

Weekly Market insights & Strategies



11 August 2025

Weekly Market Recap: India & Global

Dalal Street opened the week on a positive note, rebounding from the previous week’s weakness. Market movement was influenced by multiple factors, including the Reserve Bank of India’s monetary policy meeting, developments in the India-US trade deal, Q1 earnings, IPO activity, foreign fund flows, and trends in gold and crude oil prices. Meanwhile, U.S. indices began the week on a strong footing, supported by solid performance in leading stocks. Asian markets, however, opened on a mixed note, reflecting cautious investor sentiment. Indian markets closed lower on Wednesday after the RBI kept the repo rate unchanged and maintained a 'Neutral' policy stance, triggering cautious sentiment and profit-booking. Asian markets were mixed on Thursday following Trump’s pledge to impose a 100% tariff on semiconductor and chip imports. Swiggy, Vishal Mega Mart, Waaree Energies India, and Hitachi Energy India have been added to the MSCI India Index, a component of the MSCI Global Standard Index, while Sona BLW Precision Forgings and Thermax have been removed. On August 8, bears dragged the Nifty below 24,400 for the first time since May 7, 2025, amid broad-based selling and renewed US tariff concerns. The Sensex fell 765.47 points to 79,857.79, and the Nifty slipped 232.85 points to 24,363.30. For the week, both the Sensex and Nifty declined nearly 1%. Major Wall Street indices were mixed during the week due to earning results and ongoing tariff announcement from the US president, The Dow Jones Industrial Average fell to 43,724 and the S&P 500 declined to 6,271. The Nasdaq Composite gained as it witnessed some positive movement towards the end of the week rising to 21,400. European stocks closed Thursday at a one-week high on strong financial stocks and hopes of a Ukraine ceasefire. Asian markets traded mixed on Friday, with Japan's Topix hitting all-time high. Japan’s Nikkei 225 rallied 1.93%, while the Topix index gained 1.42%. South Korea’s Kospi index fell 0.25% and the Kosdaq rose 0.65%. Hong Kong’s Hang Seng index futures to saw weakness.

Indian Equity Market Performance & Key Valuation Ratio

Index	08-08-2025	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	24363.30	-0.83%	21.48	3.32	1.37
BSE Sensex	79,857.79	-0.93%	22.35	4.25	1.19
BSE Midcap	44570.89	-1.31%	32.81	4.61	0.8
BSE Smallcap	51596.97	-1.90%	29.7	3.7	0.67
BSE 250 LargeMidCap	10473.44	-0.94%	23.22	4.12	1.2
Sectoral Indices					
BSE Fmcg	20200.25	-2.26%	38.69	8.65	1.83
BSE Commodity	7645.74	-0.54%	26.8	3.1	1.14
BSE CD	9347.11	-0.67%	40.76	6.91	0.68
BSE Energy	11141.35	-0.80%	12.22	1.85	3.21
BSE Financial Services	12341.92	-0.90%	17.46	2.87	0.92
BSE Healthcare	43160.95	-2.56%	38.99	6.44	0.57
BSE IT	33816.41	-1.07%	25.06	7.1	2.43
BSE Auto	52473.08	0.22%	25.08	6.09	1.17
BSE Bankex	61127.28	-1.11%	14.52	2.63	0.86
BSE Metal	30461	0.57%	18.4	2.61	2.13
BSE Oil & Gas	26029.19	-0.98%	11.67	1.57	3.23
BSE Power	6573.23	-1.44%	26.78	3.8	1.29
BSE Realty	6791.68	-2.42%	47.56	5.59	0.3

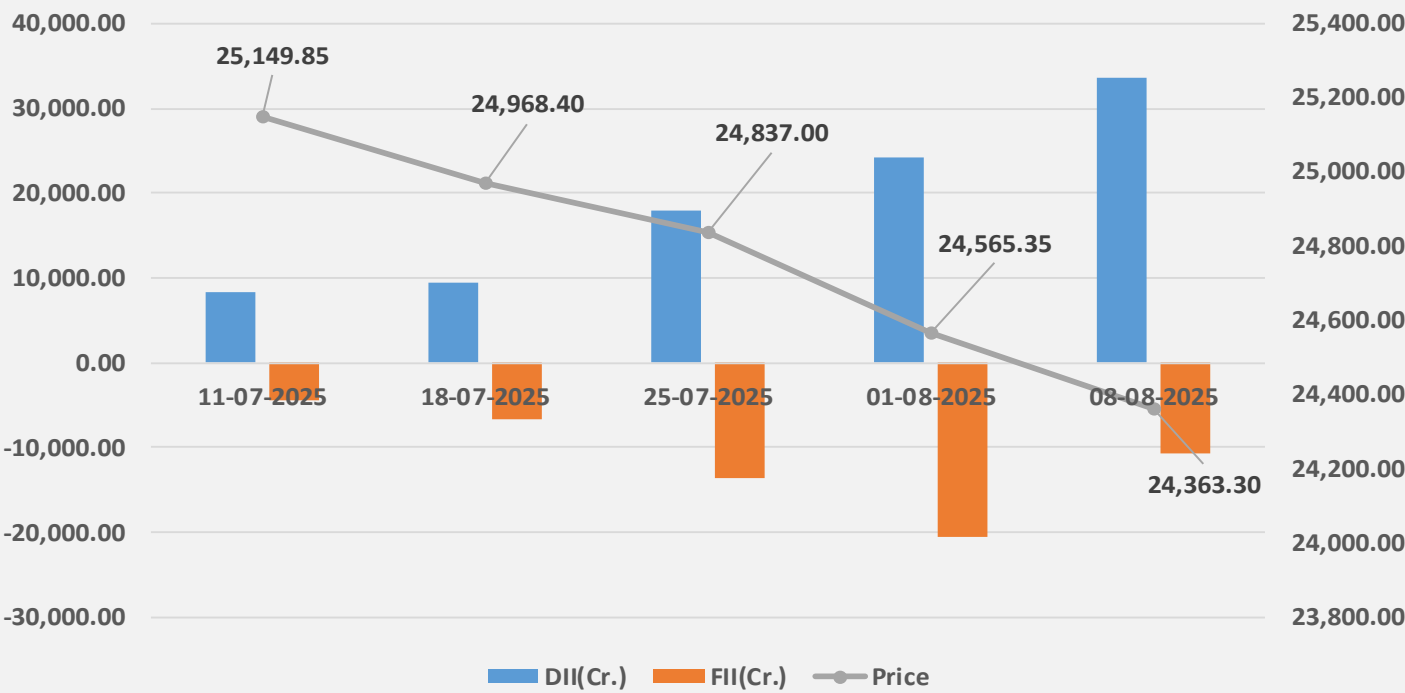
Top Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Trent Ltd.	5317	5.96	-3.31
Titan Company Ltd.	3460.2	3.37	-5.62
Asian Paints Ltd.	2475.6	3.32	1.34
Tech Mahindra Ltd.	1480.4	1.14	-8.84
State Bank of India	804.3	0.97	-0.32

Top Losers

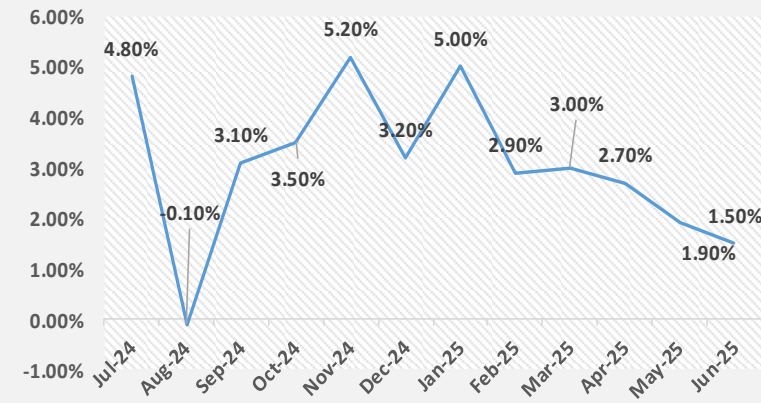
Symbol	LTP	%Change (WoW)	%Change (MoM)
Sun Pharmaceutical Industries Ltd.	1586.9	-7.02	-5.54
Infosys Ltd.	1423.1	-5.69	-12.53
Tata Motors Ltd.	633.7	-4.84	-8.01
Adani Ports & Special Economic Zone Ltd.	1325	-3.50	-7.70
ICICI Bank Ltd.	1435.9	-3.07	0.01

FII & DII Investment Flow Vs NIFTY50

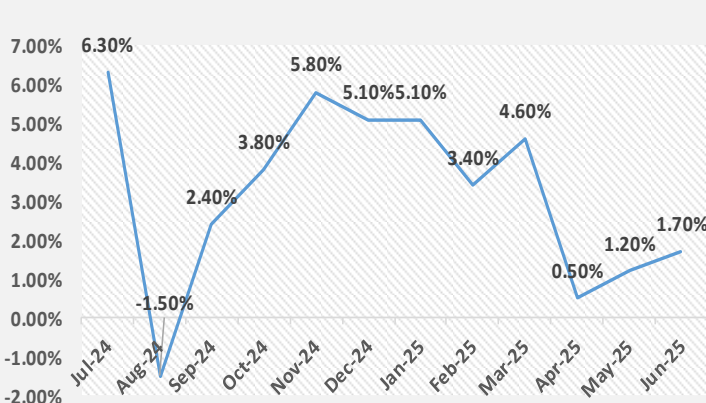


Macro-Economic Performance: India

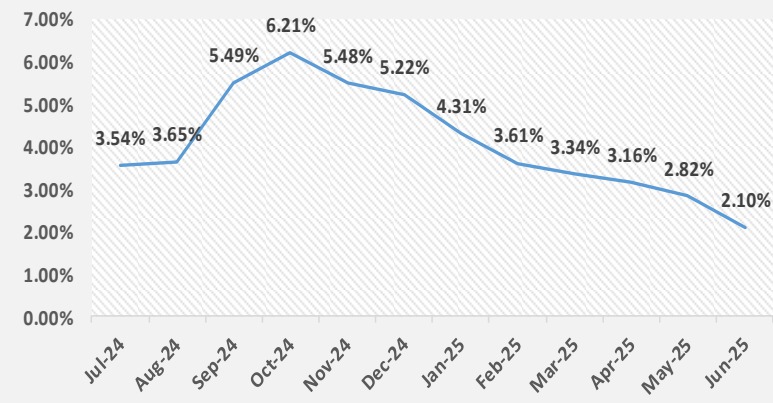
IIP (YoY)



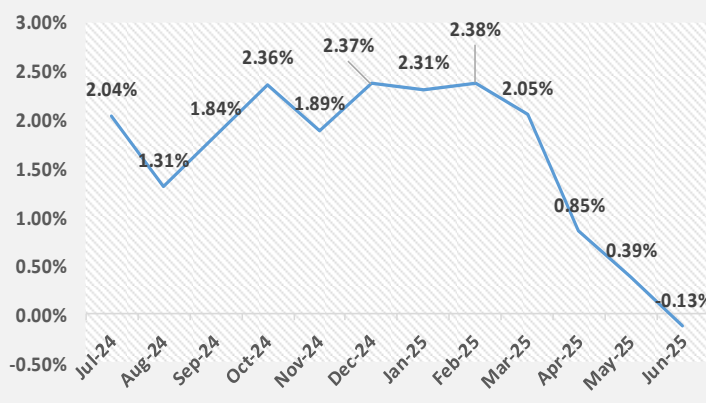
Infrastrucutre Output (YoY)



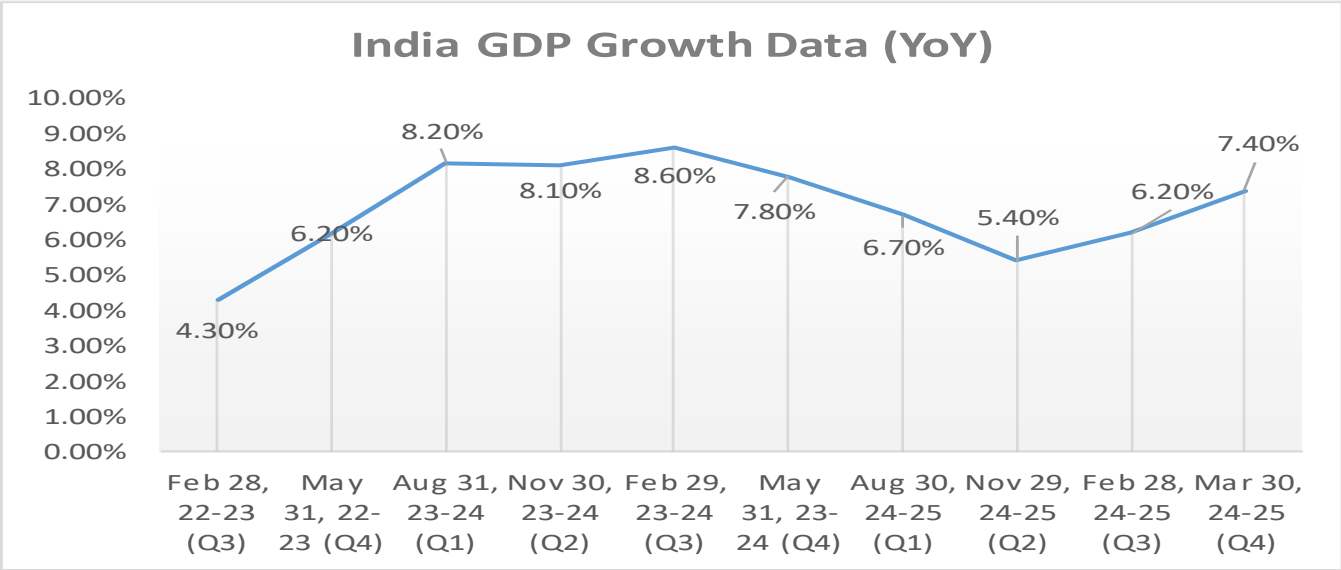
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



NIFTY (24,363.30): Last week the US President Donald Trump imposed an additional 25% tariff on Indian imports, citing India’s continued oil trade with Russia, raising total US tariffs on India to 50%. On August 07th Prime Minister Narendra Modi stated he won't compromise on farmers' interests and is ready to pay heavy price. RBI Governor Sanjay Malhotra announced on August 6 that the repo rate will remain unchanged at 5.5%, with the FY26 GDP growth forecast retained at 6.5%. Meanwhile, Japan's services sector showed strong growth, with the S&P Global final Services PMI rising to 53.6 in July from 51.7 in June the highest level since February. US initial jobless claims for the week ended August 2 increased by 7,000 to a seasonally adjusted 226,000, marking the highest level since the week ended July 5.

Last week, major indices extended their decline as markets reacted to ongoing US tariff announcements, leading to broad-based weakness. The short-term trend remains bearish, with the Nifty slipping below its 100-day EMA, signalling potential downside risk. While the Bank Nifty has so far managed to hold above its 100-day EMA, overall sentiment remains cautious, and participants are advised to closely monitor the long-term trend. The Nifty index needs to move above 24,500 level. A decisive move above this level could unlock further upside potential towards 24,700 and 24,880 in the near term. If bullish momentum continues, the rally may extend up to 25,000. On the downside, initial support is expected around 24,300, followed by 24,270 and 24,100, with a stronger support base near 23,940 acting as a buffer against deeper corrections. From a sectoral perspective, Bank Nifty is trading in a consolidative range. A sustained move above 55,490/55,600 could confirm a breakout and potentially drive the index higher towards 55,868, with an extended target of 56,270. However, a drop below 54,900/54,800 may invite fresh selling pressure, with critical support levels located at 54,636 and 54,300.

This week, market participants will closely track a series of high-impact macroeconomic data releases across major economies that are expected to drive market sentiment. In India, attention will be on the CPI inflation print scheduled for August 12, followed by the WPI inflation data on August 14. Additionally, data on passenger vehicle sales, foreign exchange reserves, and bank loan and deposit growth will provide insights into domestic demand, external sector stability, and liquidity trends. In the United States, inflation data on August 12 will be closely watched, as it may influence the Fed's rate trajectory. Alongside this, key updates such as initial jobless claims, EIA’s weekly crude oil and gasoline inventory reports, industrial and manufacturing production figures, and retail sales data will offer a comprehensive picture of the U.S. economy's health. In the UK, unemployment data, Q2 GDP figures, industrial output, and retail sales will be important in gauging the country's economic resilience. China is expected to release vehicle sales data, along with industrial and manufacturing production numbers, offering a pulse on consumer demand and factory activity. Japan’s GDP print for Q2 will also be on the radar, as investors look for signs of growth momentum.

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