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Weekly Market Update

Dec 01, 2025 -Dec 05, 2025

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE Midcap	BSE Smallcap
Dec 05, 2025	85712	26186	46617	51093
Nov 28, 2025	85706	26202	47211	52053
1 Week change (%)	0.01	-0.06	-1.26	-1.84
1 Month change (%)	2.88	2.65	-0.07	-3.70
YTD Change (%)	9.18	10.29	-0.12	-8.35

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Dec 05, 2025	67018	44425	37364	62112	20221	34247
Nov 28, 2025	66946	44883	36305	61750	20407	34112
1 Week change (%)	0.11	-1.02	2.92	0.59	-0.09	0.40
1 Month change (%)	3.40	-0.18	8.11	4.48	-1.13	0.56
YTD Change (%)	15.72	-2.29	-13.63	18.76	-3.05	18.67

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	23.38	22.80	33.13	28.76
P/B	4.54	3.56	4.45	3.51
Dividend yield	1.14	1.28	0.80	0.73

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Dec 05, 2025	-438.90	4189.17
MTD-Dec 2025	-10403.62	19785.50
YTD (Jan 2025 Onwards)	-282472.09	728349.97

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Dec 04, 2025
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.25%
10 Year Gilt	6.55%

Debt indicators (%)	Dec 04, 2025
3 Month CD rate	6.02%
1 year CD rate	6.44%
3 Month CP rate	6.04%
5 Year Corp bond	6.94%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	0.25% (Oct-2025)
WPI	-1.21% (Oct-2025)
GDP growth rate	8.20% (Jul-Sep 2025)
IIP	0.40% (Oct-2025)

GLOBAL MARKETS

GLOBAL EQUITY INDICES

	Dow Jones (USA)	FTSE 100 (UK)	Nikkei (Japan)	Hang seng (HK)
Dec 05, 2025	47954	9667	50491	26085
Nov 28, 2025	47716	9720	50253	25858
1 Week change (%)	0.50	-0.55	0.47	0.88
1 Month change (%)	2.22	-0.71	-0.77	-1.51
YTD Change (%)	13.12	17.03	28.45	32.93

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Dec 05, 2025	63.42	128221	178236
Nov 28, 2025	61.50	126033	164052
1 Week Change (%)	3.12	1.74	8.65
1 Month Change (%)	0.06	6.69	20.62
YTD Change (%)	-16.48	68.91	107.61

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Dec 05, 2025	90.03	120.05	104.82	57.96
Nov 28, 2025	89.43	118.41	103.68	57.26
1 Week Change (%)	0.67	1.39	1.10	1.22
1 Month Change (%)	1.67	3.87	2.97	0.85
YTD Change (%)	5.20	12.06	18.33	6.60

NEWS SUMMARY

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- Indian equity indices snapped three weeks gaining streak and ended the week on flat note. Markets started the week on negative note as the rupee hit a new record low amid foreign outflows and uncertainty over key trade negotiations with the U.S. However, A 25-basis-point rate cut by the Reserve Bank of India (RBI) and the central bank's proposal for a ₹1.45 lakh crore liquidity infusion through bond purchases and dollar-rupee swaps boosted domestic market sentiment, helping the benchmarks to end on flat note. The broader market indices underperformed the benchmarks as BSE MidCap and SmallCap were declined by 1.26% and 1.84%, respectively. All sectoral indices closed on a mixed note. BSE Information Technology was the major gainer, up 2.92% and Nifty Realty fell for the 5th straight week.

- Looking ahead, In the coming week, markets will closely track India's CPI print on December 12, following October's record-low inflation reading of 0.25%, along with data on loan growth, deposit growth, and forex reserves. Globally, the spotlight will be on the U.S. Federal Reserve's interest rate decision, which could drive risk sentiment across emerging markets.

- India's Services Purchasing Managers' Index (PMI) increased to 59.8 in Nov 2025 from 58.9 in Oct 2025, boosted by domestic demand. Meanwhile, the composite PMI slipped to 59.7 in Nov 2025 from 60.4 in Oct 2025.

- The total gross Goods and Services Tax (GST) revenue grew by 0.7% YoY and stood at Rs. 1.70 lakh crore in Nov 2025, compared to Rs. 1.69 lakh crore in Nov 2024.

- India's current account deficit moderated to US$ 12.3 billion (1.3% of GDP) in Q2FY26 from US$ 20.8 billion (2.2% of GDP) in Q2FY25.

NEWS SUMMARY

- The Manufacturing Purchasing Managers' Index (PMI) eased to 56.6 in Nov 2025, down from 59.2 in Oct. This marks the slowest improvement in operating conditions since Feb 2025, although the sector remains above its long-run average of 54.2.

- The Index of Industrial Production (IIP) rose 0.4% YoY in Oct 2025, following an upwardly revised 4.6% increase in Sep 2025. This marks the smallest annual growth rate since Aug 2024, when industrial output stalled. Electricity production slumped 6.9% due to extended rainfall and mild temperatures across several states. Mining output fell 1.8%, while manufacturing grew 1.8%.

- Bond yields declined as stronger-than-expected demand at the state debt auction boosted sentiment and triggered short-covering. Additionally, the central bank's proposal for a ₹1.45 lakh crore liquidity infusion through bond purchases helped to reduce bond yields • Yield on the 10-year benchmark paper (6.33% GS 2035) fell by 3 bps to close at 6.50% as compared to the previous week's close of 6.53%.

- Government data showed that Gross Domestic Product (GDP) of the Indian economy at constant (2011-12) prices witnessed a growth of 8.2% YoY in the second quarter of FY26. In the Jul-Sep quarter of last year, the GDP growth rate was 5.6%. On the sectoral front, the growth of Manufacturing sector climbed to 9.1% in Q2 of FY26 from 2.2% in same quarter of previous fiscal year. The growth of Agriculture, Livestock, Forestry & Fishing grew by 3.5% in Q2 of FY26 compared to 4.1% rise in Q2 of FY25, while Mining & Quarrying fell marginally in the same period.

- The RBI's, The MPC voted unanimously to reduce the policy repo rate by 25 basis points (bps) to 5.25 per cent with immediate effect. The MPC also raised FY26 GDP growth estimates to 7.3% from 6.8% earlier. It reduced FY26 CPI Inflation forecast to 2% from 2.6% earlier.

NEWS SUMMARY

- Asian equity markets closed on a mixed note as investors adopted a cautious stance ahead of upcoming rate decisions by the Federal Reserve.

- European shares ended the week with modest gains, while investors evaluated a long-delayed U.S. inflation report that reinforced expectations for a Federal Reserve interest rate cut next week. The pan-European STOXX 600 index was up 0.4%, building on the previous week's rally.

- U.S. equity markets rose after a report from payroll processor ADP showed an unexpected decline in private-sector employment for Nov 2025. The data reinforced optimism that the Federal Reserve may lower interest rates at its monetary policy meeting next week. For the week, the S&P 500 gained 0.31%, the Nasdaq rose 0.91%, and the Dow climbed 0.5%. All three indexes recorded a second straight weekly advance.

- U.S. services PMI rose slightly to 52.6 in Nov 2025, compared to 52.4 in Oct, according to the Institute for Supply Management.

- U.S. private sector employment declined by 32,000 jobs in Nov 2025, following an upwardly revised increase of 47,000 jobs in Oct, according to a report released by a payroll firm.

- China’s Services Purchasing Managers’ Index (PMI) fell to 52.1 in Nov 2025, based on survey data from S&P Global.

- China’s manufacturing Purchasing Managers’ Index (PMI) fell to 49.9 in Nov 2025 from 50.6 in Oct, according to survey results from S&P Global.

- The Eurozone’s manufacturing Purchasing Managers’ Index (PMI) fell to 49.6 in Nov 2025 from 50.0 in Oct, according to final survey data from S&P Global
- The Indian rupee declined against the U.S. dollar due to negative trends in domestic equities. weighed down by the absence of a trade deal between India and the U.S
- Brent crude oil spot prices ended higher after U.S.-proposed Russia–Ukraine peace talks failed to yield a breakthrough.
- Gold prices ended higher amid reinforced expectations of a U.S. Federal Reserve rate cut.

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