

Market Snapshot

| KEY INDICES | 14-Feb-25 | 07-Feb-25 | %Ch |
|------------------|-----------|-----------|-------|
| S&P CNX NIFTY | 22929.25 | 23559.95 | -2.68 |
| SENSEX | 75939.21 | 77860.19 | -2.47 |
| NIFTY MIDCAP 100 | 49654.15 | 53609.15 | -7.38 |
| NIFTY SMLCAP 100 | 15407.20 | 17006.85 | -9.41 |

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

Sectoral Snapshot

| KEY INDICES | 14-Feb-25 | 07-Feb-25 | %Ch |
|---------------|-----------|-----------|-------|
| NIFTY BANK | 49099.45 | 50158.85 | -2.11 |
| NIFTY AUTO | 22069.30 | 23459.95 | -5.93 |
| NIFTY FMCG | 53138.55 | 55113.30 | -3.58 |
| NIFTY IT | 41311.15 | 42921.65 | -3.75 |
| NIFTY METAL | 8187.50 | 8585.80 | -4.64 |
| NIFTY PHARMA | 20811.55 | 22077.00 | -5.73 |
| NIFTY REALTY | 831.45 | 917.70 | -9.40 |
| BSE CG | 57349.10 | 61074.90 | -6.10 |
| BSE CD | 54686.28 | 59054.04 | -7.40 |
| BSE Oil & GAS | 23352.42 | 24909.45 | -6.25 |
| BSE POWER | 5826.15 | 6264.24 | -6.99 |

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

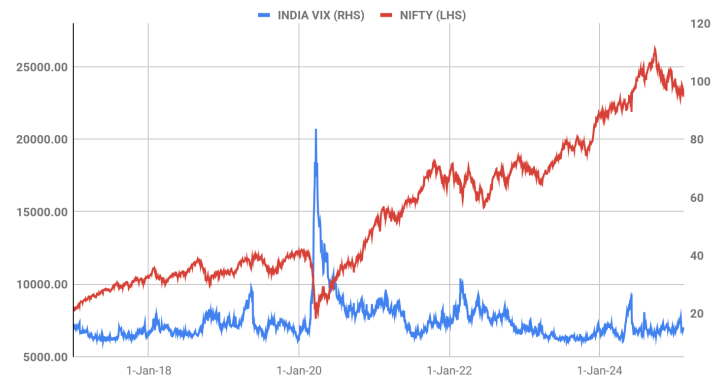
FII & DII Activities (Rs Crore)

07/02/2025 to 14/02/2025

| Activities | FIIs | DIIIs |
|------------|-----------|----------|
| Buy | 75271.21 | 77108.35 |
| Sell | 92796.05 | 57909.13 |
| Net | -17524.84 | 19199.22 |

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Sensex, Nifty plunges for 2nd week; broader market underperforms

The key equity indices witnessed selling pressure during the week following U.S. President Trump's announcement of a 25% tariff on steel and aluminum imports. The move, which included reciprocal tariffs on countries like India, raised concerns about higher costs for Indian exports to the U.S. and potential trade disruptions. The Indian rupee also hit an all-time low amid the uncertainty this week. With trade negotiations ongoing, investor sentiment remained cautious as the full impact of the tariffs unfolded.

In the week ended on Friday, 14 February 2025, the S&P BSE Sensex tanked 1,920.98 points or 2.47% to settle at 75,939.21. The Nifty 50 index dropped 630.7 points or 2.68% to settle at 22,929.25. The BSE Mid-Cap index dropped 7.70% to close at 39,731.79. The BSE Small-Cap index slumped 9.47% to end at 45,411.25.

India's forex reserves raised USD 1.05 billion to USD 630.607 billion for the week ended January 31, the RBI said on

Sensex Gainers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|-------------------|-----------|-----------|-------------|
| BAJAJFINSV | 1840.45 | 1797.55 | 2.39 |
| BHARTIARTL | 1717.15 | 1677.80 | 2.35 |
| KOTAKBANK | 1952.10 | 1936.15 | 0.82 |
| ICICIBANK | 1258.45 | 1256.90 | 0.12 |

(Source: Capitaline)

Sensex Losers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|-------------------|-----------|-----------|--------------|
| M&M | 2940.75 | 3197.75 | -8.04 |
| POWERGRID | 257.35 | 278.30 | -7.53 |
| TITAN | 3212.10 | 3424.15 | -6.19 |
| NTPC | 300.25 | 316.85 | -5.24 |
| INDUSINDBK | 1024.25 | 1079.40 | -5.11 |

(Source: Capitaline)

Nifty Gainers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|-------------------|-----------|-----------|-------------|
| BHARTIARTL | 1717.05 | 1676.75 | 2.40 |
| BAJAJFINSV | 1841.30 | 1798.35 | 2.39 |
| BRITANNIA | 4939.65 | 4870.50 | 1.42 |
| KOTAKBANK | 1952.40 | 1929.25 | 1.20 |
| SHREECEM | 28556.05 | 28249.10 | 1.09 |

(Source: Capitaline)

Nifty Losers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|-------------------|-----------|-----------|---------------|
| EICHERMOT | 4703.35 | 5372.55 | -12.46 |
| HEROMOTOCO | 3862.40 | 4274.65 | -9.64 |
| M&M | 2942.60 | 3198.45 | -8.00 |
| POWERGRID | 257.35 | 278.15 | -7.48 |
| ONGC | 230.50 | 248.90 | -7.39 |

(Source: Capitaline)

Friday. In the previous reporting week, the overall reserves had increased by USD 5.574 billion to USD 629.557 billion. This is the second consecutive week of an increase in the reserves, which have otherwise been on a declining trend for the last few weeks due to revaluation along with possible forex market interventions by RBI to help reduce volatility in the rupee, as stated by the Governor in the RBI monetary policy meeting.

India's retail inflation, based on the Consumer Price Index (CPI), eased to a five-month low of 4.31% in January 2025, mainly due to lower food prices, according to official data released on Wednesday. CPI-based retail inflation was 5.22% in December and 5.1% in January 2024.

Wholesale price inflation moderated to 2.31% in January 2025 due to the decline in price of food items, especially vegetables, government data released on Friday showed. The wholesale price index (WPI)-based inflation was 2.37% in December 2024. It was 0.33% in January 2024.

Global Markets:

China's Consumer Price Index (CPI) increased by 0.5% in January compared to the same month last year, according to the National Bureau of Statistics. This marks a rise from the 0.1% gain recorded in December.

The CPI increased by 0.5% month-over-month while the core CPI rose by 0.4%. These results fueled concerns about persistent inflationary pressures. Analysts pointed to the "upside surprise" in the CPI report, noting that it contradicted earlier forecasts of moderating inflation. The producer price index (PPI) for January rose 0.4% month-on-month, exceeding forecasts. On an annual basis, PPI held steady at 3.5%.

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|----------|-----------|-----------|-------------|
| ASHOKLEY | 213.85 | 212.05 | 0.85 |

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

| SCRIPS | 14-Feb-25 | 07-Feb-25 | %Ch |
|------------|-----------|-----------|---------------|
| DEEPAKNTR | 1900.50 | 2350.95 | -19.16 |
| DELHIVERY | 266.25 | 315.10 | -15.50 |
| LAURUSLABS | 546.20 | 641.35 | -14.84 |
| GUJRATGAS | 393.50 | 460.80 | -14.61 |
| OBEROIRLTY | 1570.65 | 1824.85 | -13.93 |

(Source: Capitaline)

World Markets

| KEY INDICES | 14-Feb-25 | 07-Feb-25 | %Ch |
|--------------------|-----------|-----------|--------------|
| DJIA | 44546.08 | 44303.40 | 0.55 |
| NASDAQ | 20026.77 | 19523.40 | 2.58 |
| BOVESPA | 128218.59 | 124619.40 | 2.89 |
| FTSE 100 | 8732.46 | 8700.53 | 0.37 |
| CAC 40 | 8178.54 | 7973.03 | 2.58 |
| DAX | 22513.42 | 21787.00 | 3.33 |
| MOEX RUSSIA | 3185.00 | 2966.53 | 7.36 |
| NIKKEI 225 | 39149.43 | 38787.02 | 0.93 |
| HANG SENG | 22620.33 | 21133.54 | 7.04 |
| STRAITS TIMES | 3877.50 | 3861.42 | 0.42 |
| SHANGHAI COMPOSITE | 3346.72 | 3303.67 | 1.30 |
| JAKARTA | 6638.46 | 6742.58 | -1.54 |

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

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 22758, 22587, 22399, 22202 while levels of 23117, 23305, 23476, 24642 may act as resistance with pivot point at 22946.

(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-Feb-25 | 22972.30 | 23622.85 | -2.75% | 43.05 | 695424 | 670440 | 3.73% |
| BANKNIFTY | 27-Feb-25 | 49288.00 | 50381.00 | -2.17% | 188.55 | 211930 | 175354 | 20.86% |

(Source: [NSE](#))

COST OF CARRY

Positive

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|-------------|------------|--------------|-------------|---------------|
| ADANI PORTS | 1062.70 | 1066.95 | 27-Feb-25 | 11.23% |
| SUN PHARMA | 1700.50 | 1706.65 | 27-Feb-25 | 10.15% |
| BRITANNIA | 4939.65 | 4957.45 | 27-Feb-25 | 10.12% |
| SAIL | 105.71 | 106.09 | 27-Feb-25 | 10.09% |
| BPCL | 251.00 | 251.90 | 27-Feb-25 | 10.07% |
| RBL BANK | 156.82 | 157.36 | 27-Feb-25 | 9.67% |
| ICICI BANK | 1260.10 | 1264.40 | 27-Feb-25 | 9.58% |
| MARICO | 633.75 | 635.90 | 27-Feb-25 | 9.53% |
| BERGEPAINT | 478.30 | 479.90 | 27-Feb-25 | 9.39% |
| BIOCON | 349.35 | 350.50 | 27-Feb-25 | 9.24% |

(Source: [NSE](#))

Negative

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|------------|------------|--------------|-------------|---------------|
| SHREECEM | 28556.05 | 28235.40 | 27-Feb-25 | -31.53% |
| DRREDDY | 1197.05 | 1190.05 | 27-Feb-25 | -16.42% |
| IGL | 185.67 | 184.91 | 27-Feb-25 | -11.49% |
| MANAPPURAM | 178.15 | 177.55 | 27-Feb-25 | -9.46% |
| GODREJCP | 1058.90 | 1056.15 | 27-Feb-25 | -7.29% |
| CHOLAFIN | 1376.00 | 1373.35 | 27-Feb-25 | -5.41% |
| BHARATFORG | 1078.35 | 1076.95 | 27-Feb-25 | -3.65% |
| LUPIN | 1969.90 | 1968.60 | 27-Feb-25 | -1.85% |
| TORNTPHARM | 3013.85 | 3012.75 | 27-Feb-25 | -1.02% |
| AUROPHARMA | 1131.35 | 1131.05 | 27-Feb-25 | -0.74% |

(Source: [NSE](#))

PUT CALL-RATIO

| Symbol | PUT | CALL | RATIO |
|--------------|----------|----------|-------------|
| NIFTY | 50825325 | 60238125 | 0.84 |

(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. OBEROIRLTY | 2. BRIGADE | 3. DLF | 4. GODREJPROP | 5. SOBHA |
| 6. MAHLIFE | 7. RAYMOND | 8. PRESTIGE | 9. LODHA | 10. PHOENIX |

(Source: [Moneycontrol](#))

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