

Market Snapshot

KEY INDICES	30-May-25	23-May-25	%Ch
S&P CNX NIFTY	24750.70	24853.15	-0.41
SENSEX	81451.01	81721.08	-0.33
NIFTY MIDCAP 100	57420.00	56687.75	1.29
NIFTY SMLCAP 100	17883.30	17643.35	1.36

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

Sectoral Snapshot

KEY INDICES	30-May-25	23-May-25	%Ch
NIFTY BANK	55749.70	55398.25	0.63
NIFTY AUTO	23325.60	23515.25	-0.81
NIFTY FMCG	55283.00	56502.05	-2.16
NIFTY IT	37321.75	37403.55	-0.22
NIFTY METAL	9193.25	9249.60	-0.61
NIFTY PHARMA	21442.05	21434.25	0.04
NIFTY REALTY	949.35	936.85	1.33
BSE CG	71089.64	69246.03	2.66
BSE CD	57946.66	58275.79	-0.56
BSE Oil & GAS	27030.06	27220.27	-0.70
BSE POWER	6804.84	6806.71	-0.03

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

FII & DII Activities (Rs Crore)

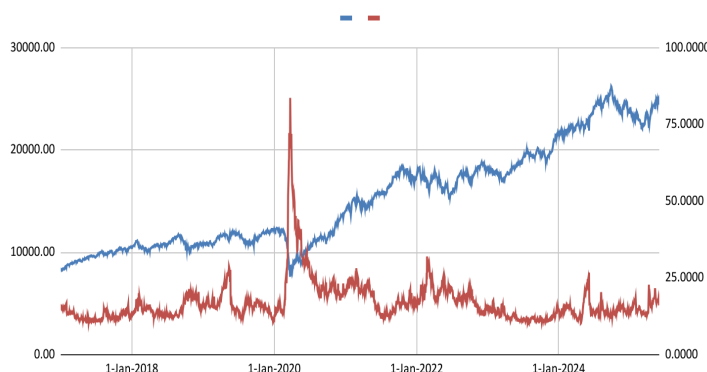
23/05/2025 to 30/05/2025

Activities	FIIs	DIIIs
Buy	88155.10	91216.61
Sell	87566.75	57772.05
Net	588.35	33444.56

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Markets extend losses for second week amid global concerns

The domestic equity benchmarks ended with moderate losses this week, driven by profit booking, global uncertainties, and cautious investor sentiment ahead of key economic data. The market was in the green for two sessions—Monday and Thursday—boosted by the Reserve Bank of India's record Rs 2.68 lakh crore dividend payout, which eased fiscal concerns and lifted investor confidence. However, the remaining three sessions saw declines, as rising U.S. Treasury yields, global trade tensions, and elevated valuations triggered profit booking and risk aversion.

In the week ended on Friday, 30 May 2025, the S&P BSE Sensex declined 270.07 points or 0.33% to settle at 81,451.01. The Nifty 50 index lost 102.45 points or 0.41% to settle at 24,750.70. The BSE Mid-Cap index added 0.61% to close at 45,136.35. The BSE Small-Cap index rallied 1.73% to end at 52,413.25. Despite the weakness in frontline indices, the broader market outperformed, with the BSE Mid-Cap

Sensex Gainers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
INDUSINDBK	817.10	793.35	2.99
SBIN	812.40	790.45	2.78
LT	3675.75	3599.95	2.11
BHARTIARTL	1856.80	1832.10	1.35
WIPRO	249.70	247.45	0.91

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
ULTRACEMCO	11197.25	11740.65	-4.63
ITC	417.90	436.30	-4.22
NTPC	334.25	344.50	-2.98
POWERGRID	289.90	298.05	-2.73
ASIANPAINT	2260.05	2314.60	-2.36

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
INDUSINDBK	816.95	793.40	2.97
SBIN	812.30	790.50	2.76
ADANIPORTS	1432.80	1395.40	2.68
LT	3675.10	3599.90	2.09
DIVISLAB	6612.00	6483.00	1.99

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
SHREECEM	29595.00	31495.00	-6.03
ULTRACEMCO	11210.00	11746.00	-4.56
GRASIM	2545.80	2659.40	-4.27
ITC	418.05	436.30	-4.18
NTPC	333.90	344.60	-3.11

(Source: Capitaline)

and Small-Cap indices gaining 0.61% and 1.73% respectively, supported by strong domestic cues such as a favourable monsoon outlook and improving inflation and growth expectations.

The Reserve Bank of India (RBI) on Friday handed the government a whopping Rs 2.68 lakh crore in surplus for FY25, 27% more than last year and even higher than what the Union Budget had estimated.

India's industrial output growth slowed to 2.7% in April, as against the revised growth of 3% in the preceding month of March. Manufacturing output advanced 3.4% in April as against 4% in the previous month, while electricity generation increased to 1.1% from 7.5% in March. Mining activity contracted by 0.2% in April from an expansion of 1.2% a month ago.

Meanwhile, foreign direct investment in India fell 24.5% year-on-year to \$9.34 billion in the January-March quarter of 2024-25 but grew 13% at \$50 billion during the entire previous financial year. FDI inflows during January-March 2023-24 stood at \$12.38 billion.

The India Meteorological Department (IMD) issued its updated Long-Range Forecast for the 2025 Southwest Monsoon season (June-September) along with the Monthly Rainfall and Temperature Outlook for June 2025. According to the forecast, the seasonal rainfall across the country as a whole is likely to be 106% of the Long Period Average (LPA), with a model error of $\pm 4\%$, indicating a high probability of above-normal rainfall during the monsoon season.

Regionally, the rainfall is most likely to be above normal over Central India and the South Peninsular region, while Northwest India is expected to experience normal rainfall levels (ranging between 92-108% of LPA). In contrast, Northeast India is likely to receive below-normal rainfall (<94% of LPA).

The Reserve Bank of India (RBI), in its annual report, projected that the Indian economy is likely to maintain its

Nifty Midcap 100 Gainers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
CUMMINSIND	3268.10	2940.40	11.14
CONCOR	784.40	720.90	8.81
PAYTM	890.45	843.95	5.51
PNB	105.82	100.38	5.42
UNIONBANK	146.79	140.43	4.53

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	30-May-25	23-May-25	%Ch
FLUOROCHEM	3553.30	4025.80	-11.74
BALKRISIND	2472.20	2660.20	-7.07
DEVYANI	167.59	179.68	-6.73
DALBHARAT	2016.40	2143.00	-5.91
ESCORTS	3321.70	3510.60	-5.38

(Source: Capitaline)

World Markets

KEY INDICES	30-May-25	23-May-25	%Ch
DJIA	42270.07	41603.07	1.60
NASDAQ	19113.77	18737.21	2.01
BOVESPA	137026.62	137824.30	-0.58
FTSE 100	8772.38	8717.97	0.62
CAC 40	7751.89	7734.40	0.23
DAX	23997.48	23629.58	1.56
MOEX RUSSIA	2828.83	2770.10	2.12
NIKKEI 225	37965.10	37160.47	2.17
HANG SENG	23289.77	23601.26	-1.32
STRAITS TIMES	3894.61	3882.42	0.31
SHANGHAI COMPOSITE	3347.49	3348.37	-0.03
JAKARTA	CLOSED	7214.16	-

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

position as the fastest-growing major economy in FY2025-26. However, the RBI cautioned that financial markets may face intermittent volatility, particularly in response to global uncertainties like shifting trade tariff policies and rising geopolitical tensions.

Global Markets:

U.S. federal trade court ruled that President Donald Trump exceeded his authority with his reciprocal tariffs, dealing a blow to a major tenet of the president's economic agenda. The court ruled that Trump had overstepped his authority by imposing tariffs on over 180 countries and territories back in April.

On Wednesday, the U.S. Court of International Trade ruled that Trump had exceeded his authority in imposing the so-called "reciprocal" tariffs and ordered them to be vacated.

(Source: Capitaline)

Outlook and Technical View

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 24523, 24192, 23922, 23752 while levels of 25123, 25393, 25724, 25992 may act as resistance with pivot point at 24793.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	26-Jun-25	24852.00	24976.00	-0.50%	101.30	520800	327966	58.80%
BANKNIFTY	26-Jun-25	56082.00	55751.60	0.59%	332.30	122844	29878	311.15%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
RBLBANK	213.07	214.68	26-Jun-25	10.21%
BANKBARODA	249.55	251.41	26-Jun-25	10.08%
SBIN	812.30	818.05	26-Jun-25	9.57%
GLENMARK	1457.10	1467.40	26-Jun-25	9.56%
APOLLOHOSP	6880.50	6926.50	26-Jun-25	9.04%
TECHM	1573.90	1584.40	26-Jun-25	9.02%
EICHERMOT	5333.50	5369.00	26-Jun-25	9.00%
BHARTIARTL	1856.20	1868.50	26-Jun-25	8.96%
AXISBANK	1192.20	1200.10	26-Jun-25	8.96%
IDFCFIRSTB	67.97	68.42	26-Jun-25	8.95%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
TATACHEM	887.15	879.45	26-Jun-25	-11.73%
PEL	1108.20	1101.20	26-Jun-25	-8.54%
LT	3675.10	3656.20	26-Jun-25	-6.95%
VOLTAS	1262.80	1256.50	26-Jun-25	-6.74%
HINDUNILVR	2348.30	2338.60	26-Jun-25	-5.58%
TATAMOTORS	719.50	716.70	26-Jun-25	-5.26%
TCS	3463.40	3454.50	26-Jun-25	-3.47%
ASIANPAINT	2259.10	2253.30	26-Jun-25	-3.47%
TATAPOWER	392.80	392.05	26-Jun-25	-2.58%
DRREDDY	1251.20	1249.80	26-Jun-25	-1.51%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	45503875	40675025	1.12

(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. ITC	2. UNITDSPR	3. GODREJCP	4. TATACONSUM	5. VBL
6. SUZLON	7. POWERINDIA	8. ELGIEQUIP	9. CUMMINSIND	10. NBCC
11. AIAENG	12. TIMKEN	13. BDL	14. INOXWIND	

(Source: [Moneycontrol](#))

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