











# INDIA WEEKLY MARKET SNAPSHOT

28<sup>th</sup> July 2025

## Top News

- Indian economy can grow over 6.5% in FY26 without hurdles: RBI MPC member
- Feb, Apr rate cuts fully transmitted, to help improve growth: RBI Governor
- Rate cuts will depend on outlook, not current inflation: RBI Governor
- SEBI, exchanges revise ESM applicability for firms below ₹1,000 cr mcap
- SEBI gives mutual fund managers freedom to talk "off the record"
- Jane Street allowed to trade with conditions and strong monitoring by exchanges
- ADB lowers India's FY26 growth forecast to 6.5%, cites impact of US tariffs
- Sanjay Kaul takes charge as head of GIFT City
- NSE issues retail algo trading rulebook, mandates strategy registration
- India's forex reserves slip for second week, down \$1.18 billion: RBI data
- SEBI proposes to ease disclosure norms for debenture issuers
- Banks rush for VRR amid call rate spike
- SEBI launches unified compliance platform for brokers to boost ease of doing business
- RBI's financial inclusion index hits 67 in March 2025, reflecting growth
- Duty-free access to U.K. under FTA to drive foreign investment into India
- Resurgence of India rate-cut wagers revives foreign investor interest in bonds

## FPI Assets Under Custody (AUC): Equity Jun 25

Top 10 Countries		(USD Bn)
		377.8
		65.1
		60.5
		52.7
		42.1
		37.9
		33.3
		26.7
		21.4
		18.6

## Domestic Sectoral Indices

Indices	25 Jul 25	1 Week Change
Bank Nifty	56,529	0.44% ▲
Fin Nifty	26,808	0.95% ▲
Nifty Pharma	22,663	0.31% ▲
Nifty FMCG	54,580	-3.41% ▼
Nifty IT	35,624	-4.09% ▼
Nifty Metal	9,425	-0.35% ▼
Nifty O&G	11,356	-3.53% ▼
Nifty Realty	951	-4.93% ▼

## Key Economic Indicators

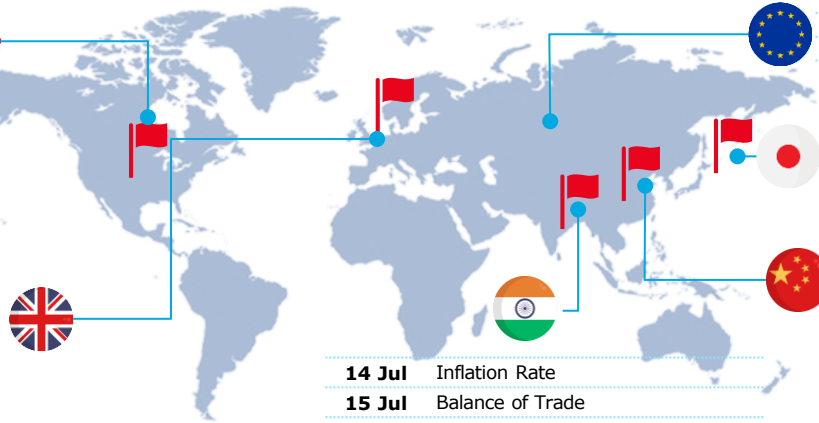
Indicator	Value	Date
Inflation	2.10%	(June 25) ▼
FII Inflows	USD 1.59 Bn	(May 25) ▲
Forex Reserves	USD 695.5 Bn	(18 Jul 25) ▼
INR USD Rate	INR 86.53	(25 Jul 25) ▲
GDP Rate	7.4%	(Q4 24 25) ▲
IIP Growth	1.2%	(May 25) ▼
Crude Oil/WTI (USD/Bbl.)	USD 65.07	(25 Jul 25) ▼
Gold (USD/t.oz)	USD 3,337.0	(25 Jul 25) ▼

## Broad Market Indices

Indices	Bloomberg Symbol	25 Jul 25	1 Week Change
Domestic Indices			
BSE Sensex	SENSEX:IND	81,463	-0.36% ▼
Nifty 50	NIFTY:IND	24,837	-0.53% ▼
Foreign Indices			
Dow Jones	INDU:IND	44,902	1.26% ▲
Nasdaq	CCMP:IND	21,108	1.02% ▲
Hang Seng	HSI:IND	25,388	2.27% ▲
DAX	DAX:IND	24,218	-0.30% ▼
Nikkei	NKY:IND	41,456	4.11% ▲

## 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



- 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

- 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

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

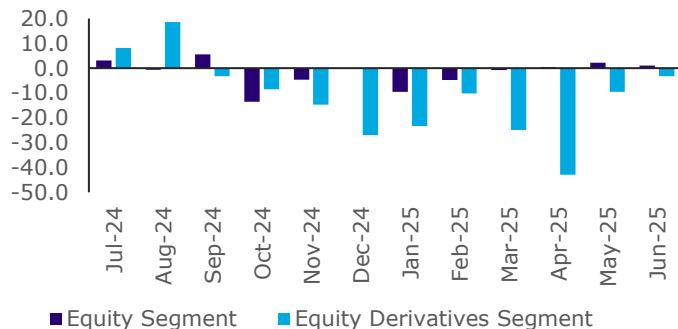


# BRIEF OVERVIEW: MARKET STATISTICS (I)

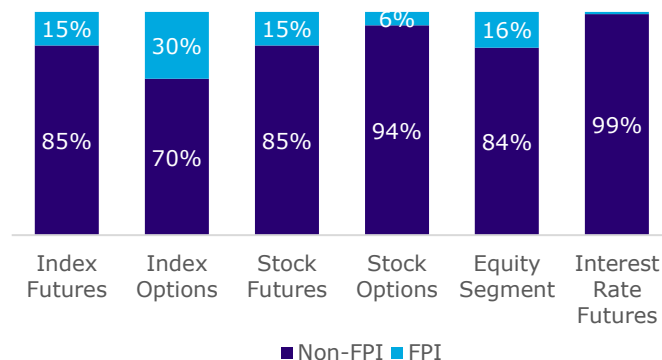


## FPI Net Investment Flows

(USD Bn)

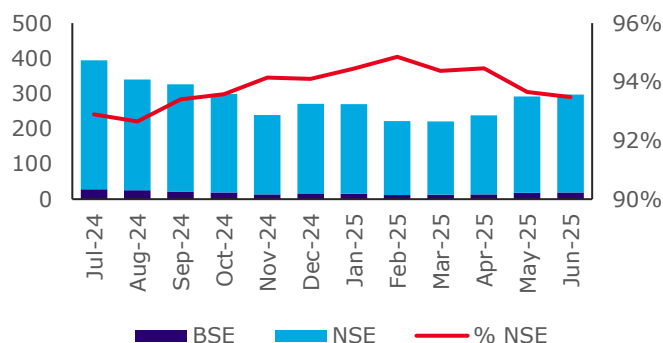


## FPI Share v/s Other Client Category



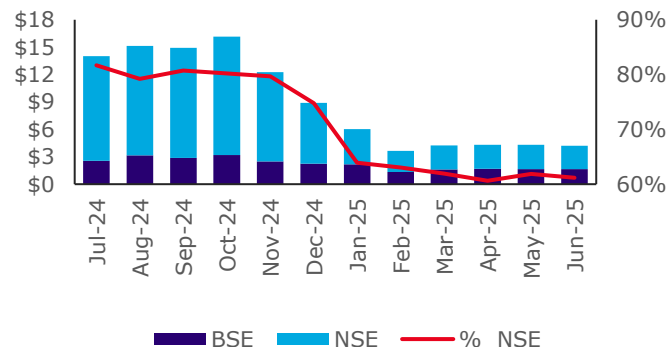
## Equity Turnover

(USD Bn)

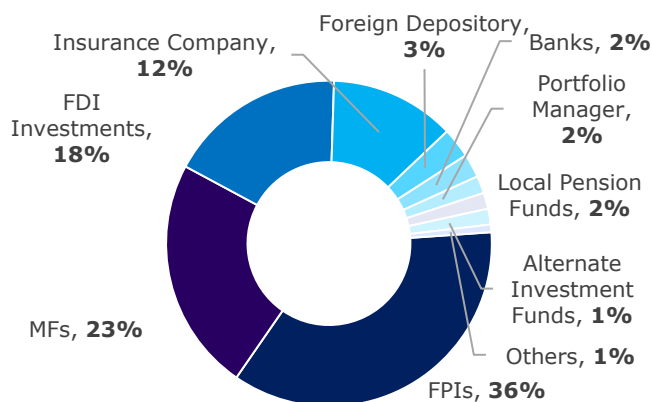


## Equity Derivatives – Contracts Traded

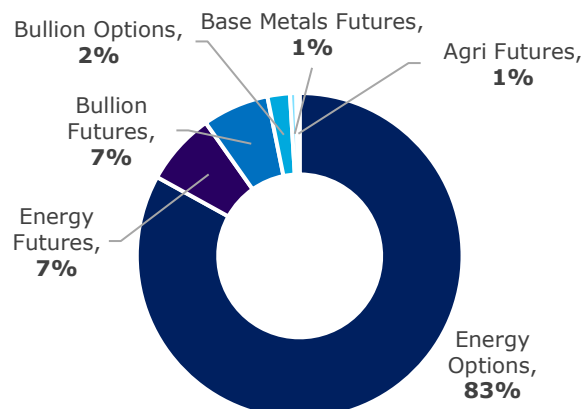
(In Bn)



## AUC Basis Client Category



## Commodity Derivatives

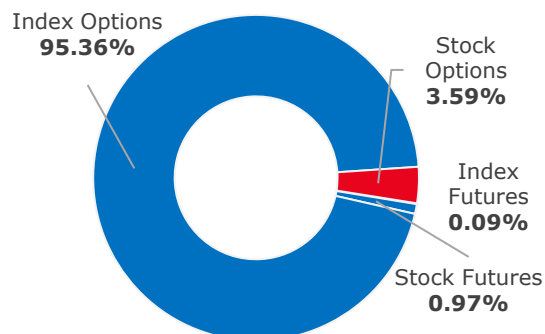




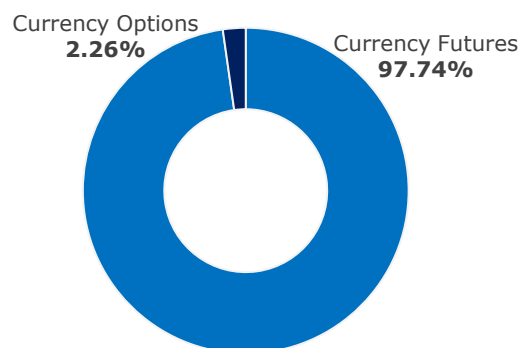
## BRIEF OVERVIEW: MARKET STATISTICS (II)



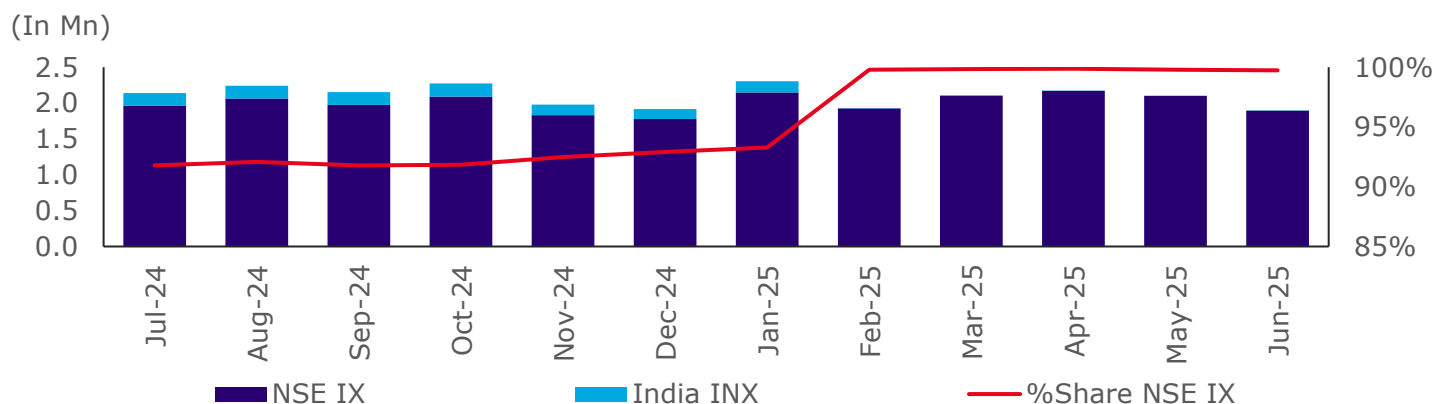
### Equity Derivatives Breakdown



### FX Derivatives Breakdown



### GIFT City Turnover – Contracts Traded



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