

Market Snapshot

KEY INDICES	12-Dec-25	05-Dec-25	05-Sep-25
S&P CNX NIFTY	26046.95	26186.45	-0.53
SENSEX	85267.66	85712.37	-0.52
NIFTY MIDCAP 100	60283.30	60594.60	-0.51
NIFTY SMLCAP 100	17389.95	17507.75	-0.67

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

Sectoral Snapshot

KEY INDICES	12-Dec-25	05-Dec-25	%Ch
NIFTY BANK	59389.95	59777.20	-0.65
NIFTY AUTO	27820.85	27939.10	-0.42
NIFTY FMCG	54490.80	55202.85	-1.29
NIFTY IT	38274.75	38703.65	-1.11
NIFTY METAL	10536.45	10340.35	1.90
NIFTY PHARMA	22808.70	22947.15	-0.60
NIFTY REALTY	886.55	893.15	-0.74
BSE CG	66781.85	67647.37	-1.28
BSE CD	59934.00	60828.52	-1.47
BSE Oil & GAS	27976.91	27947.46	0.11
BSE POWER	6516.65	6501.06	0.24

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

FII & DII Activities (Rs Crore)

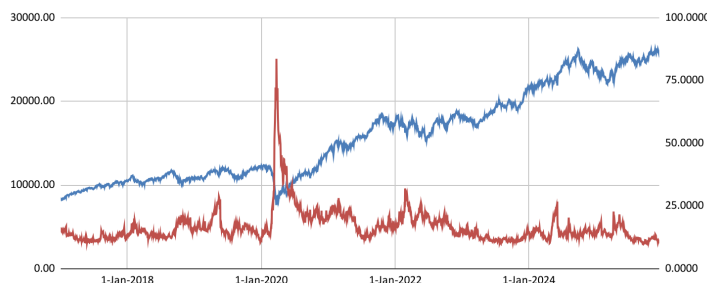
05/12/2025 to 12/12/2025

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))

Sensex, Nifty end with moderate losses; Nifty closes below 26,050 mark

The Indian equity market ended the week with modest losses, as investors booked profits ahead of the U.S. Federal Reserve's policy decision, triggering pressure on midcaps and blue chips. Foreign outflows and a weakening rupee further dampened sentiment, keeping trade volatile through most of the week. However, benchmarks staged a late rebound after the Fed delivered a 25-basis-point rate cut, improving global risk appetite and lifting markets toward the week's close.

In the week ended on Friday, 12 December 2025, the S&P BSE Sensex declined 444.71 points or 0.51% to settle at 85,267.66. The Nifty 50 index slipped 139.5 points or 0.53% to settle at 26,046.95. The BSE Mid-Cap index rose 1.14% to close at 46,477.51. The BSE Small-Cap added 0.65% to end at 50,890.67.

Kaynes Technology India witnessed sharp selling. The company dismissed a media report claiming it was planning to replace its statutory auditor over alleged reporting issues. In a clarification to the stock exchanges, the company said

Sensex Gainers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
TATASTEEL	171.90	167.10	2.87
TITAN	3880.40	3814.30	1.73
MARUTI	16520.90	16277.30	1.50
ULTRACEMCO	11725.05	11599.75	1.08
KOTAKBANK	2176.45	2154.55	1.02

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
ASIANPAINT	2765.45	2967.15	-6.80
HINDUNILVR	2261.05	2339.00	-3.33
BAJFINANCE	1017.45	1048.45	-2.96
INDUSINDBK	845.70	869.95	-2.79
POWERGRID	263.60	269.75	-2.28

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
HINDALCO	852.10	823.25	3.50
GRASIM	2836.70	2747.00	3.27
TATASTEEL	171.89	167.11	2.86
TITAN	3880.20	3813.30	1.75
MARUTI	16522.00	16282.00	1.47

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
ASIANPAINT	2764.80	2968.50	-6.86
HEROMOTOCO	5960.00	6350.50	-6.15
HINDUNILVR	2260.60	2338.60	-3.34
JSWSTEEL	1125.50	1162.20	-3.16
BAJFINANCE	1017.30	1048.00	-2.93

(Source: Capitaline)

no discussions or proposals regarding an auditor change have taken place and that the report stemmed from a misinterpretation of management's general remarks in an interview. It added that the current auditors continue in office as per their approved tenure, and there are no regulatory or legal proceedings related to the matter.

Europe:

The U.K. economy unexpectedly contracted 0.1% in the three months to October, according to official figures released on Friday. The decline was driven by flat services output, a 0.3% drop in construction activity, and a 0.5% fall in production output.

Separately, Switzerland's central bank kept interest rates unchanged at 0%, citing inflation that came in slightly below expectations.

China:

China's outbound shipments rose 5.9% year-on-year in U.S. dollar terms, while imports increased 1.9%, improving from October's 1% rise. Rare earth exports accelerated sharply, with shipments reaching 5,494 tonnes, up 24% from a year earlier.

China's consumer price index climbed 0.7% year-on-year, the highest reading since February last year, after a 0.2% rise in October. Meanwhile, factory-gate inflation (PPI) fell 2.2% in November, slightly deeper than October's 2.1% decline.

Japan:

Japan's economy shrank more than initially estimated in the July-September quarter, with GDP contracting at an annualized 2.3%, worse than the preliminary 1.8% figure and economists' expectations. The weaker revision underscores persistent headwinds for the world's third-largest economy.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
HINDZINC	561.65	498.10	12.76
IDEA	11.64	10.80	7.78
BANDHANBNK	149.57	140.08	6.77
NAVINFUOR	6122.50	5772.00	6.07
JSWENERGY	482.20	461.95	4.38

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	12-Dec-25	05-Dec-25	%Ch
COFORGE	1851.00	1977.90	-6.42
M&MFIN	346.10	367.55	-5.84
LALPATHLAB	2874.50	3029.60	-5.12
GLAND	1678.60	1751.60	-4.17
POONAWALLA	451.45	470.65	-4.08

(Source: Capitaline)

World Markets

KEY INDICES	12-Dec-25	05-Dec-25	%Ch
DJIA	48458.05	47954.99	1.05
NASDAQ	23195.17	23578.13	-1.62
BOVESPA	160766.38	157369.36	2.16
FTSE 100	9649.03	9667.01	-0.19
CAC 40	8068.62	8114.74	-0.57
DAX	24186.49	24028.14	0.66
MOEX RUSSIA	2739.49	2711.30	1.04
NIKKEI 225	50836.55	50491.87	0.68
HANG SENG	25976.79	26085.08	-0.42
STRAITS TIMES	4586.45	4531.36	1.22
SHANGHAI COMPOSITE	3889.35	3902.81	-0.34
JAKARTA	8660.50	8632.76	0.32

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

United States:

The U.S. Federal Reserve cut the Federal Funds rate by 25 basis points to 3.50%-3.75%, indicating that this could be the final rate cut in the current cycle. Chair Jerome Powell said the latest move brings policy into a "comfortable zone," balancing growth support with inflation management.

The Fed also announced plans to resume \$40 billion in weekly Treasury bill purchases, pushing short-term yields lower.

Meanwhile, the core PCE Price Index-the Fed's preferred inflation gauge-rose 0.2% month-on-month and 2.8% year-on-year, cooler than expected and strengthening hopes of further policy accommodation.

(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 25970, 25895, 25851, 25782 while levels of 26090, 26133, 26209, 26302 may act as resistance with pivot point at 26014.

(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	26148.00	26335.00	-0.71%	101.05	652113	589083	10.70%
BANKNIFTY	30-Dec-25	59645.00	60080.00	-0.72%	255.05	114406	98908	15.67%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	11.64	11.71	30-Dec-25	12.19%
BHARATFORG	1426.60	1434.00	30-Dec-25	10.52%
BIOCON	386.35	388.30	30-Dec-25	10.23%
RBLBANK	307.60	309.15	30-Dec-25	10.22%
MFSL	1719.00	1727.60	30-Dec-25	10.14%
TORNTPOWER	1290.80	1297.20	30-Dec-25	10.05%
MARICO	727.05	730.65	30-Dec-25	10.04%
PFC	344.20	345.90	30-Dec-25	10.02%
GODREJPROP	2075.10	2085.30	30-Dec-25	9.97%
BHEL	285.15	286.55	30-Dec-25	9.96%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
VOLTAS	1377.20	1355.50	30-Dec-25	-31.95%
ASHOKLEY	163.86	163.58	30-Dec-25	-3.47%
PAGEIND	36930.00	36920.00	30-Dec-25	-0.55%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	61990125	58727650	1.06

(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. HINDZINC	2. JSL	3. VEDL	4. HINDALCO	5. TATASTEEL
6. HINDCOPPER	7. JINDALSTEL	8. NMDC	9. NATIONALUM	10. ADANIENT
11. ASIANPAINT	12. DIXON	13. KALYANKJIL	14. WHIRLPOOL	15. BERGERPAINT
16. CROMPTON				

(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 | www.shriraminsight.com |