

## Market Snapshot

KEY INDICES	19-Dec-25	12-Dec-25	05-Sep-25
S&P CNX NIFTY	25966.40	26046.95	-0.31
SENSEX	84929.36	85267.66	-0.40
NIFTY MIDCAP 100	60310.15	60283.30	0.04
NIFTY SMLCAP 100	17390.35	17389.95	0.00

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

## Sectoral Snapshot

KEY INDICES	19-Dec-25	12-Dec-25	%Ch
NIFTY BANK	59069.20	59389.95	-0.54
NIFTY AUTO	27657.25	27820.85	-0.59
NIFTY FMCG	54781.35	54490.80	0.53
NIFTY IT	38691.60	38274.75	1.09
NIFTY METAL	10521.10	10536.45	-0.15
NIFTY PHARMA	22751.25	22808.70	-0.25
NIFTY REALTY	884.90	886.55	-0.19
BSE CG	66534.02	66781.85	-0.37
BSE CD	60340.31	59934.00	0.68
BSE Oil & GAS	27930.09	27976.91	-0.17
BSE POWER	6452.21	6516.65	-0.99

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

## FII & DII Activities (Rs Crore)

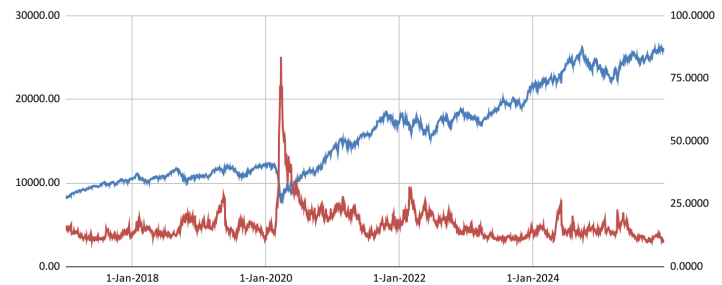
12/12/2025 to 19/12/2025

Activities	FIIs	DIIIs
Buy	70291.14	86081.11
Sell	68371.83	70150.25
Net	1919.31	15930.86

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Indices end marginally lower for the week; global cues, macro data in focus

The Indian equities ended the week marginally lower, with continued selling in heavyweight stocks outweighing steady buying interest in the mid- and small-cap segments. Market sentiment remained cautious through the week amid mixed global cues and uncertainty surrounding the policy outlook of major central banks. On the domestic front, easing wholesale inflation and a sharp narrowing in the trade deficit provided some underlying support to sentiment. A sharp rebound in Friday's session helped cap weekly losses after a volatile and profit-booking-driven trade earlier in the week.

In the week ended on Friday, 19 December 2025, the S&P BSE Sensex dropped 338.3 points or 0.40% to settle at 84,929.36. The Nifty 50 index fell 80.55 points or 0.31% to settle at 26,068.15. The BSE Mid-Cap index advanced 1.26% to close at 46,547.30. The BSE Small-Cap added 1.25% to end at 56,667.26.

## Sensex Gainers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
INFY	1639.60	1598.75	<b>2.56</b>
TECHM	1612.90	1579.05	<b>2.14</b>
TCS	3282.60	3220.15	<b>1.94</b>
SBIN	980.15	962.90	<b>1.79</b>
TMPV	352.75	347.45	<b>1.53</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
AXISBANK	1230.55	1286.30	<b>-4.33</b>
SUNPHARMA	1745.10	1794.30	<b>-2.74</b>
M&M	3602.90	3678.90	<b>-2.07</b>
BAJAJFINSV	2043.90	2086.00	<b>-2.02</b>
ULTRACEMCO	11497.15	11725.05	<b>-1.94</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
BRITANNIA	6103.00	5915.50	<b>3.17</b>
INFY	1638.70	1598.20	<b>2.53</b>
TECHM	1612.50	1578.40	<b>2.16</b>
TCS	3282.00	3220.50	<b>1.91</b>
SBIN	980.30	963.15	<b>1.78</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
AXISBANK	1230.60	1286.10	<b>-4.32</b>
JSWSTEEL	1079.60	1125.50	<b>-4.08</b>
HEROMOTOCO	5781.00	5960.00	<b>-3.00</b>
SUNPHARMA	1744.90	1793.50	<b>-2.71</b>
SHREECEM	25600.00	26285.00	<b>-2.61</b>

(Source: Capitaline)

### India-Oman Trade Deal:

India and Oman signed a Comprehensive Economic Partnership Agreement (CEPA) in Muscat on 18 December 2025, marking a major step toward deepening bilateral economic ties. The agreement will eliminate duties on nearly all goods, covering 98.08% of Indian export lines and 77.79% of Omani imports, and is scheduled to come into effect in the first quarter of 2026.

The pact is expected to significantly boost bilateral trade, which stood at \$10.61 billion in FY 2024-25, by allowing 100% Indian foreign direct investment (FDI) in key Omani service sectors and substantially easing visa norms for skilled professionals. India has kept sensitive products such as agricultural products, including dairy, tea, coffee, rubber, and tobacco products; gold and silver bullion; jewelry; and other labor-intensive products such as footwear, sports goods, and the scrap of many base metals out of the deal.

India's trade deficit narrowed to a five-month low of \$24.53 billion in November. Merchandise exports rose to \$38.13 billion from \$34.48 billion in October, while imports declined to \$62.66 billion from \$76.06 billion.

Meanwhile, India's wholesale inflation remained in deflationary territory in November, with WPI falling 0.32% year-on-year, easing from a 1.21% drop in October. Food prices continued to weigh on the index, though the pace of decline moderated, with wholesale food inflation at -2.6% compared with -5.04% previously. Vegetable prices fell 20.23% after a much steeper 34.97% drop in October, signaling some stabilization. Manufactured product prices rose 1.33% year-on-year, while fuel and power prices declined 2.27%, keeping overall inflation pressures subdued.

The HSBC Flash India Composite Output Index eased to 58.9 in December from 59.7 in November, indicating the slowest pace of output growth since February. The HSBC Flash India Manufacturing PMI posted 55.7 in December, down from

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
DEEPAKNTNTR	1667.00	1528.60	9.05
M&MFIN	376.60	346.10	8.81
TATAELXI	5413.50	5030.50	7.61
SHRIRAMFIN	901.70	848.00	6.33
ASHOKLEY	173.56	163.86	5.92

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	19-Dec-25	12-Dec-25	%Ch
SAIL	125.91	131.90	-4.54
NAVINFUOR	5845.00	6122.50	-4.53
CUMMINSIND	4410.40	4600.20	-4.13
ABCAPITAL	348.70	362.95	-3.93
ZEEL	90.53	94.17	-3.87

(Source: Capitaline)

## World Markets

KEY INDICES	19-Dec-25	12-Dec-25	%Ch
DJIA	48134.89	48458.05	-0.67
NASDAQ	23307.62	23195.17	0.48
BOVESPA	158473.02	160766.38	-1.43
FTSE 100	9897.42	9649.03	2.57
CAC 40	8151.38	8068.62	1.03
DAX	24288.40	24186.49	0.42
MOEX RUSSIA	2743.09	2739.49	0.13
NIKKEI 225	49507.21	50836.55	-2.61
HANG SENG	25690.53	25976.79	-1.10
STRAITS TIMES	4569.78	4586.45	-0.36
SHANGHAI COMPOSITE	3890.45	3889.35	0.03
JAKARTA	8609.55	8660.50	-0.59

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

56.6 in November while the Services PMI Business Activity Index moderated to 59.1 in December from 59.8 in November.

### Global Markets:

The European Central Bank (ECB) kept interest rates unchanged at 3.75%, while Norway's central bank held rates steady at 4%, and Sweden's central bank left its key policy rate unchanged at 1.75%. In contrast, the Bank of England (BoE) trimmed interest rates 25 basis point cut, bringing the base rate down to 3.75%. U.K.'s inflation rate cooled sharply to 3.2% in November.

China's retail sales grew 1.3% year-on-year in November, slowing from a 2.9% rise in the previous month. Industrial production increased 4.8% year-on-year, marginally lower than the 4.9% growth recorded in October.

United States Job growth totaled a seasonally adjusted 64,000 in the latest month, rebounding from a sharp decline in October. The unemployment rate climbed to 4.6%, the highest level since September 2021.

(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 25901, 25834, 25788, 25702 while levels of 26014, 26060, 26127, 26252 may act as resistance with pivot point at 25947.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	30-Dec-25	26036.90	26148.00	<b>-0.42%</b>	<b>70.50</b>	606414	652113	<b>-7.01%</b>
<b>BANKNIFTY</b>	30-Dec-25	59225.00	59645.00	<b>-0.70%</b>	<b>155.80</b>	111788	114406	<b>-2.29%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>PAGEIND</b>	35745.00	35910.00	30-Dec-25	<b>15.32%</b>
<b>ADANIENT</b>	2239.00	2248.30	30-Dec-25	<b>13.78%</b>
<b>SIEMENS</b>	3111.60	3123.40	30-Dec-25	<b>12.58%</b>
<b>SHREECEM</b>	25600.00	25695.00	30-Dec-25	<b>12.31%</b>
<b>NATIONALUM</b>	278.50	279.45	30-Dec-25	<b>11.32%</b>
<b>PFC</b>	338.70	339.85	30-Dec-25	<b>11.27%</b>
<b>RBLBANK</b>	300.25	301.25	30-Dec-25	<b>11.05%</b>
<b>HAVELLS</b>	1416.90	1421.60	30-Dec-25	<b>11.01%</b>
<b>COLPAL</b>	2111.10	2118.00	30-Dec-25	<b>10.85%</b>
<b>TVSMOTOR</b>	3666.00	3677.70	30-Dec-25	<b>10.59%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>ASIANPAINT</b>	2799.90	2792.40	30-Dec-25	<b>-8.89%</b>
<b>ASHOKLEY</b>	173.56	173.14	30-Dec-25	<b>-8.03%</b>
<b>INFY</b>	1638.70	1635.40	30-Dec-25	<b>-6.68%</b>
<b>HDFCLIFE</b>	766.45	765.00	30-Dec-25	<b>-6.28%</b>
<b>MUTHOOTFIN</b>	3781.20	3776.30	30-Dec-25	<b>-4.30%</b>
<b>BOSCHLTD</b>	35940.00	35905.00	30-Dec-25	<b>-3.23%</b>
<b>DRREDDY</b>	1278.20	1277.00	30-Dec-25	<b>-3.12%</b>
<b>IDFCFIRSTB</b>	84.68	84.67	30-Dec-25	<b>-0.39%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	71754975	66973200	<b>1.07</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. INFY</b>	<b>2. TECHM</b>	<b>3. TCS</b>	<b>4. WIPRO</b>	<b>5. BHEL</b>
<b>6. ADANIPOWER</b>	<b>7. ABB</b>	<b>8. ADANIGREEN</b>	<b>9. NTPC</b>	<b>10. SIEMENS</b>

(Source: [Moneycontrol](#))

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