

Market Snapshot

KEY INDICES	21-Feb-25	14-Feb-25	%Ch
S&P CNX NIFTY	22795.90	22929.25	-0.58
SENSEX	75311.06	75939.21	-0.83
NIFTY MIDCAP 100	50486.20	49654.15	1.68
NIFTY SMLCAP 100	15636.90	15407.20	1.49

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

Sectoral Snapshot

KEY INDICES	21-Feb-25	14-Feb-25	%Ch
NIFTY BANK	48981.20	49099.45	-0.24
NIFTY AUTO	21505.90	22069.30	-2.55
NIFTY FMCG	52098.15	53138.55	-1.96
NIFTY IT	40544.50	41311.15	-1.86
NIFTY METAL	8609.70	8187.50	5.16
NIFTY PHARMA	20385.65	20811.55	-2.05
NIFTY REALTY	844.50	831.45	1.57
BSE CG	58398.81	57349.10	1.83
BSE CD	54537.62	54686.28	-0.27
BSE Oil & GAS	23900.69	23352.42	2.35
BSE POWER	6091.32	5826.15	4.55

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

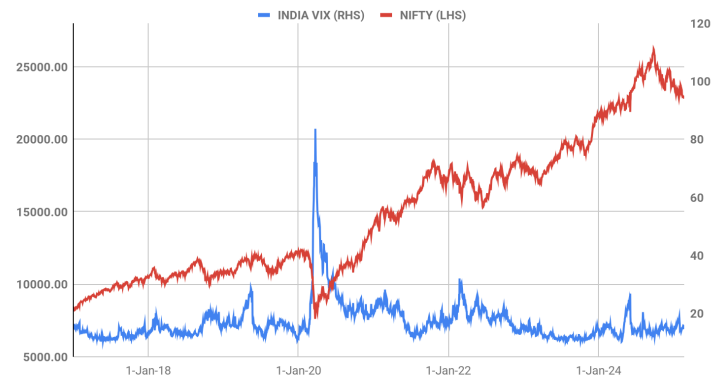
FII & DII Activities (Rs Crore)

14/02/2025 to 21/02/2025

Activities	FIIs	DIIs
Buy	74162.39	75386.41
Sell	78795.47	54440.59
Net	-4633.08	20945.82

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Benchmarks decline for 3rd week; Nifty settles tad below 22,800 level

The key equity benchmarks witnessed major losses during the week, extending their losing streak for third consecutive week. Investors remained cautious due to global headwinds, including potential U.S. tariffs, persistent U.S. inflation, and the Federal Reserve's cautious stance on rate cuts. The indices were lower for four out of five trading sessions. The boarder market outperformed the frontline indices. The Sensex slipped by over 600 pts and Nifty closed tad below 22,800 level.

In the week ended on Friday, 21 February 2025, the S&P BSE Sensex dropped 628.15 points or 0.83% to settle at 75,311.06. The Nifty 50 index declined 133.35 points or 0.58% to settle at 22,795.90. The BSE Mid-Cap index advanced 1.62% to close at 40,374.02. The BSE Small-Cap index rose 0.98% to end at 45,856.

Sensex Gainers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
NTPC	325.95	300.25	8.56
TATASTEEL	140.60	134.40	4.61
LT	3314.60	3238.10	2.36
BAJAJFINSV	1878.45	1840.45	2.06
INDUSINDBK	1043.15	1024.25	1.85

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
M&M	2667.80	2940.75	-9.28
BHARTIARTL	1638.40	1717.15	-4.59
TCS	3785.75	3932.75	-3.74
SUNPHARMA	1643.05	1704.65	-3.61
HINDUNILVR	2241.60	2318.05	-3.30

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
NTPC	326.25	300.35	8.62
HINDALCO	653.55	606.20	7.81
EICHERMOT	4962.45	4703.35	5.51
TATASTEEL	140.76	134.47	4.68
UPL	646.35	618.35	4.53

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
M&M	2669.35	2942.60	-9.29
BHARTIARTL	1639.25	1717.05	-4.53
DRREDDY	1151.80	1197.05	-3.78
TCS	3786.00	3934.85	-3.78
SUNPHARMA	1643.75	1700.50	-3.34

(Source: Capitaline)

Politics:

Rekha Gupta was sworn in as the new chief minister of Delhi today. She will be Delhi's fourth woman CM after Sushma Swaraj, Sheila Dikshit, and Atishi. Gupta's selection as CM came 10 days after the BJP's landslide win in the Delhi Assembly elections, where the party secured 48 out of 70 seats, ending AAP's decade-long rule. The BJP has yet to announce its ministerial lineup.

Economy:

The unemployment rate in India for people aged 15 years and above in urban areas dropped to 6.4% in the October-December quarter of 2024, according to the National Sample Survey Survey (NSSO). This was unchanged on a quarterly basis.

India's HSBC Flash India Composite Output Index rose to 60.6 in February, up from 57.7 in January. The manufacturing PMI slipped to 57.1 in February from 57.7 in January.

Global Markets:

The People's Bank of China held the 1-year loan prime rate unchanged at 3.1%, and the 5-year LPR at 3.6%.

The U.K.'s inflation rate rose to 3% in January. Core inflation hit 3.7%, up from 3.2% in the previous month and the highest rate since April 2024.

The Reserve Bank of Australia (RBA) cut rates by 25 basis points to 4.1%.

In Japan, gross domestic product (GDP) data grew 2.8% year-on-year, accelerating sharply from the 1.7% seen in the prior quarter.

Japan reported a larger-than-expected trade deficit of 2.76 trillion yen (\$1.8 billion) for the latest period.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
JSWENERGY	496.60	437.10	13.61
DEVYANI	176.53	158.29	11.52
NMDC	67.73	61.93	9.37
NHPC	79.89	73.29	9.01
SHRIRAMFIN	585.10	539.15	8.52

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	21-Feb-25	14-Feb-25	%Ch
BIOCON	322.50	349.35	-7.69
OFSS	8405.00	8962.95	-6.23
LAURUSLABS	521.45	546.20	-4.53
COFORGE	7496.20	7793.35	-3.81
TATACOMM	1450.15	1503.20	-3.53

(Source: Capitaline)

World Markets

KEY INDICES	21-Feb-25	14-Feb-25	%Ch
DJIA	43428.02	44546.08	-2.51
NASDAQ	19524.01	20026.77	-2.51
BOVESPA	127128.06	128218.59	-0.85
FTSE 100	8659.37	8732.46	-0.84
CAC 40	8154.51	8178.54	-0.29
DAX	22287.56	22513.42	-1.00
MOEX RUSSIA	3283.29	3185.00	3.09
NIKKEI 225	38776.94	39149.43	-0.95
HANG SENG	23477.92	22620.33	3.79
STRAITS TIMES	3929.94	3877.50	1.35
SHANGHAI COMPOSITE	3379.11	3346.72	0.97
JAKARTA	6803.00	6638.46	2.48

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

U.S. retail sales fell by 0.9% last month after an upwardly revised increase of 0.7% in December. Year-on-year, retail sales advanced by 4.2%.

The minutes from the Fed's January meeting showed policymakers remained hesitant about lowering interest rates amid persistent inflation and economic uncertainty. Officials also discussed the possibility of pausing or slowing the balance-sheet runoff—known as quantitative tightening (QT)—until the ongoing debt-ceiling issue is resolved.

Fresh U.S. economic data released on Wednesday showed a slowdown in housing starts for January, as both single-family and multifamily home construction pulled back. Housing starts slumped 9.8% month-over-month to an annualized 1.366 million, down from December's 10-month high of 1.515 million.

(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 22703, 22611, 22502, 22422 while levels of 22904, 23013, 23105, 23198 may act as resistance with pivot point at 22812.

(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	22799.60	22972.30	-0.75%	3.70	603300	670440	-10.01%
BANKNIFTY	27-Feb-25	48980.00	49288.00	-0.62%	-1.20	194604	175354	10.98%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
MANAPPURAM	201.32	202.44	27-Feb-25	33.84%
TATACONSUM	1004.00	1007.35	27-Feb-25	20.30%
IDFCFIRSTB	60.63	60.83	27-Feb-25	20.07%
APOLLOTYRE	408.65	409.90	27-Feb-25	18.61%
MFSL	1052.20	1055.30	27-Feb-25	17.92%
BATAINDIA	1298.10	1301.80	27-Feb-25	17.34%
JUBLFOOD	692.35	694.30	27-Feb-25	17.13%
BRITANNIA	4831.90	4845.40	27-Feb-25	17.00%
BPCL	251.30	251.95	27-Feb-25	15.73%
RBLBANK	162.58	163.00	27-Feb-25	15.72%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
NATIONALUM	201.01	200.09	27-Feb-25	-27.84%
VOLTAS	1269.00	1265.05	27-Feb-25	-18.94%
CONCOR	687.60	685.50	27-Feb-25	-18.58%
ASHOKLEY	222.53	221.96	27-Feb-25	-15.58%
SHREECEM	28405.70	28349.55	27-Feb-25	-12.03%
EICHERMOT	4962.45	4954.15	27-Feb-25	-10.17%
AMBUJACEM	481.95	481.15	27-Feb-25	-10.10%
INDUSINDBK	1043.75	1042.05	27-Feb-25	-9.91%
VEDL	438.20	437.50	27-Feb-25	-9.72%
LICHSGFIN	544.05	543.20	27-Feb-25	-9.50%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	120376500	164021025	0.73

(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. APLAPOLLO	2. NATIONALUM	3. NMDC	4. HINDALCO	5. JSL
6. SAIL	7. VEDL	8. JINDALSTEL	9. WELCORP	10. TATASTEEL
11. M&M	12. TVSMOTOR	13. MARUTI	14. BHARATFORG	

(Source: [Moneycontrol](#))

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