

## Market Snapshot

KEY INDICES	22-Aug-25	14-Aug-25	%Ch
S&P CNX NIFTY	24870.10	24631.30	<b>0.97</b>
SENSEX	81306.85	80597.66	<b>0.88</b>
NIFTY MIDCAP 100	57629.75	56504.25	<b>1.99</b>
NIFTY SMLCAP 100	17919.50	17547.45	<b>2.12</b>

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

## Sectoral Snapshot

KEY INDICES	22-Aug-25	14-Aug-25	%Ch
NIFTY BANK	55149.40	55341.85	<b>-0.35</b>
NIFTY AUTO	25329.45	24118.80	<b>5.02</b>
NIFTY FMCG	55737.45	54656.30	<b>1.98</b>
NIFTY IT	35440.85	34833.20	<b>1.74</b>
NIFTY METAL	9375.45	9216.25	<b>1.73</b>
NIFTY PHARMA	22265.00	22151.85	<b>0.51</b>
NIFTY REALTY	909.65	879.35	<b>3.45</b>
BSE CG	67151.02	66761.32	<b>0.58</b>
BSE CD	60673.30	59060.51	<b>2.73</b>
BSE Oil & GAS	26226.03	26023.52	<b>0.78</b>
BSE POWER	6567.15	6608.52	<b>-0.63</b>

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

## FII & DII Activities (Rs Crore)

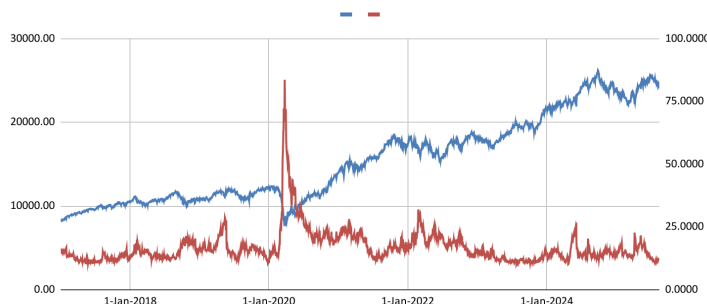
14/08/2025 to 22/08/2025

Activities	FIIs	DIIIs
Buy	87876.18	82761.10
Sell	91205.65	68477.19
Net	<b>-3329.47</b>	<b>14283.91</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Market snaps six-day rally amid profit booking and global uncertainty

The domestic equity benchmarks ended their six-day winning streak today due to profit booking and lingering global uncertainties. Despite strong gains earlier in the week, supported by optimism over upcoming GST reforms, robust domestic data including a sharp rise in India's PMI and steady core sector growth had boosted sentiment. However, mixed global cues from major economies and central banks created some hesitation. This combination led to the market pullback at the week's end.

In the week ended on Friday, 22 August 2025, the S&P BSE Sensex jumped 709.19 points or 0.88% to settle at 81,306.85. The Nifty 50 index advanced 238.8 points or 0.97% to settle at 24,870.10. The BSE Mid-Cap index surged 2.02% to close at 45,890.28. The BSE Small-Cap index jumped 2.34% to end at 53,002.32.

The HSBC Flash India Composite PMI Output Index surged to 65.2 in August, up from 61.1 in July, signaling one of the fastest rates of expansion in over a year.

## Sensex Gainers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
MARUTI	14351.05	12920.45	<b>11.07</b>
NESTLEIND	1161.85	1089.35	<b>6.66</b>
HINDUNILVR	2628.85	2482.95	<b>5.88</b>
M&M	3402.55	3265.50	<b>4.20</b>
BAJFINANCE	894.65	861.80	<b>3.81</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
ITC	398.30	411.40	<b>-3.18</b>
LT	3595.45	3677.25	<b>-2.22</b>
POWERGRID	283.35	288.65	<b>-1.84</b>
HCLTECH	1466.45	1488.90	<b>-1.51</b>
HDFCBANK	1964.75	1991.40	<b>-1.34</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
MARUTI	14349.00	12936.00	<b>10.92</b>
NESTLEIND	1162.90	1089.40	<b>6.75</b>
HEROMOTOCO	4997.90	4708.10	<b>6.16</b>
HINDUNILVR	2629.90	2480.60	<b>6.02</b>
BAJAJ-AUTO	8679.50	8213.50	<b>5.67</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
ITC	398.30	411.45	<b>-3.20</b>
COALINDIA	374.45	384.45	<b>-2.60</b>
LT	3595.80	3677.00	<b>-2.21</b>
POWERGRID	283.35	288.70	<b>-1.85</b>
HCLTECH	1466.30	1489.80	<b>-1.58</b>

(Source: Capitaline)

The services sector led the upturn, with the HSBC Flash India Services PMI Business Activity Index climbing to 65.6, compared to 60.5 in July. Meanwhile, the HSBC Flash India Manufacturing PMI Output Index rose to 64.2, up from 62.5 in July. The broader Manufacturing PMI, which includes new orders, employment, and inventories, edged up to 59.8, compared to 59.1 in the previous month.

Separately, India's eight core industries grew by 2% in July 2025 compared to the same month last year, according to data released by the Commerce and Industry Ministry on Wednesday. The growth was driven by higher production in steel, cement, fertilisers, and electricity.

The revised core sector growth for June 2025 stood at 2.2%, pointing to a steady industrial trend in the early months of the fiscal year.

### Global Markets:

China kept benchmark lending rates unchanged for the third consecutive month on Wednesday, as authorities signaled they are in no rush to deliver monetary stimulus despite a string of recent disappointing economic data. The one-year loan prime rate (LPR) was kept at 3.0%, while the five-year LPR was unchanged at 3.5%.

The US Census Bureau data released Friday morning showed retail sales rose 0.5% in July from the prior month.

Meanwhile, US consumer sentiment deteriorated in August, falling for the first time in four months as inflation expectations jumped in the longer term.

U.S. business activity picked up pace in August, led by a resurgent manufacturing sector that saw the strongest growth in orders in 18 months, a purchasing managers survey showed on Thursday. S&P Global's flash U.S. Composite PMI Output Index, which tracks the manufacturing and services sectors, increased to 55.4 this month, the highest level since December, from 55.1 in July. A reading above 50 indicates expansion in the private sector.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
IDEA	7.07	6.15	<b>14.96</b>
ASTRAL	1425.10	1279.20	<b>11.41</b>
MSUMI	41.76	37.79	<b>10.51</b>
DEVYANI	171.27	155.19	<b>10.36</b>
LTF	222.70	202.08	<b>10.20</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	22-Aug-25	14-Aug-25	%Ch
TATACOMM	1604.50	1694.90	<b>-5.33</b>
BHARATFORG	1123.00	1180.50	<b>-4.87</b>
ABBOTINDIA	31875.00	33265.00	<b>-4.18</b>
PFC	399.85	416.50	<b>-4.00</b>
TORNTPOWER	1282.00	1329.60	<b>-3.58</b>

(Source: Capitaline)

## World Markets

KEY INDICES	22-Aug-25	15-Aug-25	%Ch
DJIA	45631.74	44946.12	<b>1.53</b>
NASDAQ	21496.54	21622.98	<b>-0.58</b>
BOVESPA	137968.16	136340.77	<b>1.19</b>
FTSE 100	9321.40	9138.90	<b>2.00</b>
CAC 40	7969.69	7923.45	<b>0.58</b>
DAX	24363.09	24359.30	<b>0.02</b>
MOEX RUSSIA	2896.76	3012.09	<b>-3.83</b>
NIKKEI 225	42633.29	43378.31	<b>-1.72</b>
HANG SENG	25339.14	25270.07	<b>0.27</b>
STRAITS TIMES	4253.02	4230.53	<b>0.53</b>
SHANGHAI COMPOSITE	3825.76	3696.77	<b>3.49</b>
JAKARTA	7858.85	7898.38	<b>-0.50</b>

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

Further, the number of Americans filing new applications for jobless benefits rose by the most in about three months last week and the number of people collecting unemployment relief in the prior week climbed to the highest level in nearly four years, signaling recent labor market softness continued into August.

(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 24791, 24712, 24565, 24482 while levels of 25017, 25164, 25243, 25302 may act as resistance with pivot point at 24938.

(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	24890.00	24671.00	0.89%	19.90	565899	669351	-15.46%
BANKNIFTY	28-Aug-25	55260.00	55476.00	-0.39%	110.60	178806	189945	-5.86%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PNB	105.29	105.61	28-Aug-25	18.49%
INFY	1487.50	1491.70	28-Aug-25	17.18%
IGL	207.21	207.78	28-Aug-25	16.73%
HEROMOTOCO	4997.90	5011.50	28-Aug-25	16.55%
MANAPPURAM	266.75	267.40	28-Aug-25	14.82%
ONGC	236.29	236.85	28-Aug-25	14.42%
NATIONALUM	188.87	189.30	28-Aug-25	13.85%
INDUSINDBK	760.10	761.75	28-Aug-25	13.21%
POWERGRID	283.35	283.95	28-Aug-25	12.88%
PAGEIND	45655.00	45750.00	28-Aug-25	12.66%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
TVSMOTOR	3294.60	3264.60	28-Aug-25	-55.39%
HAVELLS	1556.00	1552.30	28-Aug-25	-14.47%
AMBUJACEM	577.15	575.80	28-Aug-25	-14.23%
DRREDDY	1277.60	1275.10	28-Aug-25	-11.90%
UPL	716.45	715.10	28-Aug-25	-11.46%
ASHOKLEY	131.20	130.97	28-Aug-25	-10.66%
HINDALCO	704.20	703.15	28-Aug-25	-9.07%
NESTLEIND	1162.90	1161.30	28-Aug-25	-8.37%
RBLBANK	253.15	252.85	28-Aug-25	-7.21%
CHOLAFIN	1524.10	1522.40	28-Aug-25	-6.79%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	116044125	190166475	<b>0.61</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. MARUTI</b>	<b>2. TVSMOTOR</b>	<b>3. ASHOKLEY</b>	<b>4. MRF</b>	<b>5. HEROMOTOCO</b>
<b>6. EXIDEIND</b>	<b>7. BAJAJ-AUTO</b>	<b>8. M&amp;M</b>	<b>9. EICHERMOT</b>	<b>10. TATAMOTORS</b>
<b>11. TORNTPOWER</b>	<b>12. SUZLON</b>	<b>13. JSWENERGY</b>	<b>14. POWERGRID</b>	<b>15. NHPC</b>
<b>16. BHEL</b>				

(Source: [Moneycontrol](#))

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