

## Market Snapshot

KEY INDICES	29-Aug-25	22-Aug-25	%Ch
S&P CNX NIFTY	24426.85	24870.10	-1.78
SENSEX	79809.65	81306.85	-1.84
NIFTY MIDCAP 100	55727.40	57629.75	-3.30
NIFTY SMLCAP 100	17227.00	17919.50	-3.86

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

## Sectoral Snapshot

KEY INDICES	29-Aug-25	22-Aug-25	%Ch
NIFTY BANK	53655.65	55149.40	-2.71
NIFTY AUTO	24960.85	25329.45	-1.46
NIFTY FMCG	56141.85	55737.45	0.73
NIFTY IT	35181.25	35440.85	-0.73
NIFTY METAL	9154.80	9375.45	-2.35
NIFTY PHARMA	21804.05	22265.00	-2.07
NIFTY REALTY	870.75	909.65	-4.28
BSE CG	65417.08	67151.02	-2.58
BSE CD	60638.17	60673.30	-0.06
BSE Oil & GAS	25540.00	26226.03	-2.62
BSE POWER	6392.75	6567.15	-2.66

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

## FII & DII Activities (Rs Crore)

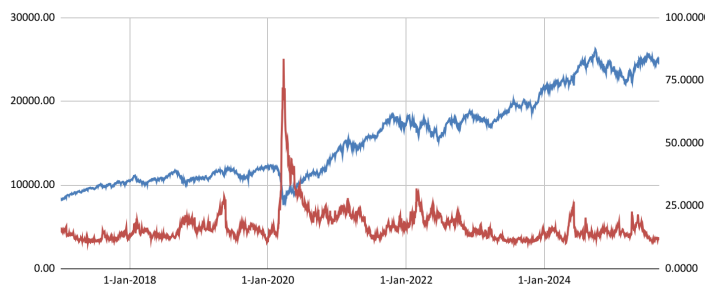
22/08/2025 to 29/08/2025

Activities	FIIs	DII
Buy	96838.38	83547.00
Sell	110354.20	55231.21
Net	-13515.82	28315.79

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Barometers end with deep cuts; Nifty closes below 24,450 mark

The domestic equity indices ended the truncated week with sharp losses, as sentiment was dampened by U.S. tariffs on Indian goods. Washington imposed 25% duties on key exports, fueling concerns over escalating trade tensions and economic fallout. Investors will monitor the crude oil prices and FII fund flows. The broader market underperformed the frontline indices.

In the week ended on Friday, 29 August 2025, the S&P BSE Sensex declined 1,497.20 points or 1.84% to settle at 79,809.65. The Nifty 50 index tumbled 443.25 points or 1.78% to settle at 24,426.85. The BSE Mid-Cap index plunged 2.72% to close at 44,642.31. The BSE Small-Cap index dropped 2.93% to end at 51,449.23.

Fitch Ratings has affirmed India's Long-Term Foreign-Currency Issuer Default Rating at 'BBB-' with a Stable Outlook. While upcoming U.S. tariffs pose a moderate downside risk, Fitch notes the situation remains uncertain. The Trump administration plans to impose a 50% tariff on Indian goods starting August 27.

## Sensex Gainers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
MARUTI	14789.95	14351.05	<b>3.06</b>
ITC	409.75	398.30	<b>2.87</b>
HINDUNILVR	2660.00	2628.85	<b>1.18</b>
TCS	3084.40	3053.65	<b>1.01</b>
ASIANPAINT	2517.40	2504.20	<b>0.53</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
M&M	3198.15	3402.55	<b>-6.01</b>
RELIANCE	1357.05	1409.30	<b>-3.71</b>
HDFCBANK	951.45	982.38	<b>-3.15</b>
SUNPHARMA	1594.05	1642.90	<b>-2.97</b>
POWERGRID	275.35	283.35	<b>-2.82</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
BRITANNIA	5824.00	5545.50	<b>5.02</b>
MARUTI	14791.00	14349.00	<b>3.08</b>
EICHERMOT	6103.00	5924.50	<b>3.01</b>
ITC	409.75	398.30	<b>2.87</b>
HEROMOTOCO	5087.70	4997.90	<b>1.80</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
M&M	3199.50	3403.00	<b>-5.98</b>
RELIANCE	1357.20	1409.20	<b>-3.69</b>
HDFCBANK	951.60	982.30	<b>-3.13</b>
SUNPHARMA	1594.50	1641.80	<b>-2.88</b>
SBILIFE	1805.50	1859.00	<b>-2.88</b>

(Source: Capitaline)

India's industrial production growth quickened to 3.5% in July from 1.5% in June, data released by the National Statistical Office (NSO) on Thursday showed. The growth rates of the three sectors, Mining, Manufacturing and Electricity for the month of July 2025 are (-) 7.2%, 5.4% and 0.6%, respectively.

President Trump's secondary U.S. tariffs of 25% on Indian shipments kicked in Wednesday, pushing overall duties on the country's exports to 50%.

A global research house has reportedly stated that the risks to growth for the Indian economy have naturally become more real.

India's top exports to the U.S., which are electrical machinery as well as gems and jewellery, face the largest tariff increases, the report stated. Trade talks between the Indian and U.S. delegations, however, are expected to continue.

### Global Markets:

South Korea's central bank kept its policy rate unchanged at 2.5% for its second straight meeting despite an uncertain trade environment for the country.

Federal Reserve Chair Jerome Powell signalled that the central bank could begin easing monetary policy next month. In a tepid speech at the central bank's annual conclave in Jackson Hole, Wyoming, Powell said that "the baseline outlook and the shifting balance of risks may warrant adjusting our policy stance." The Fed chief added that "the balance of risks appear to be shifting" between the central bank's dual mandate of full employment and stable prices. He cited "sweeping changes" in tax, trade and immigration policies.

(Source: Capitaline)

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
CROMPTON	330.00	316.70	4.20
DALBHARAT	2401.50	2326.40	3.23
CGPOWER	694.30	679.85	2.13
DEVYANI	174.22	171.27	1.72
HONAUT	38740.00	38090.00	1.71

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	29-Aug-25	22-Aug-25	%Ch
IDEA	6.49	7.07	-8.20
UNIONBANK	124.82	134.76	-7.38
POLICIBZR	1770.80	1911.20	-7.35
POONAWALLA	431.55	465.50	-7.29
RECLTD	350.00	375.60	-6.82

(Source: Capitaline)

## World Markets

KEY INDICES	29-Aug-25	22-Aug-25	%Ch
DJIA	45544.88	45631.74	-0.19
NASDAQ	21455.55	21496.54	-0.19
BOVESPA	141422.27	137968.16	2.50
FTSE 100	9187.34	9321.40	-1.44
CAC 40	7703.90	7969.69	-3.34
DAX	23902.21	24363.09	-1.89
MOEX RUSSIA	2899.38	2896.76	0.09
NIKKEI 225	42718.47	42633.29	0.20
HANG SENG	25077.62	25339.14	-1.03
STRAITS TIMES	4269.70	4253.02	0.39
SHANGHAI COMPOSITE	3857.93	3825.76	0.84
JAKARTA	7830.49	7858.85	-0.36

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

## 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 24364, 24300, 24196, 24022 while levels of 24531, 24636, 24752, 24982 may act as resistance with pivot point at 24468.

(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	24577.30	25037.00	-1.84%	150.45	664404	122925	440.50%
BANKNIFTY	30-Sep-25	54100.00	55576.00	-2.66%	444.35	187539	31577	493.91%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PETRONET	269.50	271.35	30-Sep-25	7.83%
NAUKRI	1358.10	1367.40	30-Sep-25	7.81%
HDFCBANK	951.60	958.10	30-Sep-25	7.79%
SRF	2836.40	2855.60	30-Sep-25	7.72%
JSWSTEEL	1026.60	1033.40	30-Sep-25	7.56%
AXISBANK	1045.20	1052.10	30-Sep-25	7.53%
RECLTD	350.00	352.30	30-Sep-25	7.50%
TORNTPHARM	3559.80	3583.10	30-Sep-25	7.47%
AUROPHARMA	1027.90	1034.60	30-Sep-25	7.43%
IOC	136.62	137.51	30-Sep-25	7.43%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
VOLTAS	1374.00	1353.90	30-Sep-25	-16.69%
UPL	715.75	708.15	30-Sep-25	-12.11%
NATIONALUM	186.18	184.53	30-Sep-25	-10.11%
SAIL	118.66	117.61	30-Sep-25	-10.09%
WIPRO	249.41	247.81	30-Sep-25	-7.32%
IGL	206.74	205.64	30-Sep-25	-6.07%
DRREDDY	1260.10	1255.00	30-Sep-25	-4.62%
NTPC	327.55	326.25	30-Sep-25	-4.53%
ONGC	233.71	233.02	30-Sep-25	-3.37%
PAGEIND	44335.00	44260.00	30-Sep-25	-1.93%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	48203175	41168925	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. BRITANNIA	2. ITC	3. COLPAL	4. HINDUNILVR	5. ANATRAJ
6. LODHA	7. GODREJPROP	8. PHOENIXLL	9. PRESTIGE	10. BRIGADE
11. RAYMOND	12. SOBHA	13. DLF	14. OBEROIRLTY	

(Source: [Moneycontrol](#))

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