

# Weekly Market insights & Strategies



14 July 2025

Weekly Market Recap: India & Global

Indian stock markets witnessed heightened volatility at the start of the week, opening on a weak note amid uncertainty surrounding the potential India–US trade deal. Investor sentiment remained cautious, leading the benchmark indices to close flat as market participants grappled with the lack of clarity. Meanwhile, US equities ended sharply lower on Monday following President Trump’s announcement of significant tariffs on key trading partners. In contrast, Asian markets edged higher as President Trump signalled the possibility of further negotiations despite the newly imposed tariff measures on nations including Japan and South Korea. Benchmark equity indices extended their losing streak for the third straight session on July 11, weighed down by worries over the potential impact of Trump-era tariffs and heavy selling in IT stocks following TCS’s Q1 FY26 earnings. The Nifty 50 slipped below the crucial 25,200 mark. At the close, the Sensex plunged 689.81 points to settle at 82,500.47, while the Nifty 50 declined 205.40 points to finish at 25,149.85. On a weekly basis, both indices ended lower for the second week in a row, losing over 1% each. U.S. stock markets advanced during the week, with major indices scaling new record highs. The Dow Jones Industrial Average climbed to 44,800, the S&P 500 rose to 6,280, and the Nasdaq Composite reached 20,630. The upbeat sentiment on Wall Street carried over to Asian markets, which traded mostly higher in response to the overnight gains. The Hang Seng Index in Hong Kong surged 1.6% to 24,402.41. Japan’s Nikkei 225 remained flat, while the broader Topix index edged up 0.41%. South Korea’s Kospi added 0.19%, and the small-cap Kosdaq advanced 0.5%.

Indian Equity Market Performance & Key Valuation Ratio

Index	11-07-2025	% Change (WOW)	P/E	P/B	Dividend Yield
Broader Indices					
Nifty	25149.85	-1.24%	22.64	3.58	1.3
BSE Sensex	82,500.47	-1.13%	23.62	4.39	1.17
BSE Midcap	46291.2	-1.13%	35.7	4.79	0.74
BSE Smallcap	54484.76	-0.63%	32.01	3.9	0.6
BSE 250 LargeMidCap	10834.69	-1.21%	24.49	4.27	1.15
Sectoral Indices					
BSE Fmcg	20571.44	1.92%	40.01	8.8	1.77
BSE Commodity	7832.39	-1.64%	29.13	3.18	1.11
BSE CD	9479.02	-1.41%	42.21	7.01	0.62
BSE Energy	11873.19	-2.03%	13.51	1.97	2.95
BSE Financial Services	12738.41	-0.33%	18.07	2.96	0.89
BSE Healthcare	44329.97	-1.28%	39.95	6.61	0.63
BSE IT	37028.43	-3.48%	27.99	7.77	2.23
BSE Auto	52561.78	-2.01%	25.55	6.1	1.06
BSE Bankex	63599.03	-0.10%	14.99	2.72	0.83
BSE Metal	31217.97	-2.04%	19.62	2.67	2.05
BSE Oil & Gas	27802.96	-1.99%	13.12	1.68	3.13
BSE Power	6890.22	0.62%	27.29	3.99	1.42
BSE Realty	7482.1	-0.78%	52.89	6.16	0.26

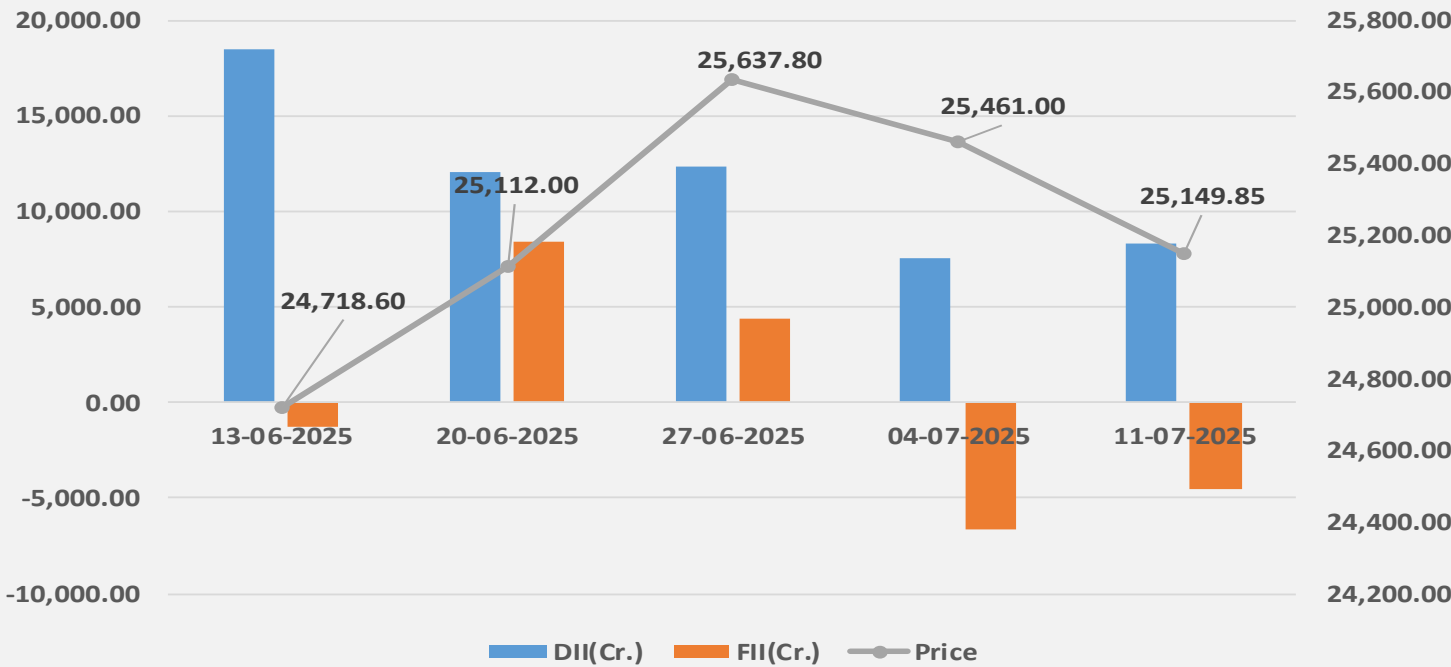
Top Gainers

Symbol	LTP	%Change (WoW)	%Change (MoM)
Hindustan Unilever Ltd.	2519.6	8.91	5.19
Kotak Mahindra Bank Ltd.	2220.6	4.42	3.23
Bajaj Finance Ltd.	933.5	2.57	-1.71
NTPC Ltd.	342.7	2.42	1.03
Bajaj Finserv Ltd.	2017.2	1.84	0.96

Top Losers

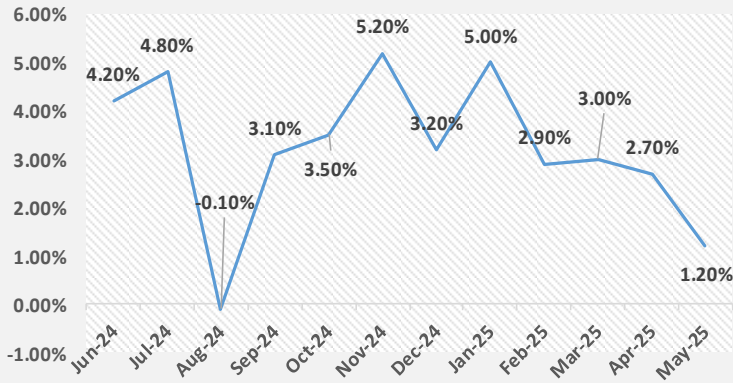
Symbol	LTP	%Change (WoW)	%Change (MoM)
Trent Ltd.	5364	-13.36	-7.74
Titan Company Ltd.	3361.6	-8.62	-4.61
Bharti Airtel Ltd.	1921.9	-4.82	3.49
HCL Technologies Ltd.	1638.3	-4.30	-1.79
Tech Mahindra Ltd.	1602.5	-4.15	-0.52

FII & DII Investment Flow Vs NIFTY50

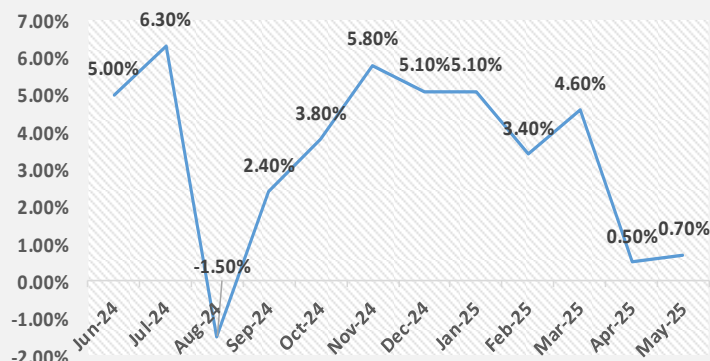


Macro-Economic Performance: India

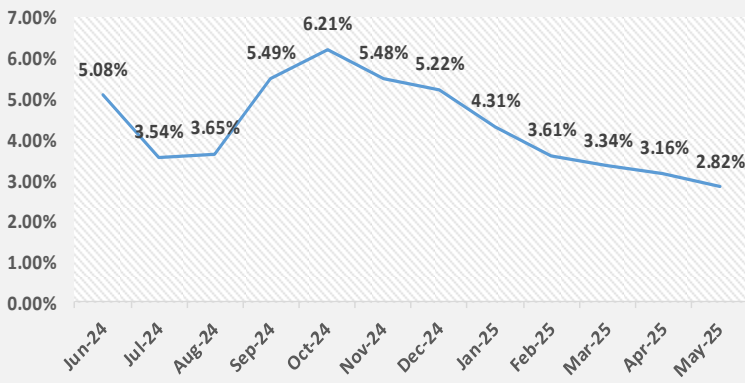
IIP (YoY)



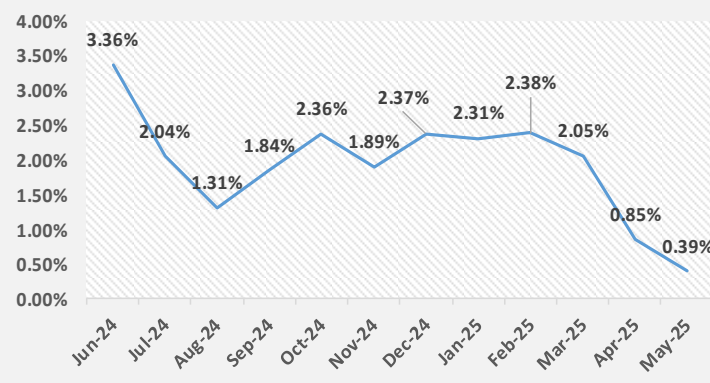
Infrastrucutre Output (YoY)



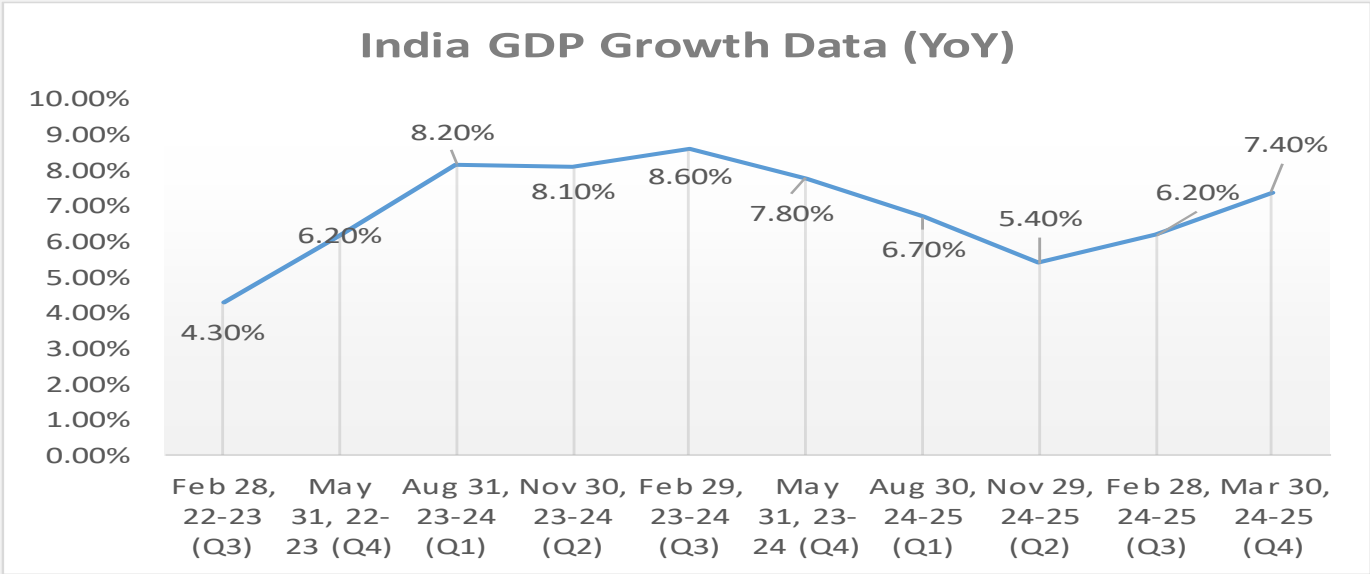
CPI (YoY)



WPI (YoY)



Market View from Research Desk:



**NIFTY (25,149.85):** US President Donald Trump announced fresh tariffs ranging from 25% to 40% on imports from several countries, including Japan and South Korea, effective August 1, following a delay from the earlier July 9 implementation. In addition, he unveiled a steep 50% tariff on copper imports and signalled that pharmaceutical products could soon face tariffs as high as 200%, though those would come into effect only after at least a year. The announcement triggered a sharp reaction in the commodities market, with copper contracts on Comex surging as much as 17% on Tuesday marking a record one-day spike before pulling back over 4% in early Wednesday trading. In New York, copper traded at \$5.5085 per pound, while prices on the London Metal Exchange dropped 1.7% to \$9,627 per ton. Minutes from the June 17–18 Fed meeting showed most policymakers favoured a cautious, wait-and-see stance on future rate decisions. U.S. President Donald Trump on Wednesday warned of a 50% tariff on Brazil starting August 1, in a letter to Brazilian President Luiz Inácio Lula da Silva.

Last week The major indices were cautious tracking US India trade deal the entire week saw a consolidative movement with lack of clear direction. Long term trend remains intact with market positioned for further upside as they trade above their long term moving averages of 100 and 200 days, Short term trend has also turned positive. The Nifty index is currently testing immediate resistance near the 25,222 level. A decisive breakout above this zone could open the path for further upside towards 25,300/25500 in the near term. Should bullish momentum persist, the rally may extend further to 25,700. On the downside, the index is expected to find initial support around 25,065/25,000 and 24,974, with stronger cushion placed at 24,900, offering a safety net against deeper corrections. From a sectoral standpoint, Technically, Bank Nifty needs to surpass the 56,896 mark to initiate a breakout. A sustained move above 56,980 could pave the way for a rally towards 57200, with an extended target near 57,315. On the flip side, a decline below 56,624/56,457 may trigger fresh selling pressure, with key support levels seen at 56,200/55,857.

This week, a series of key macroeconomic data releases from major global economies will shape market sentiment. Inflation and core inflation figures are expected from India, Japan, the United States, and the United Kingdom. Additionally, unemployment data will be released by the UK and China. In India, passenger vehicle sales data is scheduled for release, while industrial production figures will be reported by Japan, China, and the US. Retail sales numbers from the US and China will also be closely watched for insights into consumer demand. Several countries are expected to announce their balance of trade figures. As is customary, the US will release its weekly initial jobless claims, as well as data on gasoline and crude oil inventory changes. In India, the latest figures on bank loan and deposit growth will also be released.



Technical Pick for the Week:

Nuvoco Vistas Corporation Limited (360.45)



**NUVOCO (Nuvoco Vistas Corporation Limited)**, NUVOCO, a small-cap company from the Construction Materials sector, has been in a consolidation phase over the past three years, trading within a broad range of ₹296–₹400. Throughout this period, volumes have remained steady with limited price movement. However, the stock now appears to be on the verge of a breakout in the near term. A sustained move above the ₹375 mark could trigger fresh buying interest, signalling renewed optimism and a potential trend reversal. On the weekly chart, a higher-high and higher-low formation is visible, suggesting a developing bullish structure. Furthermore, the daily chart indicates a breakout from an inverted head and shoulders pattern, post which the stock has begun to move higher, reinforcing the positive outlook. This technical setup points toward the likelihood of a short-term uptrend.

From an indicator perspective, the momentum oscillator MACD on the weekly chart is showing a positive crossover with the histogram turning green, which supports the bullish momentum. The Stochastic oscillator also remains in the positive zone, indicating sustained buying interest, especially at lower levels. Additional confirmation comes from the OBV and RSI indicators, with the RSI trending upwards towards the 60 level reflecting strengthening momentum. Moreover, the stock has managed to move above its 20-day, 50-day, and 100-day exponential moving averages (EMAs) in the past couple of weeks, which serves as a positive trigger for short-term investors.

In terms of key levels, the stock faces resistance at ₹372 and ₹393, and a breakout beyond these could propel the stock toward the short-term target of ₹415 level an estimated upside of around 15% over a 3–6-month horizon. On the downside, supports are placed at ₹357 and ₹340/333, which can be considered as stop-loss levels to manage risk in case of broader market weakness. Compared to the Nifty index, NUVOCO is exhibiting greater resilience and more consistent price action, making it a technically strong candidate for short-term investment consideration.

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