

Market Snapshot

KEY INDICES	07-Mar-25	28-Feb-25	%Ch
S&P CNX NIFTY	22552.50	22124.70	1.93
SENSEX	74332.58	73198.10	1.55
NIFTY MIDCAP 100	49190.60	47915.20	2.66
NIFTY SMLCAP 100	15504.30	14700.20	5.47

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

Sectoral Snapshot

KEY INDICES	07-Mar-25	28-Feb-25	%Ch
NIFTY BANK	48497.50	48344.70	0.32
NIFTY AUTO	21009.70	20498.60	2.49
NIFTY FMCG	51891.80	50689.00	2.37
NIFTY IT	37820.45	37318.30	1.35
NIFTY METAL	8926.90	8219.25	8.61
NIFTY PHARMA	20378.30	19813.50	2.85
NIFTY REALTY	816.35	797.90	2.31
BSE CG	58911.86	55241.12	6.64
BSE CD	53975.12	52964.97	1.91
BSE Oil & GAS	23833.79	22573.53	5.58
BSE POWER	6152.62	5763.16	6.76

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

FII & DII Activities (Rs Crore)

28/02/2025 to 07/03/2025

Activities	FIIs	DIIIs
Buy	112851.17	97749.62
Sell	136484.31	64490.10
Net	-23633.14	33259.52

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Barometers snap 4-week losing streak; broader market outperforms

The headline equity benchmarks witnessed significant gains during the week, snapping a four-week losing streak, fueled by India's strong GDP growth of 6.2% in Q3 FY25 and rising GST collections, which boosted investor confidence. However, global uncertainties, such as weak U.S. economic data, slowing exports in China, and recession concerns, created market fluctuations. Overall, the market faced mixed signals from strong domestic fundamentals and external risks. Positive performances in mid and small-cap stocks provided support for the market.

In the week ended on Friday, 07 March 2025, the S&P BSE Sensex soared 1,134.48 points or 1.55% to settle at 74,332.58. The Nifty 50 index climbed 427.8 points or 1.93% to settle at 22,552.50. The BSE Mid-Cap index rallied 3.35% to close at 39,888.29. The BSE Small-Cap index jumped 5.85% to end at 45,606.86.

India's real GDP picked pace sequentially to grow 6.2% in October-December 2024 (Q3 of 2024-25 or FY25) compared

Sensex Gainers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
TATASTEEL	151.55	137.20	10.46
SBIN	732.75	688.25	6.47
NTPC	329.35	310.95	5.92
M&M	2728.20	2584.00	5.58
POWERGRID	263.20	250.65	5.01

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
INDUSINDBK	936.80	988.95	-5.27
HDFCBANK	1689.35	1731.10	-2.41
MARUTI	11665.45	11945.00	-2.34
BAJFINANCE	8404.55	8542.25	-1.61
BAJAJFINSV	1846.85	1873.00	-1.40

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
TATASTEEL	151.56	137.20	10.47
BPCL	261.26	237.30	10.10
IOC	124.84	113.49	10.00
HINDALCO	691.35	634.35	8.99
ADANI PORTS	1144.50	1069.40	7.02

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
INDUSINDBK	936.75	990.10	-5.39
BAJAJ-AUTO	7574.75	7902.90	-4.15
HDFCBANK	1689.25	1732.40	-2.49
MARUTI	11664.15	11945.85	-2.36
BAJFINANCE	8404.50	8530.30	-1.47

(Source: Capitaline)

with 5.6% in July-September 2024 (Q2), aided by accelerating consumption demand, quarterly GDP estimates released by the National Statistics Office showed Friday. In Q3 of 2023-24, the GDP had grown 9.5%.

India's gross GST collections rose by 9.1% to about Rs 1.84 lakh crore in February.

The production growth in India's eight key infrastructure sectors grew by 4.6% year-on-year in January, slightly slower than the 4.8% growth recorded in December.

India's HSBC India Manufacturing Purchasing Managers Index (PMI), compiled by S&P Global, fell to 56.3 in February from 57.7 in January while the services PMI Business Activity Index rose from January's 26-month low of 56.5 to 59.0 in February. The Composite Output Index rose from 57.7 to 58.8.

Maruti Suzuki India total production increased 0.98% to 199,400 units in February 2025 as against 197,471 units recorded in February 2024.

Tata Motors sales tumbled 8.17% to 79,344 units in February 2025 as compared with 86,406 units in February 2024.

Bajaj Auto reported 2% increase in total auto sales to 3,52,071 units in February 2025 as against 3,46,662 units in February 2024.

M&M overall auto sales grew by 14.78% to 83,702 vehicles sold in February 2025 as against 72,923 vehicles sold in February 2024.

Eicher Motors, VE Commercial Vehicles (VECV), reported a 9% year-on-year growth in commercial vehicle (CV) sales to 8,092 units in February 2025.

TVS Motor Company total sales jumped 10% to 403,976 units in February 2025 as against 368,424 units in February 2024.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
HINDPETRO	332.45	293.75	13.17
RECLTD	406.20	360.30	12.74
MSUMI	52.55	47.00	11.81
ZEEL	103.97	93.09	11.69
BIOCON	333.70	302.45	10.33

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	07-Mar-25	28-Feb-25	%Ch
POLICYBZR	1397.80	1463.60	-4.50
PAYTM	684.85	714.95	-4.21
AUBANK	544.30	565.70	-3.78
JUBLFOOD	602.80	626.10	-3.72
OFSS	7569.10	7763.90	-2.51

(Source: Capitaline)

World Markets

KEY INDICES	07-Mar-25	28-Feb-25	%Ch
DJIA	42801.72	43840.91	-2.37
NASDAQ	18196.22	18847.28	-3.45
BOVESPA	125034.63	122799.09	1.82
FTSE 100	8679.88	8809.74	-1.47
CAC 40	8120.80	8111.63	0.11
DAX	23008.94	22551.43	2.03
MOEX RUSSIA	3166.88	3200.48	-1.05
NIKKEI 225	36887.17	37155.50	-0.72
HANG SENG	24231.30	22941.32	5.62
STRAITS TIMES	3914.48	3895.70	0.48
SHANGHAI COMPOSITE	3372.55	3320.90	1.56
JAKARTA	6636.00	6270.60	5.83

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

Ashok Leyland reported 2% rise in total commercial vehicle sales to 17,903 units in February 2025 from 17,632 units sold in February 2024.

Global Markets:

China's Caixin Manufacturing PMI climbed to 50.8 in February, from January's 50.1. The services PMI came in at 51.4 in February.

China set its GDP growth target for 2025 at around 5%. The country has also lowered its inflation expectations to "around 2%."

China's exports in the January to February period rose 2.3% in U.S. dollar terms from a year earlier.

U.S. jobless claims fell more than expected last week to 221,000, signaling a strong labor market. For the week ending February 22, initial claims under the Unemployment Compensation for Federal Employees program rose to 1,634, up from 614 the previous week.

(Source: Capitaline)

Outlook and Technical View

U.S. Donald Trump Tariffs rhetoric may continue to hog limelight. 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 22466, 22381, 22297, 22202 while levels of 22635, 22719, 22804, 22898 may act as resistance with pivot point at 22550.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	27-Mar-25	22639.00	22272.05	1.65%	86.50	722181	716238	0.83%
BANKNIFTY	27-Mar-25	48625.00	48587.10	0.08%	127.50	189540	222542	-14.83%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDEA	7.55	7.59	27-Mar-25	9.67%
AUROPHARMA	1097.40	1102.80	27-Mar-25	8.98%
TITAN	3079.35	3094.25	27-Mar-25	8.83%
HINDPETRO	332.45	334.00	27-Mar-25	8.51%
CONCOR	656.65	659.70	27-Mar-25	8.48%
ADANIENT	2247.50	2257.85	27-Mar-25	8.40%
MRF	107202.95	107695.45	27-Mar-25	8.38%
MARICO	609.65	612.40	27-Mar-25	8.23%
CUMMINSIND	2899.05	2912.10	27-Mar-25	8.22%
TORNTPOWER	1332.00	1337.95	27-Mar-25	8.15%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	40067.15	39573.20	27-Mar-25	-22.50%
CHOLAFIN	1457.35	1448.15	27-Mar-25	-11.52%
WIPRO	284.80	283.45	27-Mar-25	-8.65%
IGL	188.49	187.80	27-Mar-25	-6.68%
BEL	276.99	276.04	27-Mar-25	-6.26%
LUPIN	2030.00	2027.10	27-Mar-25	-2.61%
NATIONALUM	195.17	194.96	27-Mar-25	-1.96%
SRF	2935.35	2934.10	27-Mar-25	-0.78%
EICHERMOT	5100.70	5099.95	27-Mar-25	-0.27%
IOC	124.84	124.83	27-Mar-25	-0.15%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	63115075	61906625	1.02

(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. VEDL	2. JSL	3. HINDCOPPER	4. TATASTEEL	5. NATIONALUM
6. HINDZINC	7. HINDALCO	8. WELCORP	9. NMDC	10. ADANIANT
11. JSWSTEEL	12. JINDALSTEL			

(Source: [Moneycontrol](#))

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