INDIA WEEKLY MARKET SNAPSHOT

21st July 2025

SBI-SG

One Stop Solution For All Investments

Top News

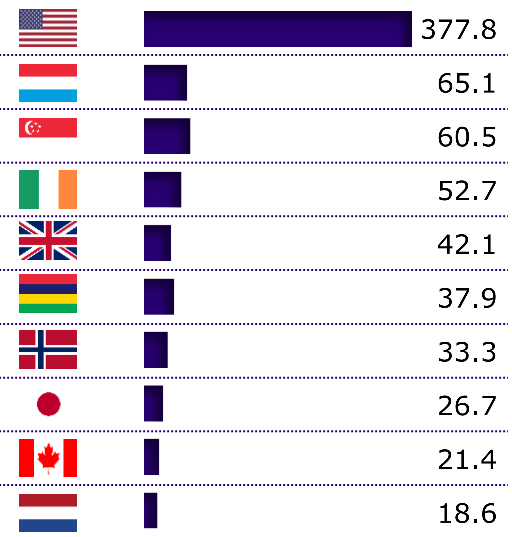
- SEBI looks to extend tenure of derivatives contracts, wants to deepen cash markets
- Gift City may see its first IPO soon, marking a new era for unlisted firms
- RBI governor says inflation, growth equally important to decide future rate cuts
- AIF Commitments Comparable To Equity Mutual Fund Inflow SEBI's Ananth Narayan
- Indian GDP likely to grow 6.5% in FY26 despite global shocks says EAC PM Chief
- SEBI proposes to standardize valuation methods of gold, silver ETFs
- SEBI proposes review of mutual fund scheme categorisation to curb overlap
- Electricity derivatives tools for hedging, not speculation: SEBI chief
- RBI's liquidity absorption via VRRR auction narrows funds with SDF to Rs 1 lakh crore
- Jane Street scandal wipes out 35% of index options premium turnover on NSE
- Services exports cut India's trade deficit by 9.4% in Q1
- Foreign investors pull out Rs 5,524 crore in July
- India's forex reserves dip $3.06 billion to $696.67 billion in a second straight week decline
- IFSCA initiates action against 9 FMEs in GIFT City over closed offices and absent KMPs

Regulatory Notifications

- SEBI issues master circular for Portfolio Managers

FPI Assets Under Custody (AUC): Equity Jun 25

Top 10 Countries (USD Bn)



Domestic Sectoral Indices

Indices	18 Jul 25	1 Week Change
Bank Nifty	56,283	0.83% ▼
Fin Nifty	26,556	1.11% ▼
Nifty Pharma	22,593	1.65% ▲
Nifty FMCG	56,507	1.07% ▲
Nifty IT	37,142	1.46% ▼
Nifty Metal	9,458	0.80% ▲
Nifty O&G	11,772	0.11% ▲
Nifty Realty	1,000	3.84% ▲

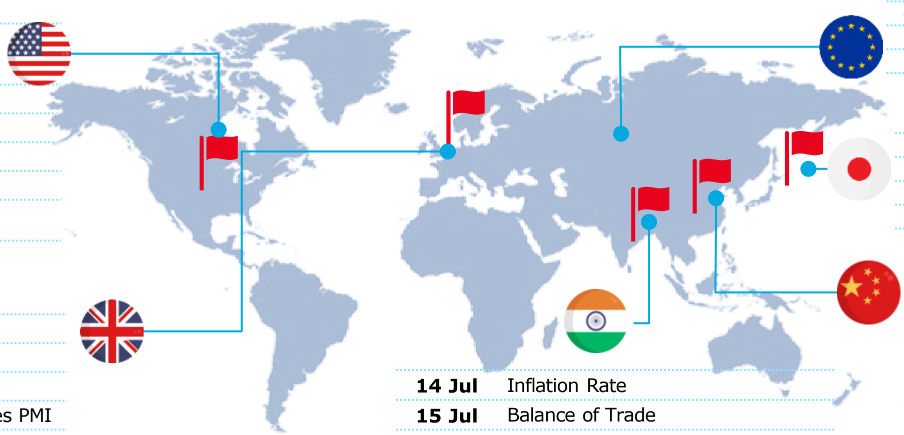
Key Economic Indicators

Indicator	Value	Date	
Inflation	2.82%	(May 25)	▼
FII Inflows	USD 0.84 Bn	(Apr 25)	▼
Forex Reserves	USD 696.7 Bn	(11 Jul 25)	▼
INR USD Rate	INR 86.20	(18 Jul 25)	▲
GDP Rate	7.4%	(Q4 24 25)	▲
IIP Growth	1.2%	(May 25)	▼
Crude Oil/WTI (USD/Bbl.)	USD 67.30	(18 Jul 25)	▲
Gold (USD/t.oz)	USD 3,349.4	(18 Jul 25)	▲

Broad Market Indices

Indices	Bloomberg Symbol	18 Jul 25	1 Week Change
Domestic Indices			
BSE Sensex	SENSEX:IND	81,758	0.90% ▼
Nifty 50	NIFTY:IND	24,968	0.72% ▼
Foreign Indices			
Dow Jones	INDU:IND	44,342	0.07% ▼
Nasdaq	CCMP:IND	20,896	1.51% ▲
Hang Seng	HSI:IND	24,826	2.84% ▲
DAX	DAX:IND	24,290	0.14% ▲
Nikkei	NKY:IND	39,819	0.63% ▲

Major Economic Events and Holidays (July 2025)



01 Jul	Manufacturing PMI Rate
03 Jul	ISM Services PMI, Non Farm Payrolls, Unemployment rate
04 Jul	Independence day
15 Jul	Inflation Rate
16 Jul	PPI
17 Jul	Retail Sales
30 Jul	GDP Growth Rate, Fed Interest Rate Decision

11 Jul	GDP Growth Rate
16 Jul	Inflation Rate
17 Jul	Unemployment Rate
24 Jul	Manufacturing & Services PMI
25 Jul	Retail Sales

14 Jul	Inflation Rate
15 Jul	Balance of Trade
28 Jul	IIP

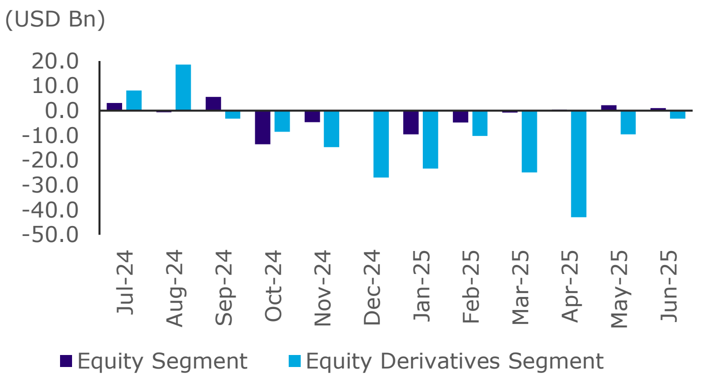
01 Jul	Inflation Rate
24 Jul	ECB Interest Rate Decision
30 Jul	GDP Growth Rate

17 Jul	Balance of Trade
18 Jul	Inflation rate
21 Jul	Marine day
31 Jul	BOJ Interest Rate

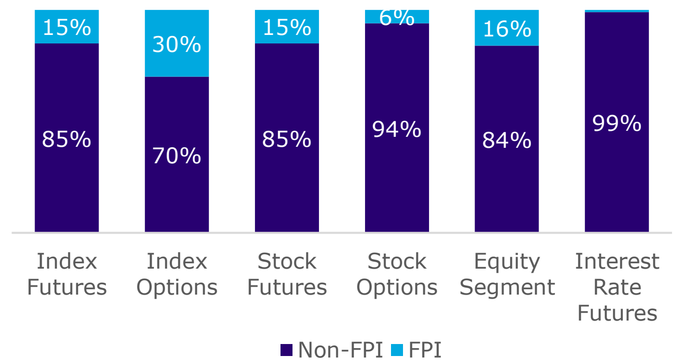
09 Jul	Inflation Rate
12 Jul	Balance of Trade, Exports, Imports
15 Jul	GDP Growth Rate, Industrial Production, Retail Sales
31 Jul	Manufacturing PMI

BRIEF OVERVIEW: MARKET STATISTICS (I)

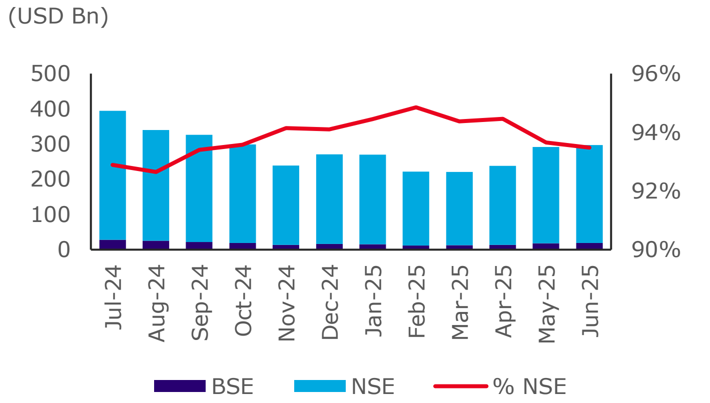
FPI Net Investment Flows



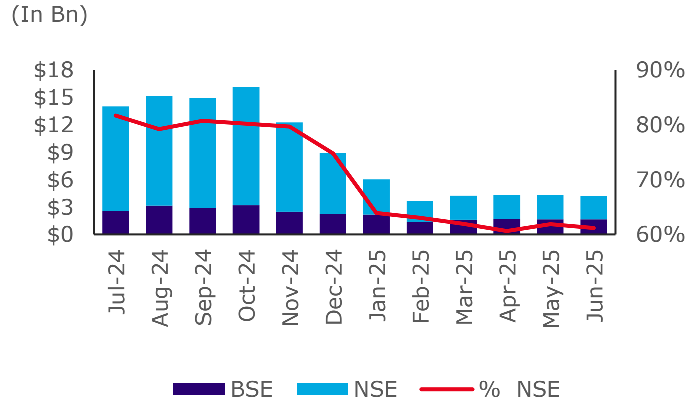
FPI Share v/s Other Client Category



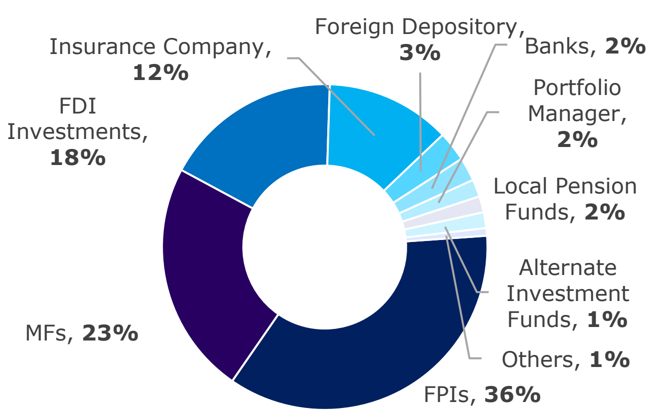
Equity Turnover



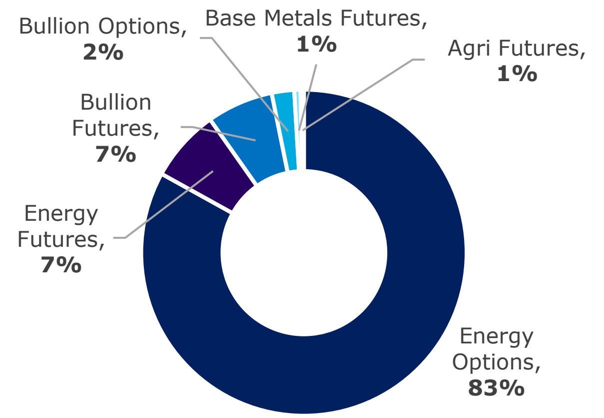
Equity Derivatives – Contracts Traded



AUC Basis Client Category



Commodity Derivatives



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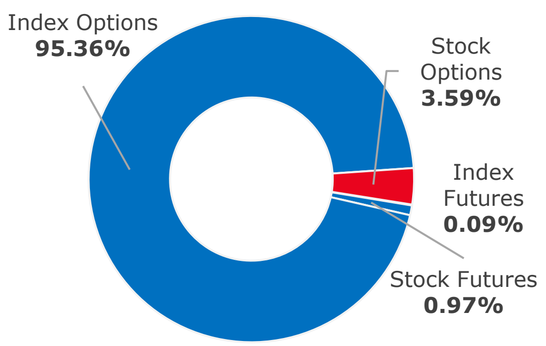
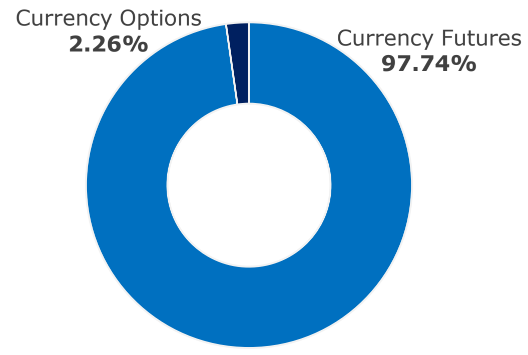
BRIEF OVERVIEW: MARKET STATISTICS (II)

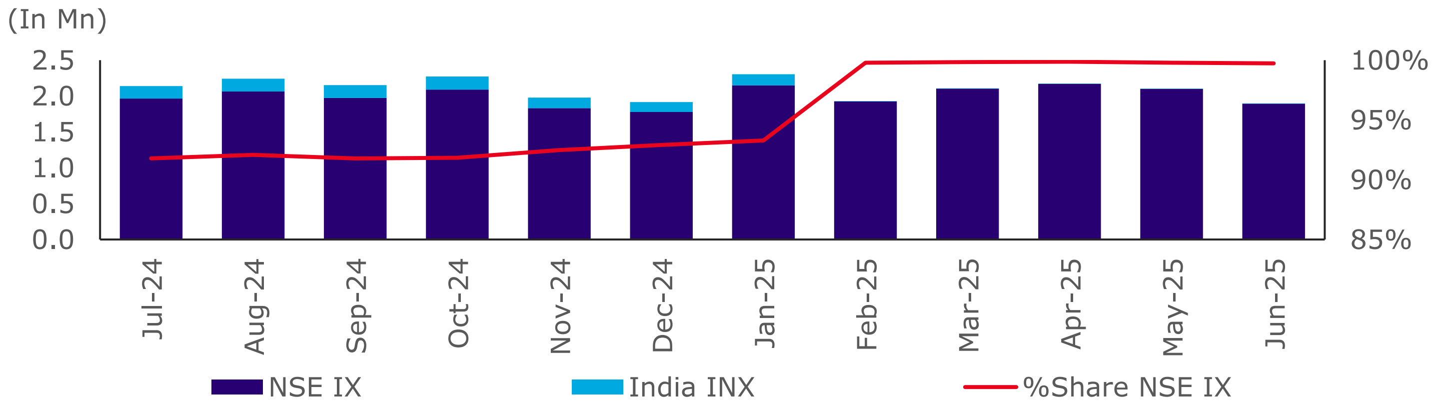
Equity Derivatives Breakdown



FX Derivatives Breakdown



GIFT City Turnover – Contracts Traded



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