

Market Snapshot

KEY INDICES	25-Jul-25	18-Jul-25	%Ch
S&P CNX NIFTY	24837.00	24968.40	-0.53
SENSEX	81463.09	81757.73	-0.36
NIFTY MIDCAP 100	58009.45	59104.50	-1.85
NIFTY SMLCAP 100	18294.45	18959.65	-3.51

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

Sectoral Snapshot

KEY INDICES	25-Jul-25	18-Jul-25	%Ch
NIFTY BANK	56528.90	56283.00	0.44
NIFTY AUTO	23781.55	23894.35	-0.47
NIFTY FMCG	54579.95	56506.90	-3.41
NIFTY IT	35623.75	37141.85	-4.09
NIFTY METAL	9425.10	9458.20	-0.35
NIFTY PHARMA	22662.70	22592.75	0.31
NIFTY REALTY	950.60	999.90	-4.93
BSE CG	69136.11	70200.61	-1.52
BSE CD	59563.49	59792.33	-0.38
BSE Oil & GAS	27028.50	27895.17	-3.11
BSE POWER	6707.61	6874.58	-2.43

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

FII & DII Activities (Rs Crore)

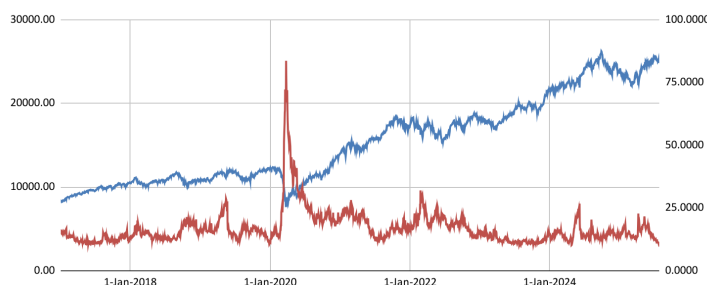
18/07/2025 to 25/07/2025

Activities	FIIs	DIIIs
Buy	91939.12	86358.66
Sell	95782.46	66322.70
Net	-3843.34	20035.96

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Market slides for 4th straight week; Nifty ends below 24,850 mark

The key equity indices ended lower for the week, pressured by disappointing earnings, global uncertainty, and sustained foreign institutional investor (FII) outflows. The week began on a strong note, buoyed by upbeat Q1 results from HDFC Bank and ICICI Bank, which lifted banking and financial stocks. However, market momentum faded midweek as weaker-than-expected IT earnings and stalled U.S.-India trade talks ahead of the August 1 deadline weighed on sentiment. As a result, the Nifty ended below the 24,850 mark, with broader indices underperforming sharply.

In the week ended on Friday, 25 July 2025, the S&P BSE Sensex tanked 294.64 points or 0.36% to settle at 81,463.09. The Nifty 50 index slumped 131.4 points or 0.53% to settle at 24,837. The BSE Mid-Cap index shed 1.46% to close at 45,978.04. The BSE Small-Cap declined 1.88% to end at 53,906.46.

India and the UK signed a landmark Free Trade Agreement on Thursday, aiming to boost annual bilateral trade by \$34

Sensex Gainers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
ICICIBANK	1476.60	1426.50	3.51
HDFCBANK	2004.50	1957.40	2.41
BHARTIARTL	1937.60	1901.05	1.92
TITAN	3459.50	3402.05	1.69
M&M	3246.50	3194.10	1.64

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
NESTLEIND	2275.00	2472.80	-8.00
RELIANCE	1392.10	1476.85	-5.74
TECHM	1461.80	1548.50	-5.60
INDUSINDBK	823.70	870.15	-5.34
INFY	1515.60	1586.55	-4.47

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
UPL	722.20	686.85	5.15
ICICIBANK	1477.10	1425.80	3.60
CIPLA	1532.50	1482.30	3.39
HDFCLIFE	762.35	739.50	3.09
HINDALCO	693.45	675.90	2.60

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
NESTLEIND	2274.60	2472.20	-7.99
RELIANCE	1391.70	1476.00	-5.71
TECHM	1461.90	1548.90	-5.62
INDUSINDBK	823.70	870.05	-5.33
INFY	1515.70	1586.10	-4.44

(Source: Capitaline)

billion. Under the agreement, India will reduce tariffs on 90% of goods imported from the UK, while the UK will eliminate duties on 99% of Indian exports. The pact is expected to benefit key sectors such as leather, textiles, electronics, and software, while also attracting fresh investments between the two nations.

The HSBC India Manufacturing PMI climbed to 59.2 in July 2025 from 58.4 in the previous month, according to preliminary estimates. The latest figure signaled a robust expansion in manufacturing activity and marked the highest reading in nearly 17-and-a-half years, highlighting the sector's continued momentum.

The HSBC India Services PMI declined to 59.4 in July 2025 from 60.4 in the previous month, preliminary readings showed. The latest figure marked a slowdown from the fastest expansion in ten months, as output growth eased compared to the prior month.

The HSBC India Composite PMI fell to 60.7 in July 2025 from a final 61.0 in June, which was a 14-month high, flash data showed. Despite the slight dip, the latest result remained well above its long-run average of 54.8. Services activity rose at a slightly slower pace, though still robust by historical standards, while manufacturing output grew the most since April 2024.

India's core industries, which include eight key sectors, grew by 1.7% in June 2025, improving from a revised growth rate of 1.2% in May but significantly lower than the 5% growth recorded in June 2024. These eight core industries account for 40.27% of the total weight in the Index of Industrial Production (IIP).

India's forex reserves fell \$3.04 billion to \$699.74 billion for the week ending July 4, data by the Reserve Bank of India showed on Friday. For the week ending on July 4, foreign currency assets, a major component of the reserves, decreased \$3.53 billion to \$591.29 billion. Gold reserves were up by \$342 million to stand at \$84.5 billion during the week, the RBI said. The special drawing rights (SDR) were up

Nifty Midcap 100 Gainers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
PAYTM	1067.75	1001.60	6.60
FORTIS	845.55	798.50	5.89
COROMANDEL	2442.80	2311.00	5.70
MAXHEALTH	1280.50	1215.70	5.33
DIXON	16700.00	15960.00	4.64

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	25-Jul-25	18-Jul-25	%Ch
ZEEL	123.70	141.58	-12.63
COFORGE	1688.80	1859.30	-9.17
POONAWALLA	413.30	452.20	-8.60
AUBANK	733.40	794.90	-7.74
OBEROIRLTY	1698.20	1835.00	-7.46

(Source: Capitaline)

World Markets

KEY INDICES	25-Jul-25	18-Jul-25	%Ch
DJIA	44901.92	44342.19	1.26
NASDAQ	21108.32	20895.66	1.02
BOVESPA	133524.19	133381.58	0.11
FTSE 100	9120.31	8992.12	1.43
CAC 40	7834.58	7822.67	0.15
DAX	24217.50	24289.51	-0.30
MOEX RUSSIA	2772.39	2784.63	-0.44
NIKKEI 225	41456.23	39819.11	4.11
HANG SENG	25388.35	24825.66	2.27
STRAITS TIMES	4261.06	4189.50	1.71
SHANGHAI COMPOSITE	3593.66	3534.48	1.67
JAKARTA	7543.50	7311.92	3.17

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

\$39 million to \$18.86 billion. As per the data, India's reserve position with the IMF was also down \$107 million at \$4.73 billion in the reporting week.

Global Markets:

In China The People's Bank of China (PBoC) kept its key loan prime rates unchanged, maintaining the 1-year rate at 3.0% and the 5-year rate at 3.5%.

In Japan the au Jibun Bank Manufacturing PMI fell to 48.8 in July's preliminary reading, down from 50.1 in June. Conversely, the Services PMI rose to 53.5 from 51.7, signaling continued strength in the services sector.

Britain's unemployment rate rose to 4.7% in the three months to May, marking its highest level since 2021.

(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 24760, 24681, 24556, 24482 while levels of 24964, 25089, 25168, 25252 may act as resistance with pivot point at 24885.

(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	24846.80	25026.80	-0.72%	9.80	486480	549552	-11.48%
BANKNIFTY	31-Jul-25	56539.40	56354.20	0.33%	10.50	117950	149536	-21.12%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
TATACHEM	941.40	945.55	31-Jul-25	26.82%
CIPLA	1532.50	1536.40	31-Jul-25	15.48%
AUROPHARMA	1122.80	1125.60	31-Jul-25	15.17%
UPL	722.20	723.85	31-Jul-25	13.90%
COLPAL	2215.90	2220.80	31-Jul-25	13.45%
HCLTECH	1490.10	1493.20	31-Jul-25	12.66%
HINDPETRO	421.80	422.60	31-Jul-25	11.54%
MARICO	693.95	695.25	31-Jul-25	11.40%
MARUTI	12404.00	12427.00	31-Jul-25	11.28%
MUTHOOTFIN	2660.60	2665.50	31-Jul-25	11.20%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	259.20	251.50	31-Jul-25	-180.72%
BPCL	332.90	327.60	31-Jul-25	-96.85%
BOSCHLTD	37830.00	37300.00	31-Jul-25	-85.23%
DLF	826.30	820.25	31-Jul-25	-44.54%
DABUR	511.35	509.15	31-Jul-25	-26.17%
HEROMOTOCO	4230.70	4216.70	31-Jul-25	-20.13%
PAGEIND	46270.00	46150.00	31-Jul-25	-15.78%
AMBUJACEM	613.10	611.60	31-Jul-25	-14.88%
INDIGO	5803.00	5789.50	31-Jul-25	-14.15%
SAIL	130.67	130.39	31-Jul-25	-13.04%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	109740900	190840500	0.58

(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. ICICIBANK	2. HDFCBANK	3. LODHA	4. OBEROIRLT	5. PRESTIGE
6. GODREJPROP	7. BRIGADE	8. SOBHA	9. ANANTRAJ	10. DLF

(Source: [Moneycontrol](#))

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