

Market Snapshot

KEY INDICES	18-Jul-25	11-Jul-25	%Ch
S&P CNX NIFTY	24968.40	25149.85	-0.72
SENSEX	81757.73	82500.47	-0.90
NIFTY MIDCAP 100	59104.50	58642.20	0.79
NIFTY SMLCAP 100	18959.65	18763.45	1.05

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

Sectoral Snapshot

KEY INDICES	18-Jul-25	11-Jul-25	%Ch
NIFTY BANK	56283.00	56754.70	-0.83
NIFTY AUTO	23894.35	23493.80	1.70
NIFTY FMCG	56506.90	55910.25	1.07
NIFTY IT	37141.85	37693.25	-1.46
NIFTY METAL	9458.20	9382.85	0.80
NIFTY PHARMA	22592.75	22225.90	1.65
NIFTY REALTY	999.90	962.90	3.84
BSE CG	70200.61	70967.04	-1.08
BSE CD	59792.33	59491.08	0.51
BSE Oil & GAS	27895.17	27802.96	0.33
BSE POWER	6874.58	6890.22	-0.23

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

FII & DII Activities (Rs Crore)

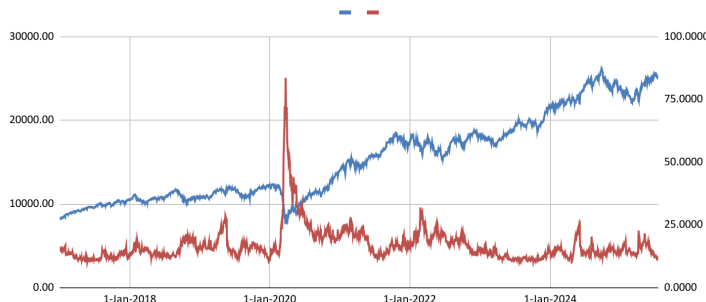
11/07/2025 to 18/07/2025

Activities	FIIs	DIIIs
Buy	80350.35	84761.84
Sell	88873.27	71712.67
Net	-8522.92	13049.17

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Benchmarks slide for third straight week amid global woes

The domestic equity benchmarks ended the week with significant losses, pressured by weak earnings from major IT and banking stocks and cautious global sentiment amid persistent inflation and trade concerns. Although easing domestic inflation briefly lifted investor hopes, overall volatility and uncertainty dominated, leading to declines in the key indices, even as the broader market outperformed during the week.

In the week ended on Friday, 18 July 2025, the S&P BSE Sensex declined 742.74 points or 0.90% to settle at 81,757.73. The Nifty 50 index slipped 181.45 points or 0.72% to settle at 24,968.40. The BSE Mid-Cap index jumped 1.04% to close at 46,775.77. The BSE Small-Cap index gained 1.46% to end at 55,285.44.

India's wholesale price index (WPI) eased to -0.13% in June 2025, according to data released by the Commerce and Industry ministry on Monday. Since March the WPI has been declining steadily, hitting a 14-month low of 0.39% in the previous month. The negative rate of inflation in June 2025

Sensex Gainers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
M&M	3194.10	3074.95	3.87
WIPRO	266.90	258.05	3.43
NESTLEIND	2472.80	2402.40	2.93
SBIN	823.30	808.50	1.83
TATASTEEL	162.50	159.85	1.66

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
AXISBANK	1099.10	1173.75	-6.36
HCLTECH	1549.05	1637.00	-5.37
KOTAKBANK	2140.75	2219.80	-3.56
TECHM	1548.50	1603.00	-3.40
ASIANPAINT	2382.10	2439.60	-2.36

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
UPL	686.85	652.80	5.22
HEROMOTOCO	4396.70	4218.70	4.22
M&M	3192.40	3073.20	3.88
BAJAJ-AUTO	8347.50	8067.00	3.48
WIPRO	266.95	258.30	3.35

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
AXISBANK	1099.30	1173.80	-6.35
HCLTECH	1548.80	1638.30	-5.46
KOTAKBANK	2140.50	2220.60	-3.61
TECHM	1548.90	1602.50	-3.34
HDFCLIFE	739.50	759.00	-2.57

(Source: Capitaline)

is primarily due to decrease in prices of food articles, mineral oils, manufacture of basic metals, crude petroleum & natural gas, etc.

India's forex reserves dropped by \$3.049 billion to \$699.736 billion in the week ended July 4, the RBI said on Friday. For the week ended July 4, foreign currency assets, a major component of the reserves, dropped by \$3.537 billion to \$591.287 billion, the data released on Friday showed. The gold reserves were up by \$342 million to \$84.846 billion during the week, the RBI said. India's reserve position with the IMF jumped by \$107 million to \$4.735 billion in the reporting week, the apex bank data showed.

India's retail inflation, measured by the Consumer Price Index (CPI), cooled to a multi-year low of 2.10% in June 2025, thanks to a sharp dip in food prices. The data, released by the Ministry of Statistics and Programme Implementation (MoSPI) on Monday, 14 July 2025, marks the lowest year-on-year inflation rate since January 2019. For comparison, CPI inflation stood at 2.82% in May 2025 and 5.08% in June 2024.

India's trade deficit for June 2025 narrowed to \$18.78 billion, compared to \$21.88 billion in May, government data showed Tuesday.

Global Markets:

June's economic indicators in China offered a mixed bag. Retail sales growth eased to 4.8% year-on-year, down from 6.4% in May. On the brighter side, industrial output beat forecasts, rising 6.8% year-on-year, while fixed asset investment climbed 2.8% in the first half of 2025. The urban unemployment rate held steady at 5% in June, unchanged from May but lower than the two-year high of 5.4% in February.

Indonesia's central bank cuts the benchmark rate by 25 bps to 5.25%. Governor Perry Warjiyo said the central bank would continue to observe room for more rate cuts, citing

Nifty Midcap 100 Gainers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
PATANJALI	1941.70	1665.20	16.60
PEL	1326.70	1217.50	8.97
IDEA	7.72	7.17	7.67
GLAND	2000.30	1859.00	7.60
SONACOMS	479.75	447.15	7.29

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	18-Jul-25	11-Jul-25	%Ch
NAVINFUOR	4869.30	5073.20	-4.02
SHRIRMFN	645.50	668.25	-3.40
AUBANK	794.90	821.00	-3.18
BHEL	250.50	258.70	-3.17
IDFCFIRSTB	73.09	75.23	-2.84

(Source: Capitaline)

World Markets

KEY INDICES	18-Jul-25	11-Jul-25	%Ch
DJIA	44342.19	44371.51	-0.07
NASDAQ	20895.66	20585.53	1.51
BOVESPA	133381.58	136187.31	-2.06
FTSE 100	8992.12	8941.12	0.57
CAC 40	7822.67	7829.29	-0.08
DAX	24289.51	24255.31	0.14
MOEX RUSSIA	2784.63	2642.00	5.40
NIKKEI 225	39819.11	39569.68	0.63
HANG SENG	24825.66	24139.57	2.84
STRAITS TIMES	4189.50	4087.81	2.49
SHANGHAI COMPOSITE	3534.48	3510.18	0.69
JAKARTA	7311.92	7047.44	3.75

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

an expectation of low inflation through 2026, a stable rupiah and a bleak global economic outlook.

Eurozone's consumer price index (CPI) rose to 2% in June, up from 1.9% in May, signaling a slight uptick in inflation. Meanwhile, the UK unemployment rate climbed to 4.7% in May, compared to 4.6% in the previous month, pointing to some softness in the labor market.

US consumer prices showed signs of heating up, rising 2.7% year-on-year in June compared to 2.4% in May. On a monthly basis, inflation stood at 0.3%, matching expectations.

(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 24877, 24785, 24651, 24552 while levels of 25103, 25237, 25329, 25552 may act as resistance with pivot point at 25011.

(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	25026.80	25208.00	-0.72%	58.40	549552	538056	2.14%
BANKNIFTY	31-Jul-25	56354.20	56890.00	-0.94%	71.20	149536	135009	10.76%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
JSWSTEEL	1034.40	1039.30	31-Jul-25	13.30%
INDUSINDBK	870.05	873.95	31-Jul-25	12.59%
RELIANCE	1476.00	1482.60	31-Jul-25	12.55%
ICICIBANK	1425.80	1432.00	31-Jul-25	12.21%
BEL	394.75	396.40	31-Jul-25	11.74%
PETRONET	303.95	305.20	31-Jul-25	11.55%
BHARATFORG	1216.60	1221.60	31-Jul-25	11.54%
GRASIM	2728.50	2739.60	31-Jul-25	11.42%
GLENMARK	2225.50	2234.50	31-Jul-25	11.35%
MARUTI	12419.00	12469.00	31-Jul-25	11.30%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	266.95	262.40	31-Jul-25	-47.86%
HEROMOTOCO	4396.70	4337.40	31-Jul-25	-37.87%
BPCL	343.50	339.60	31-Jul-25	-31.88%
BOSCHLTD	38250.00	37895.00	31-Jul-25	-26.06%
PIDILITIND	2958.10	2942.50	31-Jul-25	-14.81%
LUPIN	1932.20	1922.70	31-Jul-25	-13.80%
DLF	845.20	841.05	31-Jul-25	-13.79%
HAVELLS	1518.50	1512.20	31-Jul-25	-11.65%
RBLBANK	263.14	262.13	31-Jul-25	-10.78%
VOLTAS	1377.00	1372.80	31-Jul-25	-8.56%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	47923350	52005450	0.92

(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. SOBHA	2. GODREJPROP	3. PRESTIGE	4. ANANTRAJ	5. BRIGADE
6. DLF	7. LODHA	8. RAYMOND	9. HCLTECH	10. TECHM
11. TCS				

(Source: [Moneycontrol](#))

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