

## Market Snapshot

KEY INDICES	13-Mar-25	07-Mar-25	%Ch
S&P CNX NIFTY	22397.20	22552.50	-0.69
SENSEX	73828.91	74332.58	-0.68
NIFTY MIDCAP 100	48125.10	49190.60	-2.17
NIFTY SMLCAP 100	14897.35	15504.30	-3.91

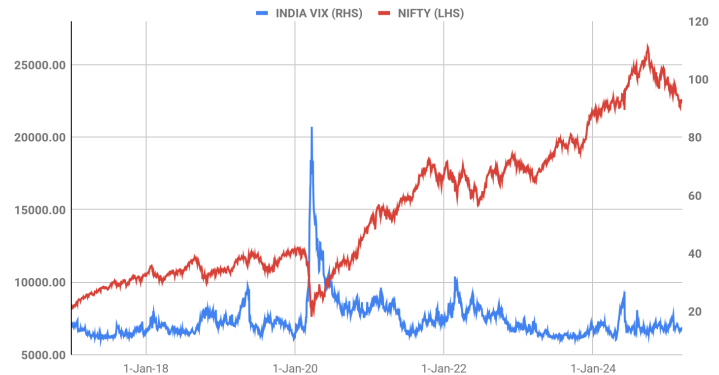
(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	13-Mar-25	07-Mar-25	%Ch
NIFTY BANK	48060.40	48497.50	-0.90
NIFTY AUTO	20554.05	21009.70	-2.17
NIFTY FMCG	51879.25	51891.80	-0.02
NIFTY IT	36122.50	37820.45	-4.49
NIFTY METAL	8777.65	8926.90	-1.67
NIFTY PHARMA	20386.85	20378.30	0.04
NIFTY REALTY	800.15	816.35	-1.98
BSE CG	57756.79	58911.86	-1.96
BSE CD	52894.41	53975.12	-2.00
BSE Oil & GAS	23653.85	23833.79	-0.75
BSE POWER	6149.62	6152.62	-0.05

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

## Nifty Vs. INDIA VIX



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

## Nifty ends below 23,400 level; broader market underperforms

The domestic equity indices ended with moderate declines this week as investor sentiment was negatively impacted by persistent selling from Foreign Institutional Investors (FIIs) in Indian equities. Concerns over U.S. President Donald Trump's trade policies, including his recent decision to impose import taxes on steel and aluminium, contributed to the cautious atmosphere. This move triggered retaliatory tariffs from the European Union (EU) and Canada. Additionally, fears of a potential recession in the United States added to the overall market uncertainty. The broader market underperformed the frontline indices. The market will remain closed tomorrow on account of Holi.

In the week ended on Thursday, 13 March 2025, the S&P BSE Sensex slipped 503.67 points, or 0.68%, to settle at 73,828.91. The Nifty 50 index dropped 155.3 points, or 0.68%, to settle at 22,397.20. The BSE Mid-Cap index fell 2.06% to close at 39,062.82. The BSE Small-Cap index declined 3.86% to end at 43,844.98.

## FII & DII Activities (Rs Crore)

07/03/2025 to 13/03/2025

Activities	FIIs	DIIs
Buy	62561.36	52775.67
Sell	70462.26	44955.84
Net	-7900.90	7819.83

(Source: Capitaline)

## Sensex Gainers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
SUNPHARMA	1683.85	1609.90	<b>4.59</b>
ICICIBANK	1250.25	1214.30	<b>2.96</b>
KOTAKBANK	1984.80	1934.35	<b>2.61</b>
ITC	411.85	403.80	<b>1.99</b>
POWERGRID	267.60	263.20	<b>1.67</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
INDUSINDBK	672.10	936.80	<b>-28.26</b>
WIPRO	263.95	284.75	<b>-7.30</b>
INFY	1579.25	1685.75	<b>-6.32</b>
TECHM	1439.65	1492.70	<b>-3.55</b>
M&M	2643.40	2728.20	<b>-3.11</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
SUNPHARMA	1683.45	1609.30	<b>4.61</b>
ICICIBANK	1250.05	1214.55	<b>2.92</b>
KOTAKBANK	1985.10	1935.40	<b>2.57</b>
ITC	412.05	403.90	<b>2.02</b>
POWERGRID	267.65	263.30	<b>1.65</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
INDUSINDBK	672.35	936.75	<b>-28.23</b>
WIPRO	264.00	284.80	<b>-7.30</b>
INFY	1579.85	1686.00	<b>-6.30</b>
UPL	601.45	629.85	<b>-4.51</b>
TECHM	1440.65	1492.35	<b>-3.46</b>

(Source: Capitaline)

India's retail inflation eased to a seven-month low of 3.61% in February 2025, down from 4.31% in January, as food price pressures softened, according to government data released on Wednesday. This brings inflation below the Reserve Bank of India's (RBI) medium-term target of 4% for the first time since August 2024.

Meanwhile, India's industrial output growth picked up to 5% year-on-year in January 2025, compared to 3.2% in December 2024.

### Global Markets:

The European Union reacted to U.S. President Trump's 25% tariffs on steel and aluminum imports by announcing counter-tariffs on Euro 26 billion (\$28.33 billion) worth of U.S. goods, set to begin in April. The move was aimed at protecting EU consumers and businesses. While the White House confirmed the tariffs would impact Canada, Australia, the EU, and others, it clarified that Trump no longer intended to raise tariffs on Canadian metals to 50%.

German exports dropped 2.5% month-on-month in January, adding to concerns over slowing global trade.

China's consumer inflation dipped into negative territory for the first time in 13 months, driven by seasonal distortions and broader economic headwinds. The consumer price index (CPI) fell 0.7% year-over-year in February, reversing a 0.5% gain in January, according to the National Bureau of Statistics.

In Japan, fresh government data showed the economy grew at an annualized rate of 2.2% in Q4, down from an earlier estimate of 2.8%. However, the reading remained well above the previous quarter's 1.2% expansion. Quarter-on-quarter, GDP growth was revised slightly lower to 0.6% from 0.7%, still ahead of the prior 0.3% pace.

Japan's annual wholesale inflation hit 4% in February, slowing from the seven-month high of 4.2% the month before. The latest reading is still well above the country's 2%

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
TATACOMM	1503.95	1383.85	<b>8.68</b>
TUBEINVEST	2926.55	2701.80	<b>8.32</b>
JSWENERGY	514.10	491.70	<b>4.56</b>
FLUOROCHEM	3840.05	3730.60	<b>2.93</b>
COROMANDEL	1797.70	1756.30	<b>2.36</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	13-Mar-25	07-Mar-25	%Ch
DEVYANI	152.39	168.88	<b>-9.76</b>
LTTS	4378.20	4822.00	<b>-9.20</b>
RAMCOCEM	801.55	871.65	<b>-8.04</b>
IDEA	6.95	7.55	<b>-7.95</b>
AUBANK	502.85	544.30	<b>-7.62</b>

(Source: Capitaline)

## World Markets

KEY INDICES	14-Mar-25	07-Mar-25	%Ch
DJIA	41488.19	42801.72	<b>-3.07</b>
NASDAQ	17754.09	18196.22	<b>-2.43</b>
BOVESPA	128957.09	125034.63	<b>3.14</b>
FTSE 100	8632.33	8679.88	<b>-0.55</b>
CAC 40	8028.28	8120.80	<b>-1.14</b>
DAX	22986.82	23008.94	<b>-0.10</b>
MOEX RUSSIA	3195.08	3166.88	<b>0.89</b>
NIKKEI 225	36790.03	36887.17	<b>-0.26</b>
HANG SENG	23462.65	24231.30	<b>-3.17</b>
STRAITS TIMES	3837.52	3914.48	<b>-1.97</b>
SHANGHAI COMPOSITE	3358.73	3372.55	<b>-0.41</b>
JAKARTA	6647.42	6636.00	<b>0.17</b>

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

inflation target and raises bets that the Bank of Japan will hike interest rates.

The U.S. economy added 151,000 jobs in February, falling short of expectations, while the unemployment rate ticked up to 4.1% from January's 4.0%, signaling possible cracks in labor market resilience.

The U.S. consumer price index (CPI) rose 2.8% year-over-year in February, down from January's 3% increase. The core CPI, which excludes volatile food and energy prices, recorded a 3.1% uptick-its slowest pace since 2021.

(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 22330, 22263, 22149, 22082 while levels of 22511, 22625, 22692, 22752 may act as resistance with pivot point at 22444.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	27-Mar-25	22437.00	22639.00	<b>-0.89%</b>	<b>39.80</b>	702597	722181	<b>-2.71%</b>
<b>BANKNIFTY</b>	27-Mar-25	48101.00	48625.00	<b>-1.08%</b>	<b>40.60</b>	201104	189540	<b>6.10%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>MANAPPURAM</b>	208.14	209.02	27-Mar-25	<b>11.02%</b>
<b>GODREJCP</b>	1025.80	1029.75	27-Mar-25	<b>10.04%</b>
<b>BALKRISIND</b>	2499.05	2506.70	27-Mar-25	<b>7.98%</b>
<b>LICHSGFIN</b>	515.60	517.15	27-Mar-25	<b>7.84%</b>
<b>MRF</b>	105041.60	105352.85	27-Mar-25	<b>7.73%</b>
<b>HEROMOTOCO</b>	3529.15	3539.10	27-Mar-25	<b>7.35%</b>
<b>ADANIPORTS</b>	1119.20	1122.30	27-Mar-25	<b>7.22%</b>
<b>PEL</b>	885.95	888.35	27-Mar-25	<b>7.06%</b>
<b>ESCORTS</b>	2908.50	2916.30	27-Mar-25	<b>6.99%</b>
<b>IDFCFIRSTB</b>	53.48	53.62	27-Mar-25	<b>6.82%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>PAGEIND</b>	40099.25	39567.50	27-Mar-25	<b>-34.57%</b>
<b>SRF</b>	2951.80	2929.50	27-Mar-25	<b>-19.70%</b>
<b>PFC</b>	388.35	385.65	27-Mar-25	<b>-18.13%</b>
<b>NATIONALUM</b>	187.87	186.76	27-Mar-25	<b>-15.40%</b>
<b>IGL</b>	184.88	183.83	27-Mar-25	<b>-14.81%</b>
<b>RECLTD</b>	406.65	404.70	27-Mar-25	<b>-12.50%</b>
<b>CHOLAFIN</b>	1444.70	1438.85	27-Mar-25	<b>-10.56%</b>
<b>BPCL</b>	264.41	263.44	27-Mar-25	<b>-9.56%</b>
<b>VOLTAS</b>	1402.55	1398.50	27-Mar-25	<b>-7.53%</b>
<b>SHREECEM</b>	27495.15	27447.45	27-Mar-25	<b>-4.52%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	64705850	67880350	<b>0.95</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. SUNPHARMA</b>	<b>2. LTTS</b>	<b>3. WIPRO</b>	<b>4. INFY</b>	<b>5. LTIM</b>
<b>6. COFORGE</b>	<b>7. MPHASIS</b>	<b>8. TECHM</b>	<b>9. PERSISTENT</b>	<b>10. TCS</b>

(Source: [Moneycontrol](#))

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