

## Market Snapshot

KEY INDICES	19-Sep-25	12-Sep-25	05-Sep-25
<b>S&amp;P CNX NIFTY</b>	25327.05	25114.00	<b>0.85</b>
<b>SENSEX</b>	82626.23	81904.70	<b>0.88</b>
<b>NIFTY MIDCAP 100</b>	59094.35	58227.20	<b>1.49</b>
<b>NIFTY SMLCAP 100</b>	18504.55	17989.90	<b>2.86</b>

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

## Sectoral Snapshot

KEY INDICES	19-Sep-25	12-Sep-25	%Ch
<b>NIFTY BANK</b>	55458.85	54809.30	<b>1.19</b>
<b>NIFTY AUTO</b>	27219.55	26866.65	<b>1.31</b>
<b>NIFTY FMCG</b>	56273.05	56557.15	<b>-0.50</b>
<b>NIFTY IT</b>	36578.25	36110.75	<b>1.29</b>
<b>NIFTY METAL</b>	9989.90	9883.60	<b>1.08</b>
<b>NIFTY PHARMA</b>	22686.60	22341.20	<b>1.55</b>
<b>NIFTY REALTY</b>	923.50	884.35	<b>4.43</b>
<b>BSE CG</b>	71231.16	69691.79	<b>2.21</b>
<b>BSE CD</b>	61150.67	61654.80	<b>-0.82</b>
<b>BSE Oil &amp; GAS</b>	26825.46	26234.39	<b>2.25</b>
<b>BSE POWER</b>	6871.44	6690.29	<b>2.71</b>

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

## FII & DII Activities (Rs Crore)

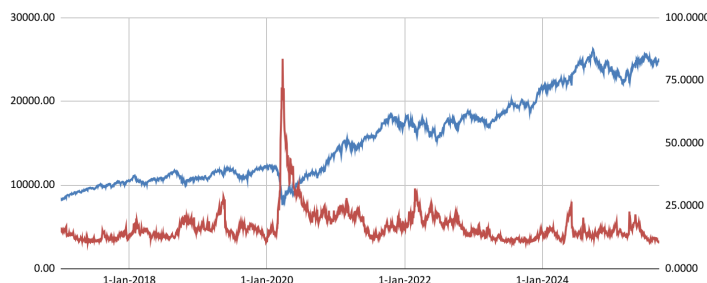
12/09/2025 to 19/09/2025

Activities	FIIs	DIIIs
<b>Buy</b>	73051.94	76502.94
<b>Sell</b>	73628.71	63769.55
<b>Net</b>	<b>-576.77</b>	<b>12733.39</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Market rallies for 3rd week amid trade talks, Fed cut, and easing inflation

The domestic equity benchmarks saw significant gains this week, with declines occurring only on Monday and Friday, while the other three days closed in positive territory. The market was buoyed by optimism around India-U.S. trade talks and the U.S. Federal Reserve's 0.25% interest rate cut. Investor confidence was also supported by recent GST reforms and India's return to positive wholesale inflation, which eased deflation concerns.

In the week ended on Friday, 19 September 2025, the S&P BSE Sensex jumped 721.53 points or 0.88% to settle at 82,626.23. The Nifty 50 index advanced 213.05 points or 0.85% to settle at 25,327.05. The BSE Mid-Cap index added 1.47% to close at 46,867.33. The BSE Small-Cap index gained 2% to end at 54,622.04.

India's inflation based on Wholesale Price Index (WPI) index rose to 0.52% in August 2025, marking a return to positive territory after two consecutive months of deflation.

In July, wholesale inflation had dropped to a two-year low of -0.58%, while in June, it stood at -0.13%, the lowest in 20 months. The government attributed the positive WPI

## Sensex Gainers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
SBIN	862.25	823.30	<b>4.73</b>
MARUTI	15870.90	15324.90	<b>3.56</b>
BHARTIARTL	1962.35	1904.10	<b>3.06</b>
KOTAKBANK	2030.40	1972.15	<b>2.95</b>
AXISBANK	1135.95	1105.30	<b>2.77</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
TITAN	3466.65	3571.00	<b>-2.92</b>
ASIANPAINT	2484.75	2544.25	<b>-2.34</b>
NESTLEIND	1195.15	1217.45	<b>-1.83</b>
ICICIBANK	1402.40	1417.60	<b>-1.07</b>
BAJFINANCE	993.00	1003.20	<b>-1.02</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
SBIN	862.35	823.55	<b>4.71</b>
IOC	148.50	142.61	<b>4.13</b>
BPCL	329.55	318.00	<b>3.63</b>
MARUTI	15864.00	15325.00	<b>3.52</b>
BHARTIARTL	1962.40	1902.60	<b>3.14</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
TITAN	3467.20	3571.90	<b>-2.93</b>
BRITANNIA	6069.50	6247.00	<b>-2.84</b>
ASIANPAINT	2481.70	2546.30	<b>-2.54</b>
HINDALCO	743.30	758.05	<b>-1.95</b>
NESTLEIND	1194.50	1217.60	<b>-1.90</b>

(Source: Capitaline)

inflation in August to rising prices in several categories, including food products, non-food articles, other manufacturing items, non-metallic mineral products, and transport equipment, among others.

Meanwhile, India's merchandise trade deficit narrowed to \$26.49 billion in August from \$27.35 billion in July. Exports in August decreased to \$35.1 billion from \$37.24 billion in July, while imports dipped to \$61.59 billion from \$64.59 billion in the previous month.

### Global Markets:

South Korea's Kospi index rose in early trade to a record high on Monday after Finance Minister Koo Yun-cheol said that the government will scrap its previous plan to raise taxes on stock investments.

In China, retail sales last month rose 3.4% from a year earlier, data from the National Bureau of Statistics showed Monday, slowing from July's 3.7% growth. As per reports, the industrial output growth slowed to 5.2% in August, compared to the 5.7% jump in July, marking its weakest level since August 2024.

China's central bank left a key interest rate unchanged on Thursday, as authorities appear in no rush to ease monetary settings. Resilient exports and a sharp stock market rally have allowed policymakers to withhold fresh stimulus even with a broader economic slowdown, media reports stated.

The Bank of Japan kept its policy rate steady at 0.5%. Japan's core inflation rate fell to its lowest since November 2024, coming in at 2.7% for August and marking a third straight month of decline, according to government data. Headline inflation in the country also dropped to 2.7%, coming down from 3.1% in July and marking a fresh low since November 2024.

The latest U.K. inflation data, which showed annual price growth holding steady at 3.8% in August.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
POONAWALLA	500.25	439.45	<b>13.84</b>
IDEA	8.40	7.66	<b>9.66</b>
IPCALAB	1441.00	1314.80	<b>9.60</b>
ADANIPOWER	709.40	648.55	<b>9.38</b>
GODREJPROP	2145.20	1998.90	<b>7.32</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	19-Sep-25	12-Sep-25	%Ch
DEVYANI	178.64	187.23	<b>-4.59</b>
PAYTM	1177.20	1219.00	<b>-3.43</b>
MSUMI	48.46	50.09	<b>-3.25</b>
HINDZINC	453.05	462.95	<b>-2.14</b>
MAXHEALTH	1159.70	1184.20	<b>-2.07</b>

(Source: Capitaline)

## World Markets

KEY INDICES	19-Sep-25	12-Sep-25	%Ch
DJIA	46315.27	45834.22	<b>1.05</b>
NASDAQ	22631.48	22141.10	<b>2.21</b>
BOVESPA	145865.11	142271.58	<b>2.53</b>
FTSE 100	9216.67	9283.29	<b>-0.72</b>
CAC 40	7853.59	7825.24	<b>0.36</b>
DAX	23639.41	23698.15	<b>-0.25</b>
MOEX RUSSIA	2748.06	2839.73	<b>-3.23</b>
NIKKEI 225	45045.81	44768.12	<b>0.62</b>
HANG SENG	26545.10	26388.16	<b>0.59</b>
STRAITS TIMES	4302.71	4344.24	<b>-0.96</b>
SHANGHAI COMPOSITE	3820.09	3870.60	<b>-1.30</b>
JAKARTA	8051.12	7854.06	<b>2.51</b>

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

The Bank of England kept its key interest rate at 4% Thursday, as elevated UK inflation offsets the country's stagnant economic growth. The decision widely expected by markets followed a regular policy meeting and came one day after the US Federal Reserve cut its benchmark borrowing costs for the first time in 2025.

The U.S. Federal Reserve cut its interest rate by 25 basis points, bringing the target range to 4%-4.25%. Fed Chair Jerome Powell described the decision as a "risk management cut" rather than a response to underlying economic weakness. The central bank also signalled two more rate cuts in 2025, one in 2026, another in 2027, and no cuts in 2028.

(Source: Capitaline)

## Outlook and Technical View

India-US trade negotiations to remain in focus. 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 25265, 25205, 25123, 25012 while levels of 25408, 25489, 25550, 25642 may act as resistance with pivot point at 25347.

(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	25426.70	25210.10	0.86%	99.65	600291	665511	-9.80%
BANKNIFTY	30-Sep-25	55655.00	55008.00	1.18%	-72.45	135340	164269	-17.61%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
RBLBANK	271.00	272.90	30-Sep-25	23.26%
IDEA	8.40	8.45	30-Sep-25	19.75%
UPL	691.10	694.15	30-Sep-25	14.64%
GLENMARK	2085.20	2094.40	30-Sep-25	14.64%
CONCOR	553.75	556.10	30-Sep-25	14.08%
IGL	215.13	216.03	30-Sep-25	13.88%
PETRONET	278.40	279.55	30-Sep-25	13.71%
EXIDEIND	414.50	416.20	30-Sep-25	13.61%
ICICIPRULI	602.55	605.00	30-Sep-25	13.49%
DLF	777.70	780.85	30-Sep-25	13.44%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
VOLTAS	1419.90	1410.80	30-Sep-25	-21.27%
DRREDDY	1321.70	1315.40	30-Sep-25	-15.82%
GODREJCP	1238.90	1233.70	30-Sep-25	-13.93%
ASHOKLEY	140.89	140.30	30-Sep-25	-13.90%
HDFCLIFE	782.20	780.40	30-Sep-25	-7.64%
CHOLAFIN	1590.90	1587.40	30-Sep-25	-7.30%
MARUTI	15864.00	15830.00	30-Sep-25	-7.11%
HEROMOTOCO	5408.00	5400.50	30-Sep-25	-4.60%
INFY	1540.20	1538.20	30-Sep-25	-4.31%
CUMMINSIND	4080.40	4076.10	30-Sep-25	-3.50%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	64332075	61732800	1.04

(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. ANANTRAJ	2. GODREJPROP	3. PHOENIXLTD	4. PRESTIGE	5. OBEROIRLTY
6. LODHA	7. DLF	8. TITAN	9. ASIANPAINT	10. BATAINDIA

(Source: [Moneycontrol](#))

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