

# Weekly Market insights & Strategies



08 December

## Weekly Market Recap: India & Global

Week started with Nifty50 opening firm but closed flat near 26,200 and Sensex around 85,640, while Bank Nifty briefly crossed 60,000 for the first time before slipping back, reflecting cautious sentiment despite strong 8.2% Q2 GDP growth. Metals outperformed on supportive global cues and OPEC+ moves, whereas realty, NBFCs and consumption stocks lagged amid macro worries and pre-RBI caution. On Tuesday, markets extended their decline as Nifty, Sensex and Bank Nifty fell for a second day, hurt by FII selling, stretched valuations and a weakening rupee near 89.92. Heavyweights like HDFC Bank, ICICI Bank, Axis Bank, Reliance and L&T dropped over 1%, driving broader weakness. IT and paint stocks like Infosys and Asian Paints outperformed due to defensive buying and soft input costs. The new SEBI Informal Guidance Scheme 2025 and firm gold and silver prices also shaped sentiment. Wednesday displayed weakness ahead of the RBI MPC outcome. Market closed with the rupee hitting a fresh intraday low of 90.14. IT was the bright spot with gains in Wipro, TCS and Infosys, while FMCG, PSU banks and autos saw profit-taking. Max Healthcare, Tata Consumer, Adani Enterprises and BEL were among top losers. Crude eased on Russia-Ukraine peace-talk progress.

MCX gold and silver hit fresh highs due to safe-haven demand and rupee depreciation. On Thursday, Markets posted mild gains after a four-day losing streak, though the rupee's persistent weakness remained a major overhang. IT and select financials led the up-move. IndiGo's parent InterGlobe Aviation fell on widespread operational disruptions. Crude strengthened on lower US inventory expectations and geopolitical tensions, while gold and silver cooled on profit-booking. Week ended with RBI surprising markets with a 25 bps rate cut to 5.25%, triggering a strong risk-on rally, smallcaps such as Kayne's Technology fell on governance concerns. Week saw sector rotation, FII selling and rupee depreciation. Globally, Dow Jones was up 0.50%, S&P 500 up +0.31% and Nasdaq was up +0.91%. In Asia, Japan's Nikkei 225 was up by 0.37%, Hang Seng saw a ramp up by +0.87% and South Korea's KOSPI was up by solid 4.42%.

### Indian Equity Market Performance & Key Valuation Ratio

Index	05-12-2025	% Change (WOW)	P/E	P/B	Dividend Yield
<b>Broader Indices</b>					
Nifty	26186.45	-0.06%	22.8	3.56	1.28
BSE Sensex	85712.37	0.01%	23.38	4.54	1.14
BSE Midcap	46617.8	-1.27%	32.04	4.94	0.78
BSE Smallcap	51093.23	-1.88%	32.25	3.55	0.65
BSE 250 LargeMidCap	11181.7	-0.31%	24.2	4.42	1.12
<b>Sectoral Indices</b>					
BSE Fmcg	20221.77	-0.92%	38.68	8.49	1.8
BSE Commodity	7716.66	-0.45%	25.11	3.14	1.09
BSE CD	9919.8	-0.82%	47.86	7.16	0.65
BSE Energy	11914.06	-0.87%	11.58	1.99	2.66
BSE Financial Services	13225.7	-0.25%	18.62	3.12	0.87
BSE Healthcare	44425.69	-1.03%	39.08	6.67	0.53
BSE IT	37364.44	2.83%	28.08	7.82	2.25
BSE Auto	62112.92	0.58%	32.38	6.86	1.09
BSE Bankex	67018.67	0.11%	16.75	2.86	0.77
BSE Metal	34247.38	0.40%	18.87	2.93	1.72
BSE Oil & Gas	27947.46	-0.93%	10.3	1.68	2.89
BSE Power	6501.06	-1.72%	27.02	3.8	1.43
BSE Realty	6936.09	-1.13%	43.51	5.71	0.33

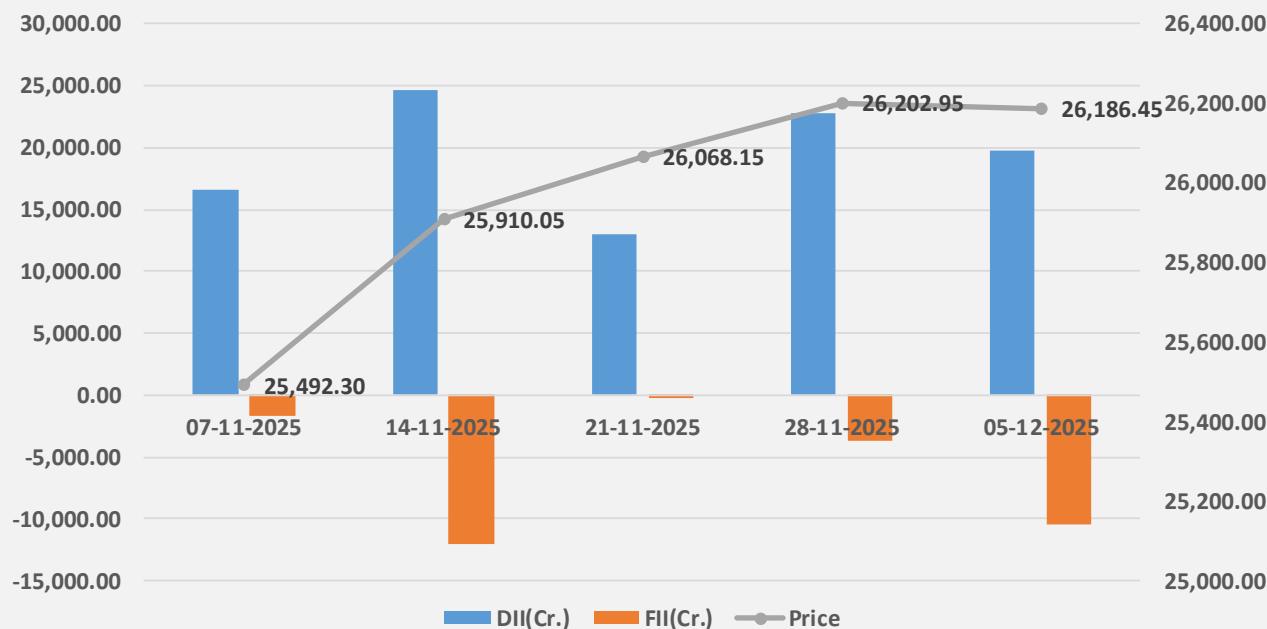
### Gainers

Symbol	LTP	%Change (Wow)	%Change (MoM)
HCL Technologies Ltd	1683	3.60	11.30
Infosys Ltd	1616.2	3.60	9.40
Tech Mahindra Ltd	1570.8	3.50	13.30
Asian Paints Ltd	2968.5	3.30	13.60
Tata Consultancy Services Ltd	3238.2	3.20	8.20

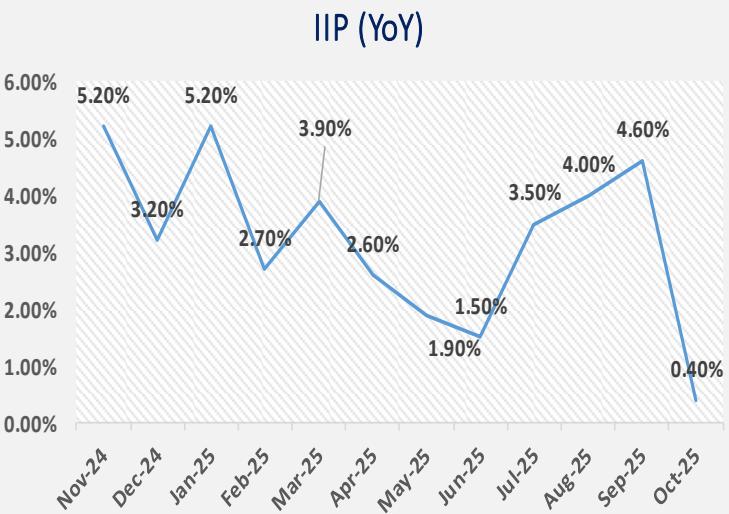
### Losers

Symbol	LTP	%Change (Wow)	%Change (MoM)
Hindustan Unilever Ltd	2338.6	-5.20	-3.10
Eternal Ltd	292.4	-2.60	-4.50
Titan Ltd	3813.3	-2.40	1.20
Reliance Industries Ltd	1540.6	-1.70	4.20
Trent Ltd	4183.1	-1.60	-9.60

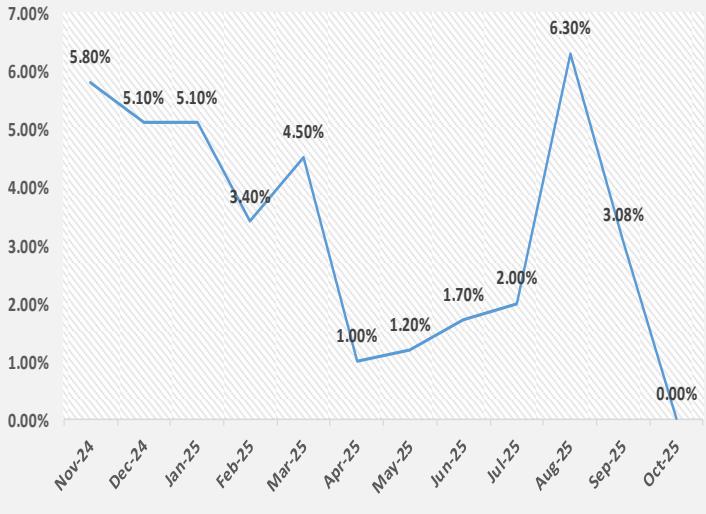
## FII & DII Investment Flow Vs NIFTY50



## Macro-Economic Performance: India



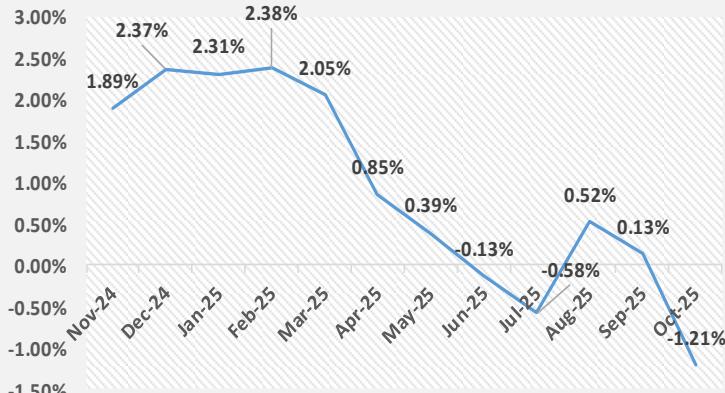
## Infrastructure Output (YoY)



## CPI (YoY)

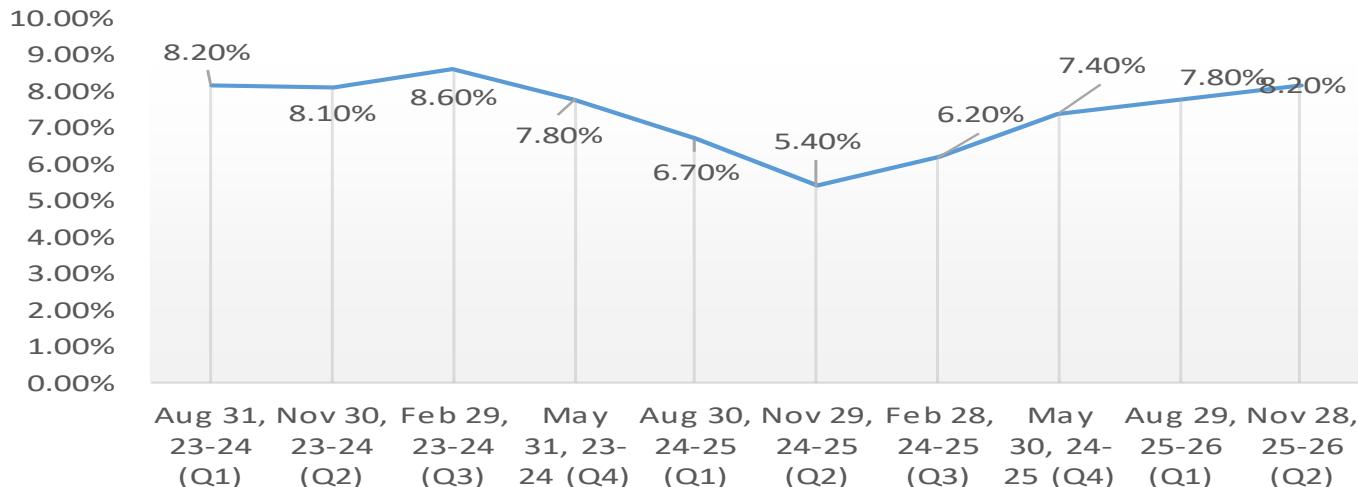


## WPI (YoY)



## Market View from Research Desk:

## India GDP Growth Data (YoY)



**NIFTY (26,186.45):** Indian equity market saw VIX dropping by 11.21% showing improved risk appetite. Global equities were firm, led by the Nasdaq and Dow, helping stabilize sentiment for Indian IT and export-oriented sectors. Commodities saw strong gains in silver, copper, and energy prices, especially natural gas and WTI crude, point to rising industrial demand globally but also signal potential cost pressure for Indian metals consumers and energy-intensive sectors. Copper growing is positive for global cyclical sentiment and supports domestic metal stocks. The rupee remained weak as it tested higher levels of Rs.90.462, reinforcing positive for export-driven IT and pharma while creating negative sentiment for import-heavy sectors such as oil marketing companies, aviation and consumer durables. A slight decline in India's 10-year bond yield reflects easing domestic financial conditions, which is generally positive for banks, NBFCs and rate-sensitive sectors like real estate and autos. Positive Sectors are likely to be IT, metals, banks, NBFCs and export-oriented pharma, while negative may include aviation, oil marketing, consumer durables.

Nifty 50 traded in a tight but well-defined range through the week, repeatedly taking strong support near 25,900–26,000 and facing resistance around 26,150–26,200. The index slipped from higher levels on 1–3 December, even touching a weekly low near 25,891, but buyers consistently absorbed declines, preventing any breakdown. Momentum shifted on 4 December as Nifty regained the 26,000 mark, and the rally strengthened on 5 December with a close at 26,186.45, forming higher highs and indicating a clear short-term trend reversal. The weekly structure shows consolidation at lower levels after a bullish recovery. The Resistance is in between 26569-26734 and Support is in between 25918-25535.

Global manufacturing activity is contracting across major economies like the US, Europe, China, Japan, and other Asian nations, indicating weak global demand that may pressure India's export-oriented manufacturing sectors. European firms are shifting supply chains out of China due to export-control concerns, creating a strategic opportunity for India to attract new business, especially in manufacturing, chemicals, intermediates, and textiles. Rising US natural gas prices could raise India's energy import bill and squeeze margins for energy-intensive industries. Meanwhile, India and Russia signing 16 agreements across defence, trade, economy, and healthcare may boost long-term cooperation. Domestically, renewable capacity is forecast to reach 60–80 GW by 2030, and NHAI's MoU with Reliance Jio to deploy telecom-based safety systems highlights ongoing infrastructure and digital integration efforts. Sectors look for: manufacturing exports, chemicals, textiles, OMC's, renewables, defence, and infrastructure companies.

In the upcoming week, Japan will release Q3 GDP growth and current account data, while China will report its November trade balance and inflation. The US will release CPI inflation, PPI data along with FOMC interest rate decision along with other important data. UK will announce GDP growth, Industrial production too. India's major data point is CPI inflation for November along with industrial production and foreign exchange reserves, to guide domestic policy expectations.

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