

Market Snapshot

KEY INDICES	14-Aug-25	08-Aug-25	%Ch
S&P CNX NIFTY	24631.30	24363.30	1.10
SENSEX	80597.66	79857.79	0.93
NIFTY MIDCAP 100	56504.25	56002.20	0.90
NIFTY SMLCAP 100	17547.45	17428.20	0.68

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

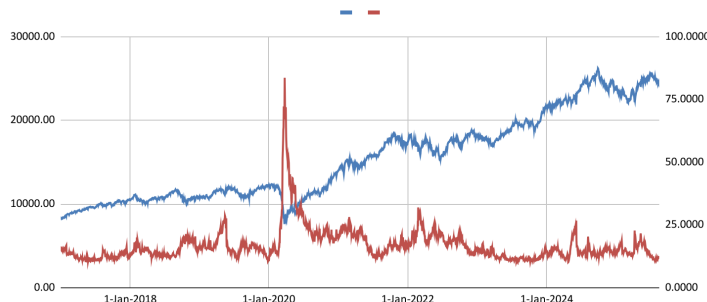
Sectoral Snapshot

KEY INDICES	14-Aug-25	08-Aug-25	%Ch
NIFTY BANK	55341.85	55004.90	0.61
NIFTY AUTO	24118.80	23474.65	2.74
NIFTY FMCG	54656.30	54900.95	-0.45
NIFTY IT	34833.20	34398.50	1.26
NIFTY METAL	9216.25	9147.10	0.76
NIFTY PHARMA	22151.85	21402.15	3.50
NIFTY REALTY	879.35	874.15	0.59
BSE CG	66761.32	66751.26	0.02
BSE CD	59060.51	59029.25	0.05
BSE Oil & GAS	26023.52	26029.19	-0.02
BSE POWER	6608.52	6573.23	0.54

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

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Barometers snap 6-week losing streak; Nifty ends above 24,600 level

The key equity indices ended higher for the week, snapping a six-week losing streak. Markets rebounded, driven by positive global cues and supportive domestic inflation data. Gains were sustained through the week, aided by easing CPI and WPI readings, despite some mid-week volatility due to weakness in financial stocks. However, broader market indices underperformed, with both mid- and small-cap indices ending in the red. The Nifty settled above 24,600 level.

In the week ended on Thursday, 14 August 2025, the S&P BSE Sensex rallied 739.87 points or 0.92% to settle at 80,597.66. The Nifty 50 index jumped 268 points or 1.10% to settle at 24,631.30. The BSE Mid-Cap index shed 0.18% to close at 44,979.24. The BSE Small-Cap declined 0.59% to end at 51,788.88.

India's retail inflation, measured by the Consumer Price Index (CPI), eased to 1.55% in July, down 55 basis points from 2.10% in June, according to data from the Ministry of Statistics & Programme Implementation. This marks the lowest year-on-year inflation rate since June 2017.

FII & DII Activities (Rs Crore)

08/08/2025 to 14/08/2025

Activities	FIIs	DII
Buy	62210.25	70806.55
Sell	70781.42	44083.13
Net	-8571.17	26723.42

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
TATAMOTORS	664.55	633.30	4.93
M&M	3265.50	3146.25	3.79
SUNPHARMA	1642.60	1586.70	3.52
WIPRO	246.75	239.55	3.01
SBIN	826.70	804.55	2.75

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
BAJFINANCE	861.80	877.25	-1.76
TATASTEEL	155.30	158.00	-1.71
INDUSINDBK	769.80	782.75	-1.65
NESTLEIND	1089.35	1097.40	-0.73
ITC	411.40	414.40	-0.72

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
CIPLA	1564.00	1485.80	5.26
TATAMOTORS	664.60	633.70	4.88
DRREDDY	1260.40	1211.40	4.04
M&M	3265.40	3144.20	3.85
DIVISLAB	6132.50	5914.50	3.69

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
ADANI PORTS	1300.30	1325.00	-1.86
BAJFINANCE	861.45	877.15	-1.79
TATASTEEL	155.30	157.95	-1.68
INDUSINDBK	769.75	782.45	-1.62
BRITANNIA	5302.50	5387.00	-1.57

(Source: Capitaline)

The annual rate of inflation based on All India Wholesale Price Index (WPI) number is -0.58% (provisional) for the month of July, 2025 (over July, 2024). Negative rate of inflation in July, 2025 is primarily due to decrease in prices of food articles, mineral oils, crude petroleum & natural gas, manufacture of basic metals etc. WPI has marked its second consecutive month in negative territory and wholesale price inflation is at a two-year low.

India's merchandise trade deficit significantly widened sharply to \$27.35 billion in July, compared with \$18.78 billion in June, as exports declined to \$37.24 billion while imports rose to \$64.59 billion.

Global Markets:

The U.K. labor market showed signs of strength, with employment rising by a better-than-expected 238,000 in the three months to June. However, job vacancies dropped by 44,000 during the May-July period, marking the 37th consecutive quarter of decline.

U.K. economy expanded by 0.3% in the second quarter of 2025, surpassing market expectations.

In Japan, manufacturer sentiment improved following a trade agreement with the United States. A monthly poll tracking the Bank of Japan's quarterly Tankan survey showed the sentiment index rising to +9 in August from +7 in July, marking a second consecutive month of improvement.

Japan's annual wholesale inflation eased for the fourth straight month in July. The Corporate Goods Price Index (CGPI), which tracks the prices companies charge each other for goods and services, rose 2.6% year-on-year-down from June's 2.9% increase and slightly above the median forecast of 2.5%. The data supports the Bank of Japan's view that inflationary pressure from raw material costs is subsiding.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
ALKEM	5347.50	4764.00	12.25
PAYTM	1151.30	1062.40	8.37
TUBEINVEST	3063.60	2885.70	6.16
ASHOKLEY	121.96	115.42	5.67
ZYDUSLIFE	988.80	936.15	5.62

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	14-Aug-25	08-Aug-25	%Ch
BATAINDIA	1049.70	1182.10	-11.20
OIL	400.75	432.40	-7.32
ASTRAL	1279.20	1375.80	-7.02
IDEA	6.15	6.51	-5.53
CONCOR	531.80	556.65	-4.46

(Source: Capitaline)

World Markets

KEY INDICES	15-Aug-25	08-Aug-25	%Ch
DJIA	44946.12	44175.61	1.74
NASDAQ	21622.98	21450.02	0.81
BOVESPA	136340.77	135913.25	0.31
FTSE 100	9138.90	9095.73	0.47
CAC 40	7923.45	7743.00	2.33
DAX	24359.30	24162.86	0.81
MOEX RUSSIA	3012.09	2924.63	2.99
NIKKEI 225	43378.31	41820.48	3.73
HANG SENG	25270.07	24858.82	1.65
STRAITS TIMES	4230.53	4239.83	-0.22
SHANGHAI COMPOSITE	3696.77	3635.13	1.70
JAKARTA	7898.38	7533.38	4.85

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

Australia's unemployment rate declined to 4.2% in July (seasonally adjusted), down from 4.3% in June, according to data released by the Australian Bureau of Statistics.

United States:

The U.S. consumer price index (CPI) rose 0.2% in July on a seasonally adjusted basis and 2.7% year-on-year, according to the Bureau of Labor Statistics.

Excluding food and energy, the core CPI increased by 0.3% for the month and 3.1% annually. This marks the highest monthly core inflation reading since January and the strongest annual rate since February.

(Source: Capitaline)

Outlook and Technical View

Alaska meet between Trump and Putin 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 24594, 24557, 24517, 24352 while levels of 24671, 24711, 24798, 24870 may act as resistance with pivot point at 24634.

(Source: Capitaline)

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	24671.00	24430.00	0.99%	39.70	669351	689787	-2.96%
BANKNIFTY	28-Aug-25	55476.00	55071.00	0.74%	134.15	189945	193333	-1.75%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SHREECEM	30400.00	30540.00	28-Aug-25	12.01%
MARICO	710.55	713.25	28-Aug-25	9.91%
CONCOR	531.80	533.65	28-Aug-25	9.07%
RBLBANK	251.85	252.70	28-Aug-25	8.80%
COLPAL	2154.00	2161.20	28-Aug-25	8.71%
MUTHOOTFIN	2757.40	2766.60	28-Aug-25	8.70%
HINDPETRO	394.35	395.65	28-Aug-25	8.59%
ASHOKLEY	121.96	122.36	28-Aug-25	8.55%
BHEL	221.33	222.05	28-Aug-25	8.48%
M&M	3265.40	3276.00	28-Aug-25	8.46%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
LICHSGFIN	569.25	560.90	28-Aug-25	-38.24%
COALINDIA	384.45	379.70	28-Aug-25	-32.21%
TVSMOTOR	3020.30	2996.80	28-Aug-25	-20.29%
PFC	416.50	413.55	28-Aug-25	-18.47%
VOLTAS	1274.80	1266.20	28-Aug-25	-17.59%
WIPRO	246.81	245.15	28-Aug-25	-17.54%
DRREDDY	1260.40	1253.80	28-Aug-25	-13.65%
POWERGRID	288.70	287.70	28-Aug-25	-9.03%
FEDERALBNK	195.86	195.33	28-Aug-25	-7.05%
INDIGO	6002.50	5987.00	28-Aug-25	-6.73%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	44139675	45645525	0.97

(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. ALKEM	2. ZYDUSLIFE	3. CIPLA	4. BIOCON	5. LAURUSLABS
6. GRANULES	7. DRREDDY	8. AUROPHARMA	9. DIVISLAB	10. SUNPHARMA
11. AJANTPHARM	12. LUPIN	13. GLAND	14. COLPAL	15. PATANJALI
16. BRITANNIA				

(Source: [Moneycontrol](#))

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