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Weekly Market Update

Dec 15, 2025 -Dec 19, 2025

AMFI Registered Mutual Fund Distributor

DOMESTIC MARKETS

EQUITY MARKET INDICES

	BSE Sensex	Nifty 50	BSE Midcap	BSE Smallcap
Dec 19, 2025	84929	25966	46547	50800
Dec 12, 2025	85267	26046	46477	50890
1 Week change (%)	-0.40	-0.31	0.15	-0.18
1 Month change (%)	-0.82	-0.86	-1.53	-3.76
YTD Change (%)	8.18	9.36	-0.27	-7.94

SECTORAL INDICES

	BSE Bankex	BSE Healthcare	BSE IT	BSE Auto	BSE FMCG	BSE Metal
Dec 19, 2025	66140	43947	37448	61533	20099	34843
Dec 12, 2025	66662	44085	37004	61846	20022	34896
1 Week change (%)	-0.78	-0.31	1.20	-0.51	0.38	-0.15
1 Month change (%)	-0.79	-1.50	3.89	0.37	-1.46	1.22
YTD Change (%)	14.21	-3.34	-13.43	17.65	-3.63	20.73

MARKET FUNDAMENTALS

Ratios	BSE Sensex	Nifty 50	Nifty Midcap 150	Nifty Smallcap 250
P/E	23.17	22.61	32.97	28.51
P/B	4.50	3.53	4.44	3.48
Dividend yield	1.15	1.29	0.80	0.74

FII AND DII NET BUYING (CASH)

	FII (in Crores)	DII (in Crores)
Dec 19, 2025	1830.89	5722.89
MTD-Dec 2025	-19857.37	52032.12
YTD (Jan 2025 Onwards)	-291925.84	760596.59

KEY DEBT MARKET INDICATORS

Debt indicators (%)	Dec 18, 2025
Repo rate	5.25%
Reverse repo rate	3.35%
MSF rate	5.50%
TREP	5.15%
10 Year Gilt	6.57%

Debt indicators (%)	Dec 18, 2025
3 Month CD rate	6.08%
1 year CD rate	6.66%
3 Month CP rate	6.10%
5 Year Corp bond	7.13%

KEY MACRO INDICATORS

Key Macro indicators	
CPI	0.71% (Nov-2025)
WPI	-0.32% (Nov-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 19, 2025	48134	9897	49507	25690
Dec 12, 2025	48458	9649	50836	25976
1 Week change (%)	-0.67	2.57	-2.61	-1.10
1 Month change (%)	5.21	3.88	-0.64	-0.56
YTD Change (%)	13.55	19.82	25.95	30.92

COMMODITIES

Commodities	Brent Crude ($/BBL)	Gold (INR/10 GM)	Silver (INR/1 KG)
Dec 19, 2025	59.60	131340	200144
Dec 12, 2025	60.57	131684	193844
1 Week Change (%)	-1.60	-0.26	3.25
1 Month Change (%)	-3.98	7.45	29.38
YTD Change (%)	-21.51	73.01	133.13

MOVEMENT OF RUPEE VS OTHER CURRENCIES

	US Dollar	British Pound	EURO	100 Yen
Dec 19, 2025	89.58	119.85	104.93	56.79
Dec 12, 2025	90.52	121.06	106.30	58.07
1 Week Change (%)	-1.04	-1.00	-1.29	-2.20
1 Month Change (%)	1.24	3.71	2.77	0.76
YTD Change (%)	4.67	11.87	18.46	4.45

NEWS SUMMARY

NEWS SUMMARY

- Indian equity markets declined amid weak global cues, with lingering uncertainty around tariffs, and a weakening rupee driven by import demand and persistent foreign portfolio outflows. Key benchmark indices BSE Sensex and Nifty 50 lost 0.40% and 0.31% respectively. The broader market indices, BSE MidCap rose by 0.15% and BSE SmallCap declined by 0.18%, respectively. All sectoral indices closed on a mixed note. BSE Information Technology was the major gainer, up 1.20%.

- Looking ahead, Analysts expect that stock markets are likely to trade in a range-bound manner in a holiday-shortened week where trading activity of foreign investors, currency movement and global macroeconomic data announcements are expected to drive sentiments. Several global markets may see subdued activity on account of Christmas and New Year holidays. On the domestic front, markets will track infrastructure output data, along with updates on bank loan growth, deposit growth, and foreign exchange reserves. Currency movement and crude oil prices will also remain important variables.

- India's Consumer Price Index (CPI)-based inflation rose by 0.71% YoY in Nov 2025, compared to a 0.25% increase in Oct 2025, driven by higher prices of vegetables, protein-rich items, and fuel. This marked the tenth consecutive month that inflation remained below the RBI's medium-term target of 4%.

- India's wholesale price index (WPI)-based inflation fell 0.32% YoY in Nov 2025, following a 1.21% drop in Oct 2025, primarily driven by a decrease in food prices, mineral oils, and crude petroleum & natural gas.

NEWS SUMMARY

- India's electronics manufacturing sector is set for a major boost under the EMC 2.0 scheme, which targets Rs. 1.46 lakh crore investment across ten states and aims to create 1.80 lakh jobs. The initiative offers world-class infrastructure, strengthens supply chains, and promotes skill development, with several projects already underway.

- India's merchandise trade deficit narrowed annually to $24.53 billion in Nov 2025, compared to $31.93 billion in Nov 2024. Exports rose 19.38% YoY to $38.13 billion in Nov 2025, while imports fell 1.89% YoY to $62.66 billion during the same period.

- The RBI Governor signaled that interest rates will remain low for an extended period amid supportive monetary policy. He highlighted that trade deals could lift growth by up to 0.5% points.

- Bond yields ended largely unchanged as persistent supply concerns were offset by support from the inclusion of a former benchmark security in this week's central bank open-market purchase. Yield on the 10-year benchmark paper (6.48% GS 2035) rose by 1 bps to close at 6.61% as compared to the previous week's close of 6.60%.

- India and Oman signed a Comprehensive Economic Partnership Agreement that, for the first time, includes traditional medicine. The pact gives Indian AYUSH products wider market access and promotes cooperation on licensing, standards, research, and medical value travel.

- The Union Minister of Road Transport and Highways announced plans to boost highway construction to 60 km per day, with a target of 10,000 km of National Highways this fiscal, and aims to make India's automobile sector the world's largest within a decade.

NEWS SUMMARY

- Asian equity markets mostly declined following the US stock indices amid concerns about stretched valuations in technology stocks. Japanese markets also hit three week lows as investors assessed the outlook for artificial intelligence and data center businesses.

- European equity markets gained after the Bank of England's decision to lower interest rates by 25 basis points, along with expectations of further monetary easing by the Federal Reserve after data showed a smaller-than expected increase in U.S. consumer price inflation, helped underpin sentiment.

- U.S. equity markets fell amid renewed weakness in technology stocks, as reflected by the steep drop in the tech-heavy Nasdaq.

- U.S. equity markets closed on mixed note as concerns over AI spending continued to weigh on sentiment. For the week, the S&P gained 0.11% and the Nasdaq rose 0.48%. Meanwhile, the Dow fell 0.67%.

- The yen weakened sharply against the dollar and other major currencies as traders drove it towards levels that could trigger official buying, after the Bank of Japan raised rates to a 30-year high.

- U.S. consumer prices in Nov 2025 were up by 2.7% compared to the same month a year ago, according to the Labor Department.

- U.K. consumer price index rose 3.2% YoY in Nov 2025, slower than the 3.6% increase in Oct 2025, according to the Office for National Statistics.

- Eurozone’s trade surplus climbed to EUR 18.4 billion in Oct 2025, up from EUR 7.1 billion a year earlier, based on official data.
- Japan recorded a merchandise trade surplus of 322.2 billion yen in Nov 2025, according to the Ministry of Finance.
- U.K. gross domestic product unexpectedly fell by 0.1% MoM in Oct 2025, matching the pace of decline seen in Sep, according to the Office for National Statistics.
- Gold prices slightly declined as markets digested softer-than-expected U.S. inflation data.
- The Indian rupee strengthened against the U.S. dollar amid suspected aggressive intervention by the central bank.
- Brent crude oil prices (spot) dropped on lingering oversupply concerns and worries that a potential Russia-Ukraine peace deal could lead to increased supply.

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