INDIA WEEKLY MARKET SNAPSHOT

04th Aug 2025

SBI-SG
One Stop Solution For All Investments

Top News

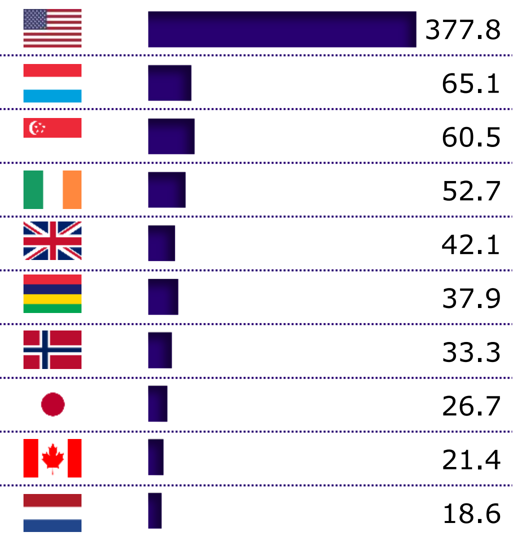
- India's forex reserves rise to $698.19 billion, up $2.7 billion as of July 25
- SEBI Proposes To Allow QIBs To Invest In REITs and InvITs As Strategic Investors
- SEBI Proposes Flexible Retail Quota for Big IPOs To Boost Participation
- Highest fall in lending rates in June: RBI data
- FPI flows reverse: Foreign investors pull Rs 17,741 crore from equities in July
- Muted response to RBI's VRRR as overnight rates rise, reducing arbitrage
- Inflation likely to be below RBI's target in FY26: FinMin review
- RBI buys half a tonne of gold in June; fastest growing component of India's forex reserves
- Brokers association to recommend SEBI to increase entry barriers to F&O
- Market regulator SEBI opens innovation sandbox to fractional share pitch
- IMF Raises India's Growth Forecast to 6.4% for 2025 and 2026
- India's industrial production grows 1.5% in June, driven by manufacturing

Regulatory Notifications

- SEBI removes CP Code Requirement for NRIs Trading in Derivatives
- RBI caps investment by banks, NBFCs at 20% of corpus of AIF scheme
- SEBI issues mechanism for monitoring of minimum investment threshold under SIF
- IFSCA amends Fund Management regulations
- IFSCA's Framework for Transition Bonds: Bridging Brown with Green

FPI Assets Under Custody (AUC): Equity Jun 25

Top 10 Countries (USD Bn)



Domestic Sectoral Indices

Indices	01 Aug 25	1 Week Change
Bank Nifty	55,618	-1.61% ▼
Fin Nifty	26,493	-1.18% ▼
Nifty Pharma	22,012	-2.87% ▼
Nifty FMCG	56,197	2.96% ▲
Nifty IT	34,650	-2.73% ▼
Nifty Metal	9,102	-3.42% ▼
Nifty O&G	11,091	-2.34% ▼
Nifty Realty	896	-5.73% ▼

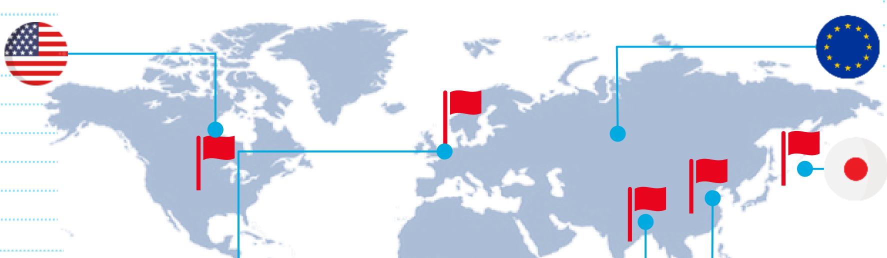
Key Economic Indicators

Indicator	Value	Date
Inflation	2.10%	(June 25) ▼
FII Inflows	USD 1.59 Bn	(May 25) ▲
Forex Reserves	USD 698.2 Bn	(25 Jul 25) ▲
INR USD Rate	INR 87.35	(01 Aug 25) ▲
GDP Rate	7.4%	(Q4 24 25) ▲
IIP Growth	1.5%	(June 25) ▲
Crude Oil/WTI (USD/Bbl.)	USD 67.26	(01 Aug 25) ▲
Gold (USD/t.oz)	USD 3,362.5	(01 Aug 25) ▲

Broad Market Indices

Indices	Bloomberg Symbol	01 Aug 25	1 Week Change
Domestic Indices			
BSE Sensex	SENSEX:IND	80,600	-1.06% ▼
Nifty 50	NIFTY:IND	24,565	-1.09% ▼
Foreign Indices			
Dow Jones	INDU:IND	43,589	-2.92% ▼
Nasdaq	CCMP:IND	20,650	-2.17% ▼
Hang Seng	HSI:IND	24,508	-3.47% ▼
DAX	DAX:IND	23,426	-3.27% ▼
Nikkei	NKY:IND	40,800	-1.58% ▼

Major Economic Events and Holidays (August 2025)



01 Aug	Manufacturing PMI Rate, Non Farm Payrolls, Unemployment rate
05 Aug	ISM Services PMI
12 Aug	Inflation Rate
14 Aug	PPI
15 Aug	Retail Sales
28 Aug	GDP Growth Rate

07 Aug	BoE Interest Rate Decision
12 Aug	Unemployment Rate
14 Aug	GDP Growth Rate
20 Aug	Inflation Rate
21 Aug	Manufacturing & Services PMI
22 Aug	Retail Sales
25 Aug	Late Summer Bank Holiday

06 Aug	RBI Interest Rate Decision
12 Aug	Inflation Rate
15 Aug	Independence Day
27 Aug	Ganesh Chaturthi
28 Aug	IIP
29 Aug	GDP Growth Rate

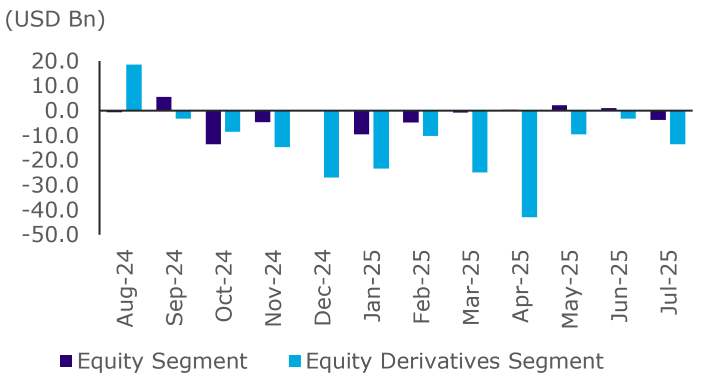
01 Aug	Inflation Rate
29 Aug	Inflation rate – Germany, France, Italy

11 Aug	Mountain Day
15 Aug	GDP Growth Rate
20 Aug	Balance of Trade
22 Aug	Inflation rate
29 Aug	Consumer Confidence

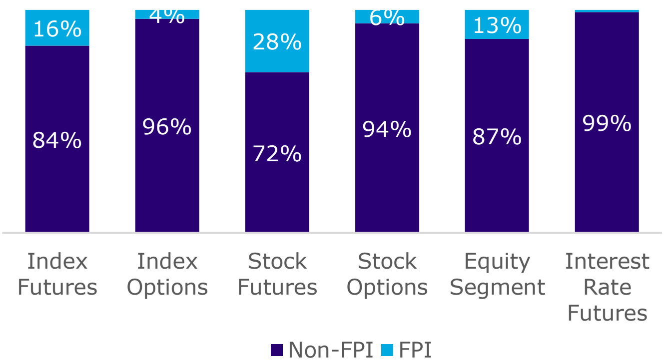
07 Aug	Balance of Trade, Exports, Imports
09 Aug	Inflation Rate
15 Aug	Industrial Production, Retail Sales
31 Aug	Manufacturing PMI

BRIEF OVERVIEW: MARKET STATISTICS (I)

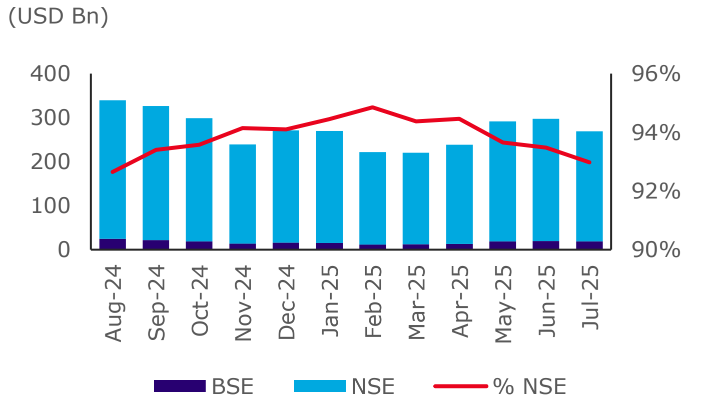
FPI Net Investment Flows



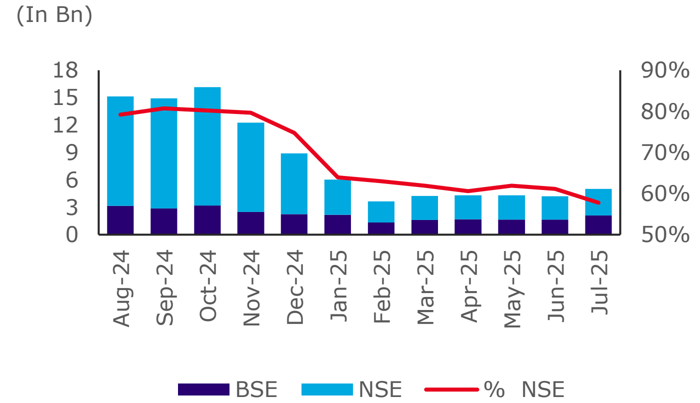
FPI Share v/s Other Client Category



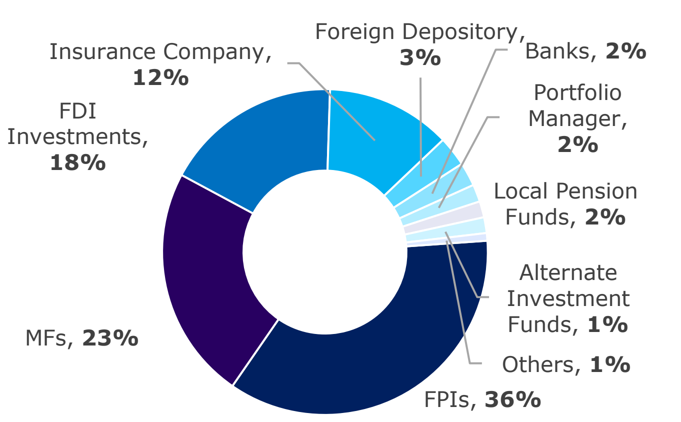
Equity Turnover



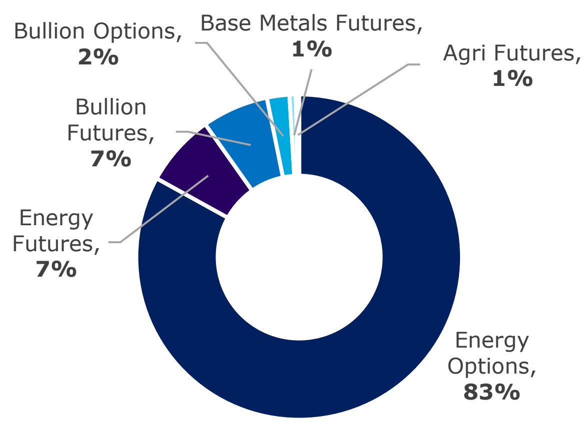
Equity Derivatives – Contracts Traded



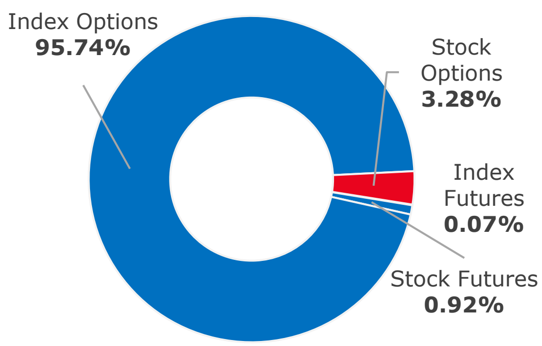
AUC Basis Client Category



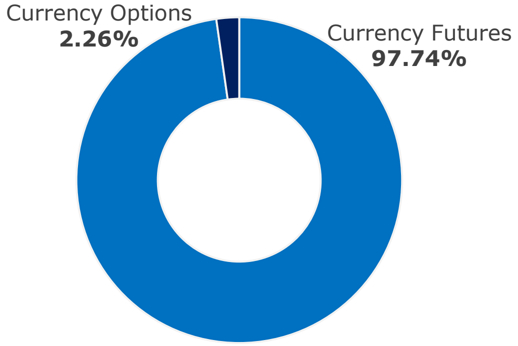
Commodity Derivatives



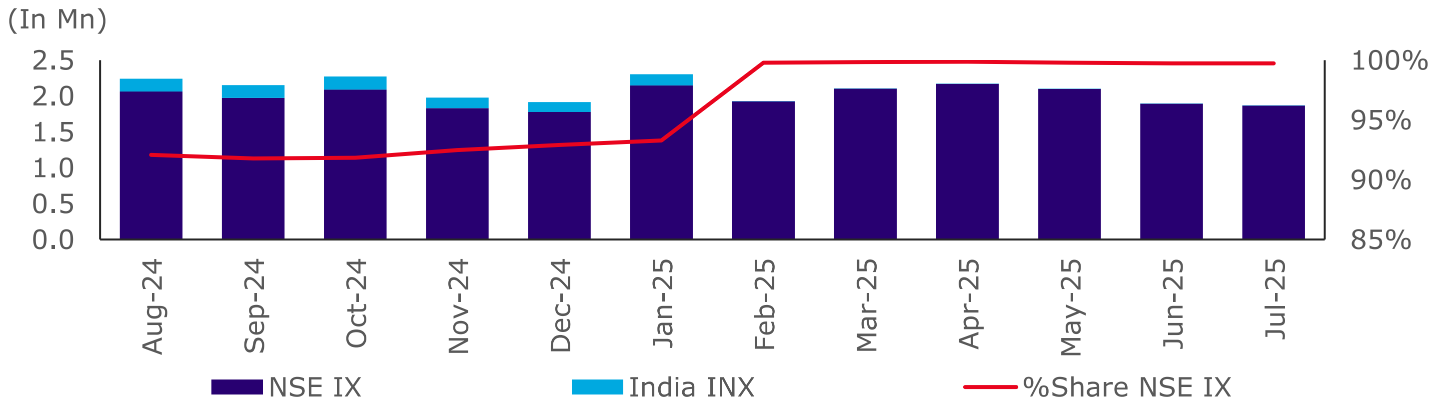
Equity Derivatives Breakdown



FX Derivatives Breakdown



GIFT City Turnover – Contracts Traded



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