

Market Snapshot

KEY INDICES	29-May-26	22-May-26	05-Sep-25
S&P CNX NIFTY	23547.75	23719.30	-0.72
SENSEX	74775.74	75415.35	-0.85
NIFTY MIDCAP 100	61723.80	61389.30	0.54
NIFTY SMLCAP 100	18138.80	17956.20	1.02

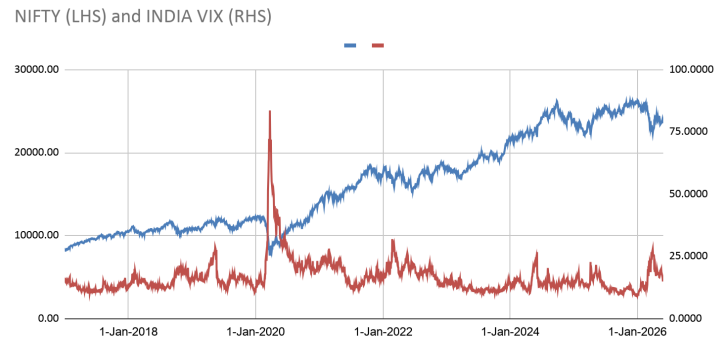
(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	29-May-26	22-May-26	%Ch
NIFTY BANK	54239.20	54055.35	0.34
NIFTY AUTO	26338.45	26017.10	1.24
NIFTY FMCG	49383.35	50249.80	-1.72
NIFTY IT	29080.15	28912.45	0.58
NIFTY METAL	13440.95	13271.60	1.28
NIFTY PHARMA	24345.80	24573.95	-0.93
NIFTY REALTY	782.55	774.40	1.05
BSE CG	80818.74	78316.91	3.19
BSE CD	57685.96	57857.79	-0.30
BSE Oil & GAS	26741.03	27123.88	-1.41
BSE POWER	8383.10	8081.80	3.73

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

Nifty Vs. INDIA VIX



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

Market ends lower after choppy weekly trade

Indian equity markets witnessed a highly volatile week, with benchmark indices ending lower after three consecutive sessions of decline. The week began on a strong note as easing crude oil prices and optimism over a possible US-Iran peace deal triggered broad-based buying, pushing the Nifty above 24,000. However, sentiment turned cautious from Tuesday onward due to fading hopes of quick geopolitical resolution, rising Middle East tensions, and persistent foreign fund outflows. Volatility remained elevated during the week due to monthly F&O expiry and profit booking after the recent rally. On Friday, sharp late-session selling intensified after MSCI index rebalancing took effect, dragging the Nifty below 23,550 amid concerns over geopolitical risks, crude oil volatility, and weaker monsoon expectations. Investors largely remained cautious through the latter half of the week, awaiting greater clarity on global developments before taking fresh directional positions.

In the week ended on Friday, 02 April 2025, the S&P BSE Sensex declined 263.67 points or 0.36% to settle at 73,319.55. The Nifty 50 index slipped 106.50 points or 0.47%

FII & DII Activities (Rs Crore)

22/05/2026 to 29/05/2026

Activities	FIIs	DIIIs
Buy	65112.65	104301.22
Sell	69493.03	72494.24
Net	-4380.38	31806.98

(Source: Capitaline)

Sensex Gainers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
TMPV	393.25	363.40	8.21
TECHM	1483.20	1421.80	4.32
LT	4076.65	3926.85	3.81
HCLTECH	1184.35	1163.75	1.77
SBIN	964.00	949.10	1.57

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
ITC	287.00	301.75	-4.89
HDFCBANK	744.75	766.40	-2.82
TCS	2253.90	2317.25	-2.73
HINDUNILVR	2145.95	2202.00	-2.55
RELIANCE	1320.55	1354.60	-2.51

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
TMPV	393.90	363.35	8.41
TECHM	1483.90	1422.20	4.34
LT	4076.50	3926.60	3.82
EICHERMOT	7177.00	6981.50	2.80
GAIL	164.51	160.77	2.33

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
ONGC	265.40	290.00	-8.48
ITC	286.90	301.70	-4.91
HDFCLIFE	594.80	616.60	-3.54
DIVISLAB	6667.00	6887.00	-3.19
HDFCBANK	744.55	766.80	-2.90

(Source: Capitaline)

to settle at 22,713.10. The BSE 150 MidCap Index shed 0.55% to close at 14,567.37. The BSE 250 SmallCap index rose 0.82% at 5,843.57.

The forecast by the India Meteorological Department that India may receive about 90% of the long-period average rainfall this monsoon suggests a slightly below-normal season, but not a severe shortfall. This level of rainfall is likely to have a moderate impact on the economy, particularly in agriculture, where rain-fed crop output could be affected in some regions. Any uneven distribution of rainfall may lead to localized stress on farm production, which in turn could push up prices of food items such as vegetables, pulses, and cereals. Rural demand may also see some moderation if farm incomes are impacted.

Petrol and diesel prices were raised again on Monday, May 25, 2026, marking the fourth increase in fuel rates within a span of 10 days. State-run oil marketing companies increased prices by an average of Rs 2.80 per litre across the country, pushing retail fuel rates to fresh highs in major metros.

Global Markets:

Global markets witnessed a volatile yet broadly positive week as investor sentiment remained heavily influenced by developments surrounding the US-Iran conflict, easing crude oil prices, and continued strength in US technology stocks.

The week began on a strong note after reports suggested that Washington and Tehran had reached an in-principle understanding to de-escalate tensions. Optimism over a possible reopening of the Strait of Hormuz — a critical route handling nearly 20% of global oil shipments — triggered a sharp decline in crude oil prices and improved global risk appetite. European and Asian equities rallied on Monday, with Japan's Nikkei 225 surging past the 65,000 mark for the first time in history.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
ZEEL	93.11	82.13	13.37
ADANIPOWER	243.37	219.32	10.97
CUMMINSIND	5881.00	5353.00	9.86
JSWENERGY	595.05	551.25	7.95
GUJARATGAS	401.15	373.00	7.55

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	29-May-26	22-May-26	%Ch
CONCOR	463.65	505.90	-8.35
MAXHEALTH	965.10	1023.25	-5.68
FLUOROCHEM	3629.00	3834.00	-5.35
TORNTPOWER	1420.30	1498.50	-5.22
POLICYBZR	1702.50	1792.40	-5.02

(Source: Capitaline)

World Markets

KEY INDICES	29-May-26	22-May-26	%Ch
DJIA	51032.46	50579.70	0.90
NASDAQ	26972.62	26343.97	2.39
BOVESPA	173787.48	176209.61	-1.37
FTSE 100	10409.28	10466.26	-0.54
CAC 40	8183.34	8115.75	0.83
DAX	25104.70	24888.56	0.87
MOEX RUSSIA	2565.61	2625.69	-2.29
NIKKEI 225	66329.50	63339.07	4.72
HANG SENG	25182.39	25606.03	-1.65
STRAITS TIMES	5037.86	5068.15	-0.60
SHANGHAI COMPOSITE	4068.57	4112.90	-1.08
JAKARTA	6127.38	6162.04	-0.56

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

Despite intermittent volatility, Wall Street remained resilient throughout the week. Lower US Treasury yields and continued buying in technology shares supported major US indices. The S&P 500 and Nasdaq Composite repeatedly touched fresh record highs during the week, reflecting sustained optimism around AI-led technology growth and expectations that geopolitical risks may remain contained.

Crude oil prices remained the key macro variable throughout the week. Oil initially declined sharply on hopes of a diplomatic breakthrough but later experienced bouts of volatility amid renewed military actions by both sides. Nevertheless, easing energy prices overall provided relief to global equities and reduced concerns over inflationary pressures.

Overall, global markets ended the week with a cautiously optimistic undertone, supported by resilient US equities, moderating oil prices, and hopes that diplomatic negotiations between the US and Iran could prevent a broader geopolitical escalation.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor upcoming Q4 earnings reports, weaker monsoon expectation, movement in crude oil and gold prices and the US stance on the West Asia conflict. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar 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 23648, 23577, 23483, 23402 while levels of 23813, 23907, 23978, 24102 may act as resistance with pivot point at 23742.

(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-Jun-26	23740.00	23842.00	-0.43%	192.25	688223	363215	89.48%
BANKNIFTY	30-Jun-26	54770.00	54532.00	0.44%	530.80	168888	97268	73.63%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
GLENMARK	2274.90	2305.20	30-Jun-26	15.19%
BOSCHLTD	36625.00	37105.00	30-Jun-26	14.95%
NMDC	87.99	89.11	30-Jun-26	14.52%
GODREJPROP	1762.70	1784.90	30-Jun-26	14.37%
CANBK	130.80	132.44	30-Jun-26	14.30%
BANDHANBNK	208.30	210.91	30-Jun-26	14.29%
EXIDEIND	386.50	391.30	30-Jun-26	14.17%
TVSMOTOR	3355.70	3396.40	30-Jun-26	13.83%
IOC	140.24	141.94	30-Jun-26	13.83%
EICHERMOT	7177.00	7264.00	30-Jun-26	13.83%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
WIPRO	204.25	188.90	30-Jun-26	-85.72%
MUTHOOTFIN	3342.90	3252.40	30-Jun-26	-30.88%
SHREECEM	25275.00	24740.00	30-Jun-26	-24.14%
BAJAJ-AUTO	10460.00	10276.50	30-Jun-26	-20.01%
SIEMENS	3844.00	3804.90	30-Jun-26	-11.60%
HCLTECH	1183.80	1174.90	30-Jun-26	-8.58%
TATASTEEL	208.02	206.48	30-Jun-26	-8.44%
VEDL	352.60	350.10	30-Jun-26	-8.09%
HDFCBANK	744.55	741.00	30-Jun-26	-5.44%
ASHOKLEY	155.44	154.81	30-Jun-26	-4.62%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	63909825	54705770	1.17

(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. THERMAX	2. ADANIPOWER	3. SIEMENS	4. ADANIGREEN	5. POWERINDIA
6. JSWENERGY	7. ABB	8. SUZLON	9. CGPOWER	10. GV&TD
11. ITC	12. COLPAL	13. BRITANNIA	14. HINDUNILVR	15. VBL

(Source: [Moneycontrol](#))

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