

Current Market Scenario

13th Dec 2025

Nifty Upward Channel CAPSTOCKS

NIFTY 50 • 1D • INDICES O25,971.20 H26,057.40 L25,938.45 C26,042.80 +144.25 (+0.56%)

26,046.95
BUY
26,046.95
SELL

EMA 25,959.29



NIFTY IN AN UPWARD CHANNEL



TV

Activate Windows

Go to Settings to activate Windows.

Nifty Higher Lows

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Nifty Resistance & Support

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NIFTY 50 • 1D • INDICES - O 25,971.20 H 26,057.60 L 25,938.45 C 26,046.95 +148.40 (+0.57%)

26,046.95
BUY
26,046.95
SELL

EMA 25,959.69



NIFTY SUPPORT & RESISTANCE



Activate Windows
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Nifty channels

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Broader Market Falls Sharply

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- Select stocks holding benchmark indices
- Valuations reset in Broder markets
- Await continues for US Trade Deal
- Individuals portfolio underperforms

INDEX WATCH

INDEX	13 th Dec	8 th Nov	% Change
Nifty	26,046	25,492	+ 2.1
Sensex	85,267	83,216	+ 2.4
Nifty Midcap	60,283	59,832	+ 0.7
BSE Small Cap	50,890	53,052	- 4.0

Reality Check in Broder Market

- Valuations reset in broader market
- High Valuations, Low Growth shares correcting irrespective of fundamentals
- Story driven stocks fall
- Will be a learning lesson for Post Covid investors who are new to stock markets

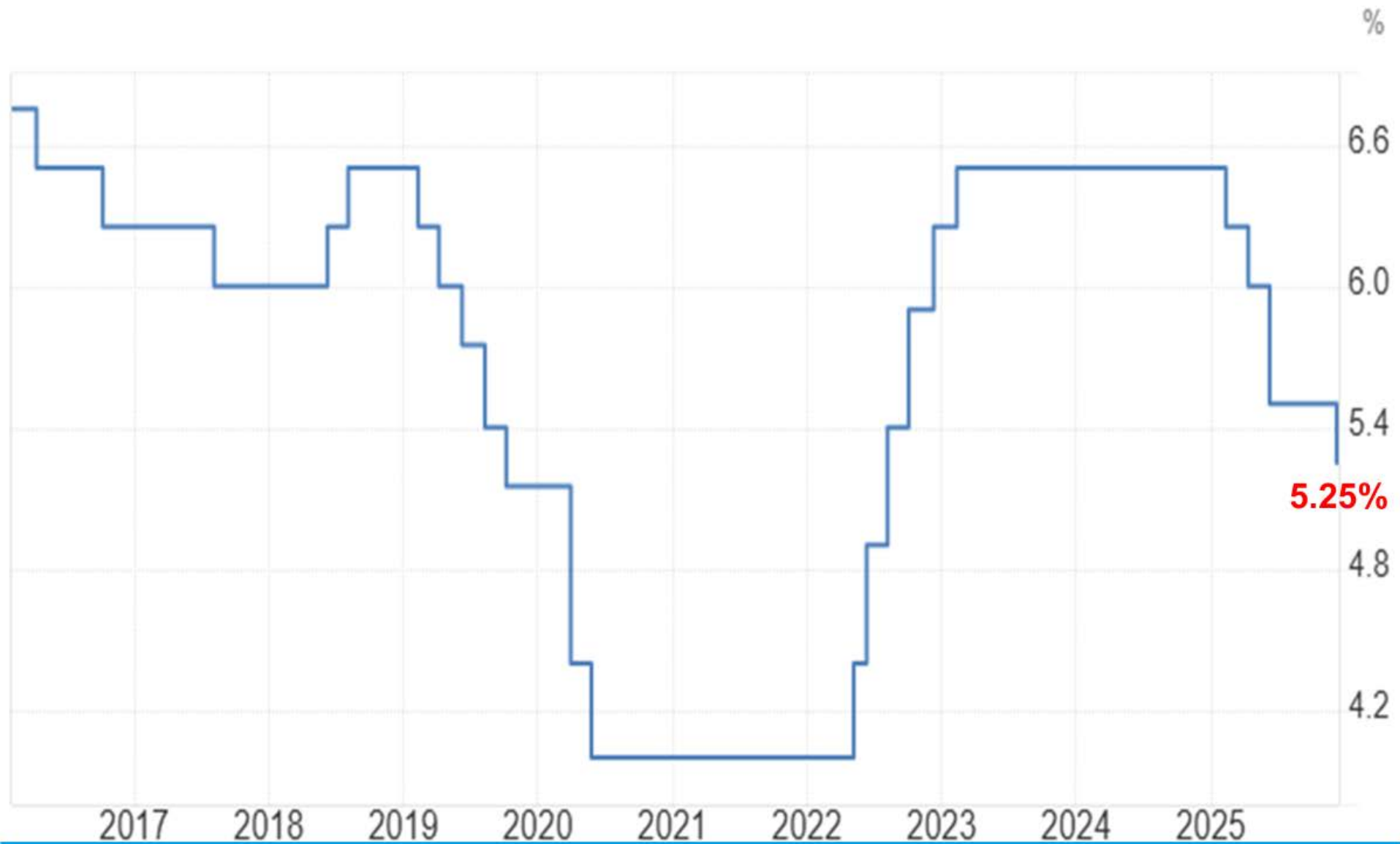
Market Fall

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Indices (10-Dec-2025)	Current Levels	Down % from 52-Week Highs	52 Week High	1 Month Return % [7-Nov-25]	1 Year Return % [9-Dec-24]
Website - Stable Investor .com			Twitter/X - @Stable Investor		
NIFTY 50	25,758.0	-2.16%	26,325.8	1.04%	4.63%
NIFTY NEXT 50	67,572.4	-7.81%	73,298.7	-2.59%	-7.06%
NIFTY 100	26,259.3	-2.23%	26,859.5	0.44%	2.60%
NIFTY 200	14,277.5	-2.49%	14,642.7	0.11%	2.15%
NIFTY 500	23,408.8	-2.61%	24,035.0	-0.48%	0.50%
NIFTY MIDCAP 50	16,918.8	-3.31%	17,498.6	-0.66%	3.10%
NIFTY MIDCAP 100	59,007.8	-3.76%	61,311.3	-1.40%	0.02%
NIFTY MIDCAP 150	21,707.9	-3.50%	22,495.4	-1.45%	-0.19%
NIFTY SMALLCAP 50	8,355.0	-11.17%	9,405.5	-4.38%	-11.47%
NIFTY SMALLCAP 100	17,090.2	-12.80%	19,598.4	-5.45%	-12.49%
NIFTY SMALLCAP 250	16,168.0	-12.18%	18,409.8	-5.01%	-12.11%
NIFTY MICROCAP 250	22,210.4	-16.11%	26,476.9	-5.68%	-15.00%
Website - Stable Investor .com		Source NSEIndia		Twitter/X - @Stable Investor	
Investment in securities market are subject to market risks. Read all the related documents carefully before investing.					
Disclaimer - The funds/indices shown above are for illustration only. It is not a recommendation to buy/sell/hold. Please get in touch with your investment advisor for getting customized investment advice based on your risk profile and unique requirements.					

RBI Repo Rate

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RBI Cuts Repo Rates

- Totally 125 basis points reduced in current rate cut cycle with 4 cut
- RBI may pause from hereon
- May see transmission of reduced interest rate

Rupee Slides To Record Low **CAPSTOCKS**

- Higher Trade deficit
- Shifting of Crude oil purchase from Russia to Other countries
- Delay in US India Trade deal
- Lower capital account flows

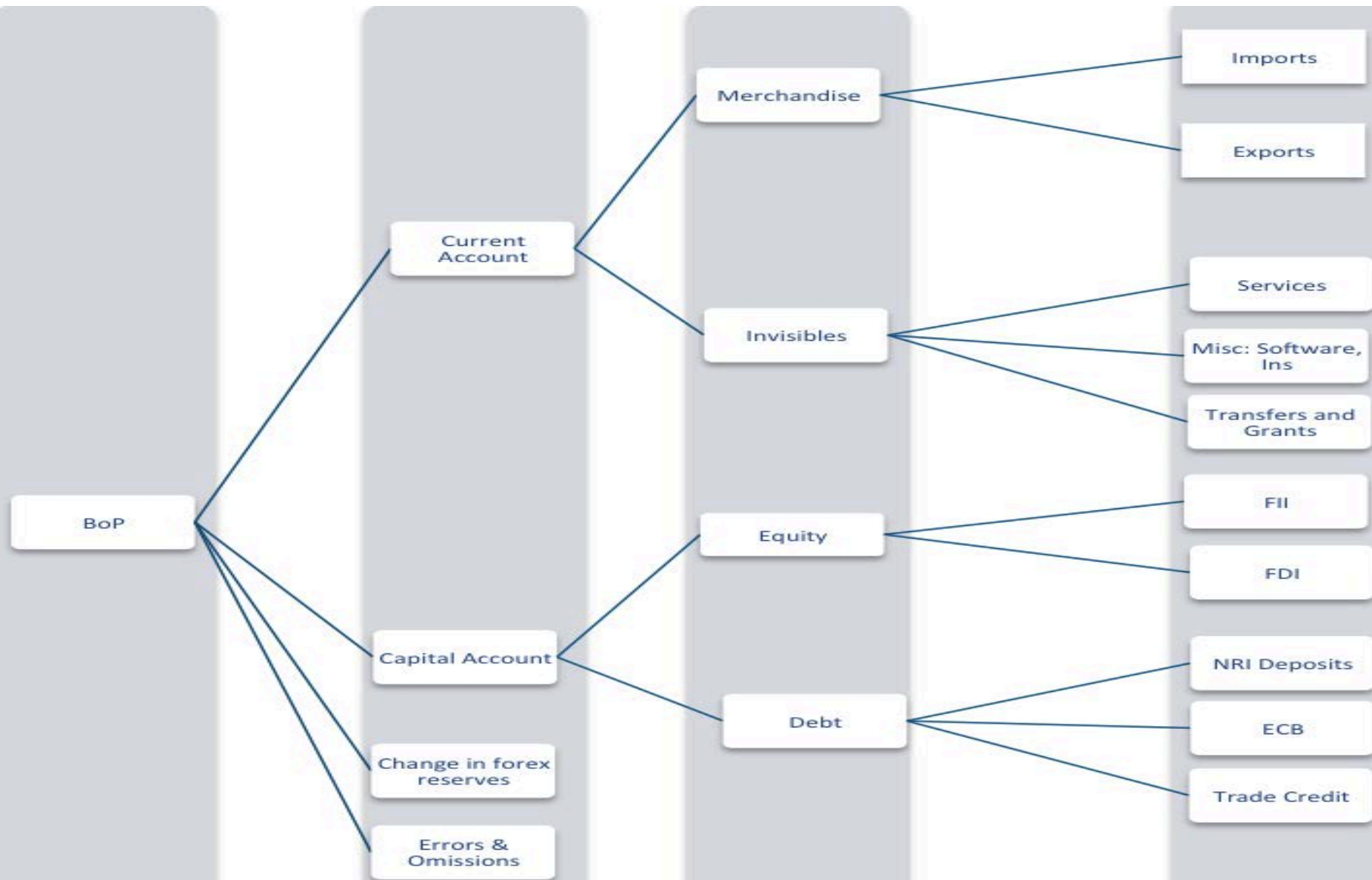
US Dollar Vs Rupee

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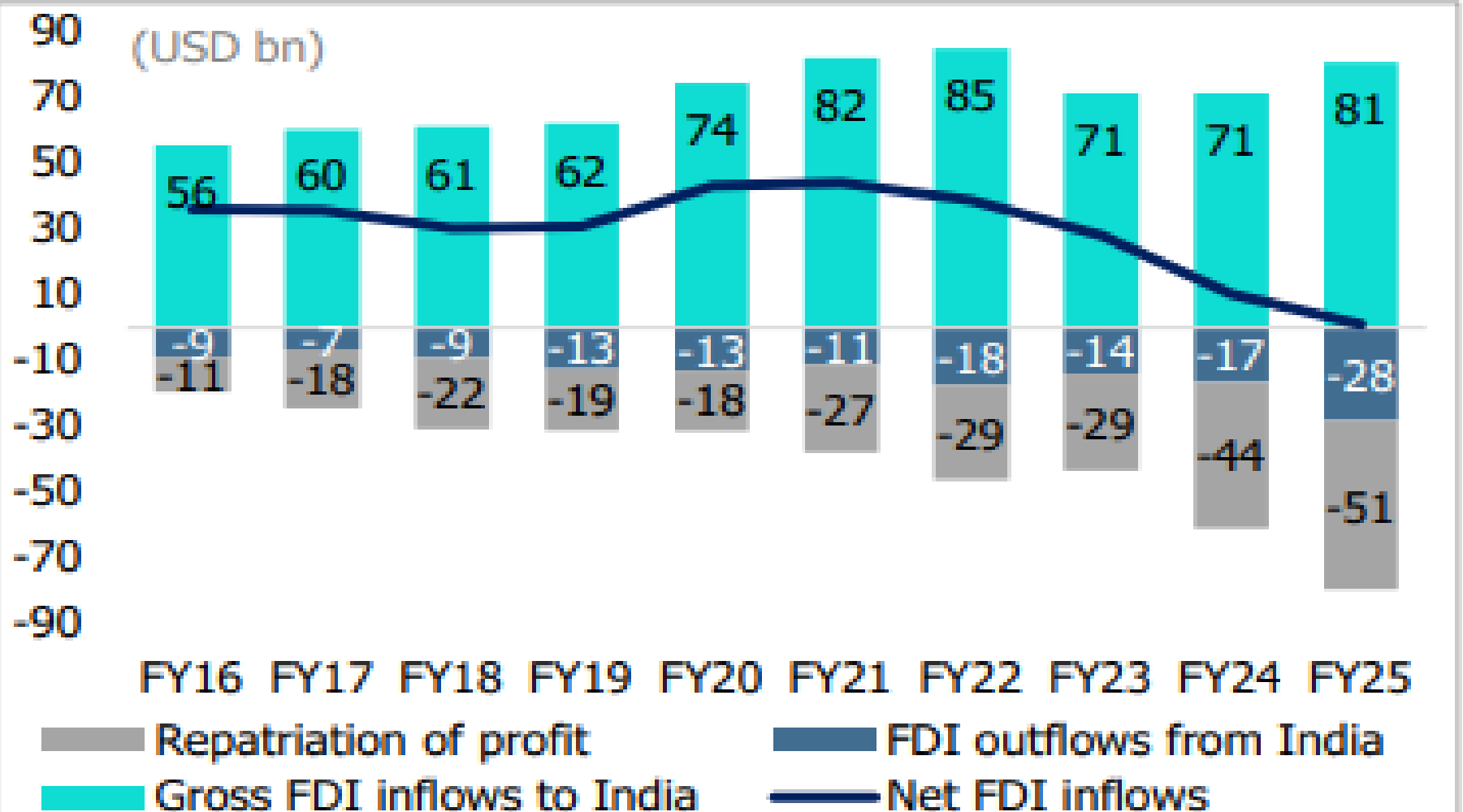


Balance of Payments Chart

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Net FDI Flows Fall Sharply CAPSTOCKS

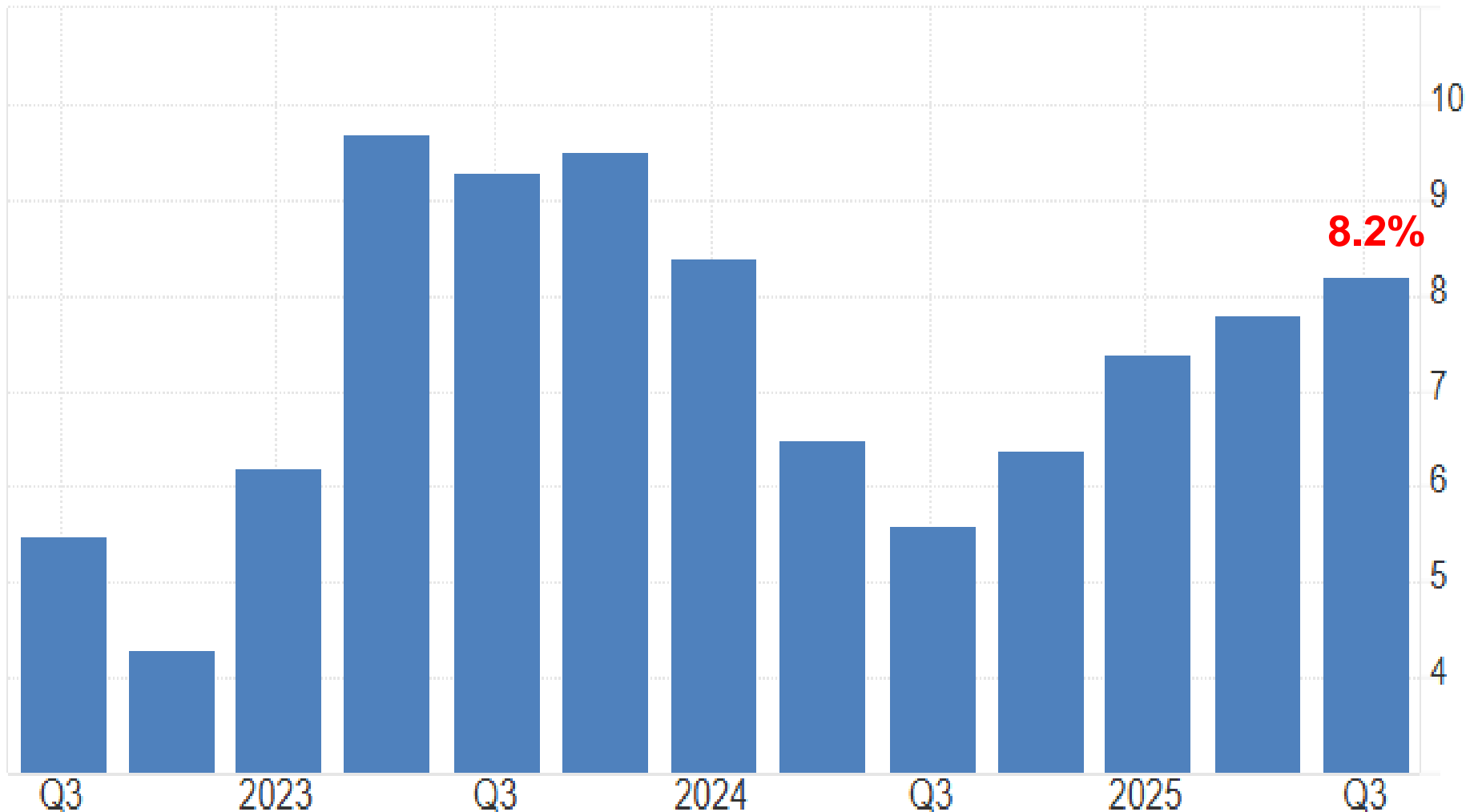


Source: CEIC, CareEdge

Market Awaits US Trade Deal **CAPSTOCKS**

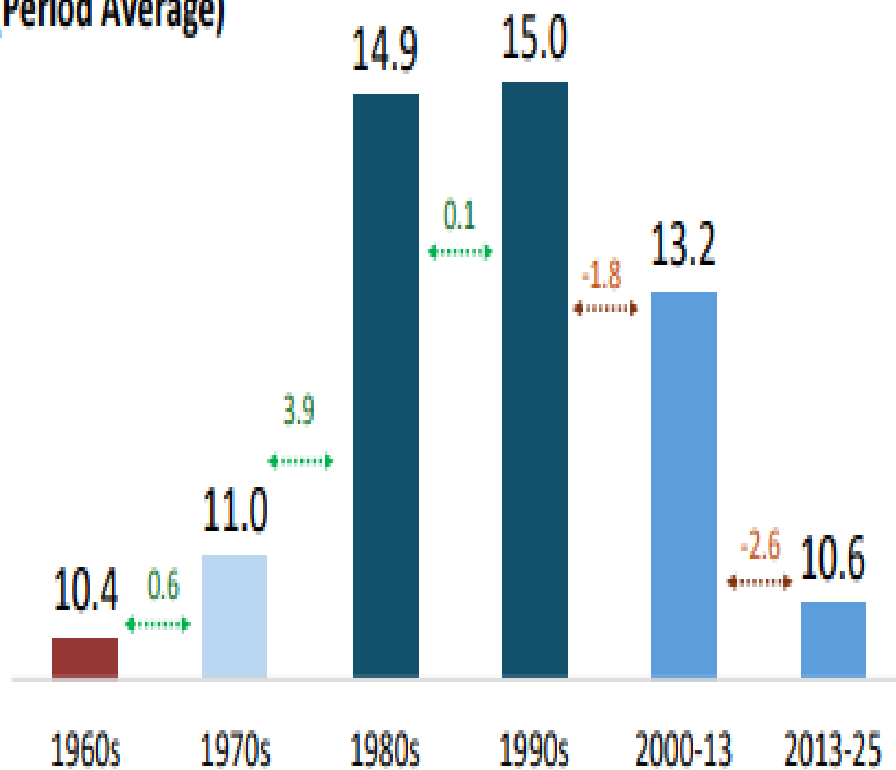
- Indian goods suffers highest tariff in US which is a major competitive disadvantage
- If tariff continues beyond December, Industries exporting to US will be started getting affected

Domestic Q2 GDP Growth



Nominal GDP Growth CAPSTOCKS

India's Nominal GDP Growth - YoY, % Change
(Period Average)



In the 2020s, growth has slowed further and is now settling at 8% to 10% range.

YoY % Change	FY21	FY22	FY23	FY24	FY25	FY26e
Nominal GDP Growth	-1.2	18.9	14.0	12.0	9.8	8.8

Strong Auto Sales

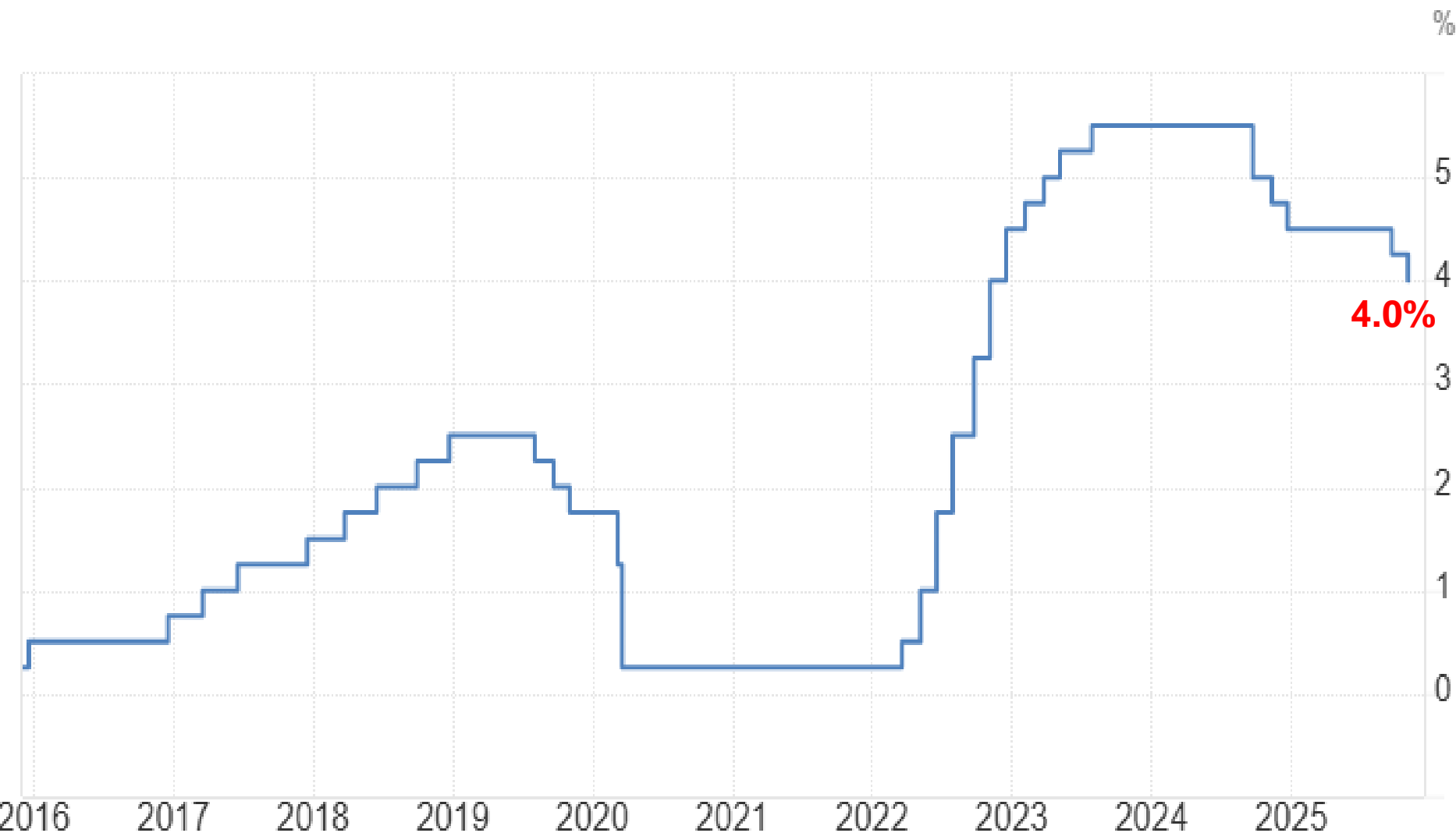
All-India vehicle retail data for November 2025

(in units)

Category	Nov-24	Nov-25	% change
Passenger vehicles	3,29,253	3,94,152	19.71
Two-wheelers	26,27,617	25,46,180	-3.1
Three-wheelers	1,08,317	1,33,951	23.67
Commercial vehicles	79,152	94,935	20
Tractor	80,507	1,26,033	56.55
Total	32,31,526	33,00,832	2.14

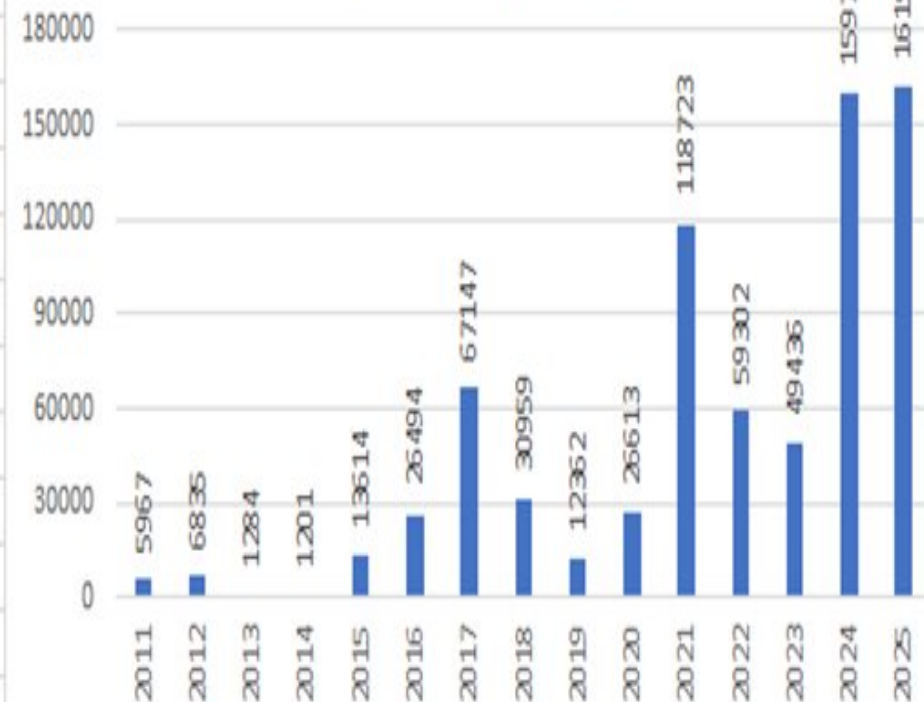
US Fed Cuts Rate Further

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Offer For Sale in Primary Market

Total Fund raised through Primary issues
(IPO+OFS)(Rs Cr)



OFS have dominated primary market in India



FPI Cash Market Actions

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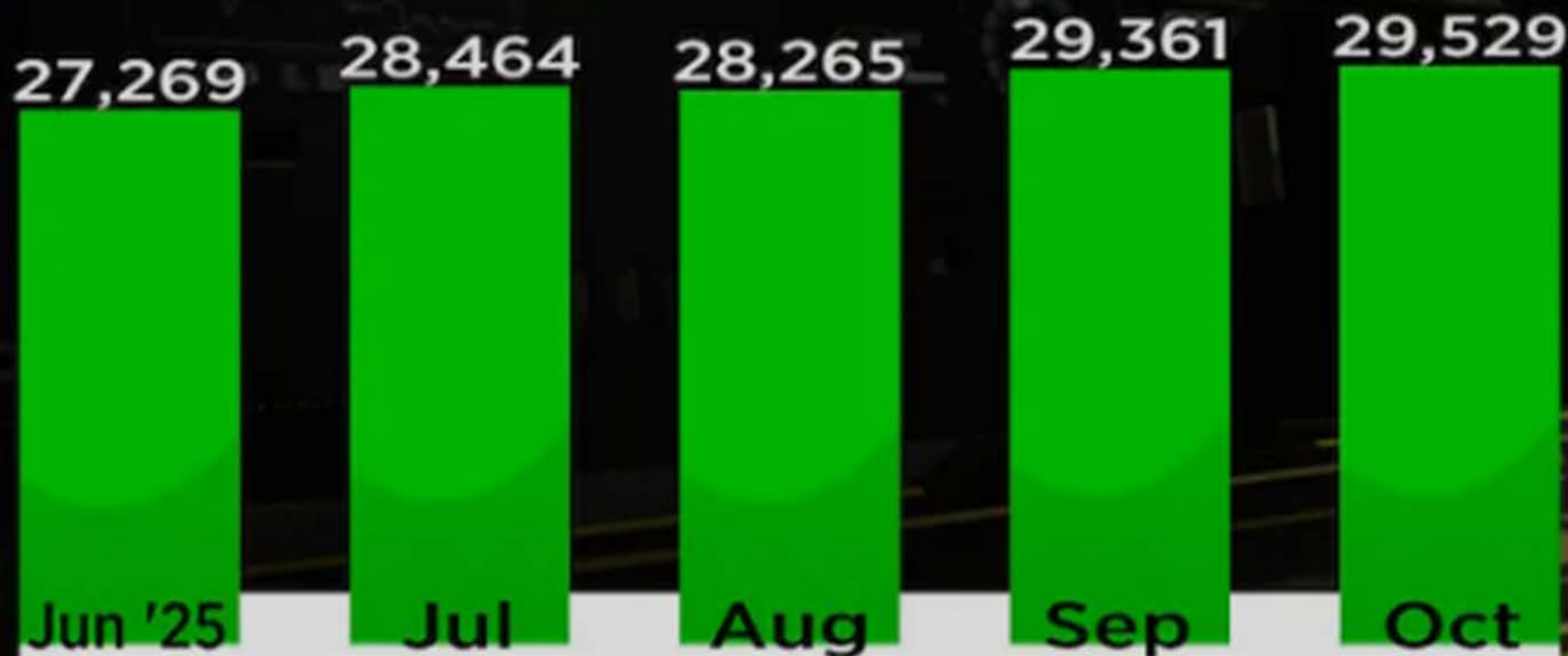
Period	Net Flows Cr.
Nov 2025	- 17,500
Oct 2025	- 2,346
Sep 2025	- 35,301
Aug 2025	- 46,902
July 2025	- 47,666
June 2025	+7488
May 2025	+ 11,773
Apr 2025	+ 2735
Mar 2025	+ 2014
Feb 2025	- 58,988
Jan 2025	- 87,374
Dec 2024	- 16,982
Nov 2024	- 45,974
Oct 2024	- 1,14,445

SIP Flows

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THE MF REPORT CARD

SIP Contribution (₹ Cr)



Near Term View

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- US India Trade Deal crucial for markets to bring back momentum
- Will continue to be stock pickers market

Events To Watch

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- US Trade tariffs
- IPO Market

Thank You