	30-Sep-25	-13.75%
GODREJCP	1249.70	1241.30	30-Sep-25	-13.63%
DRREDDY	1316.70	1308.60	30-Sep-25	-12.47%
VOLTAS	1403.60	1395.30	30-Sep-25	-11.99%
ASHOKLEY	134.09	133.45	30-Sep-25	-9.68%
IGL	214.79	213.94	30-Sep-25	-8.02%
INDIGO	5727.50	5720.50	30-Sep-25	-2.48%
INFY	1525.60	1524.60	30-Sep-25	-1.33%
MARUTI	15325.00	15315.00	30-Sep-25	-1.32%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	52789575	47196975	1.12

(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. OFSS	2. COFORGE	3. INFY	4. PERSISTENT	5. MPHAISIS
6. HCLTECH	7. WIPRO	8. TECHM	9. TCS	10. LTIM
11. CROMPTON	12. BLUESTARCO	13. TITAN	14. VOLTAS	

(Source: [Moneycontrol](#))

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