

[Nifty / Sensex indicates positive Opening](#)

Opening Bell – August 12, 2025

Market Opening Outlook: Nifty Signals Rebound

- **Niftys** trading at 50 points (0.19%) higher, suggesting a green opening for the Nifty 50.
- This comes after a sharp sell-off on August 8, where the Nifty 50 fell 232.85 points to close at 24,363.30, and the Sensex dropped 765.47 points to 79,857.79, marking their sixth consecutive weekly decline.

Institutional Flows: DIIs Step Up as FPIs Retreat

- On August 8, FPIs bought ₹1,932.81 crore, while DIIs were net buyers of ₹7,723.66 crore, showing strong domestic support.
- However, FPIs have sold ₹14,018.87 crore in August so far, following ₹47,666.68 crore of outflows in July.
- DIIs have ramped up buying amid tariff tensions, with daily inflows jumping 148% since July 30, averaging over ₹6,100 crore per day.

Global Markets: Mixed Signals Amid Trade Truce Extension

- Asian markets traded mixed:
 - Nikkei 225 surged 1.9% on strong earnings and easing US-Japan tariff tensions.
 - Hang Seng, Shanghai Composite, and ASX 200 declined amid broader uncertainty.
- On Wall Street, major indices closed higher:
- Nasdaq Composite hit a record high at 21,450.02, up 0.98%.
- S&P 500 rose 0.78% to 6,389.45, nearing another milestone.
- Dow Jones gained 0.47% to 44,175.61, boosted by a 13% rally in Apple over the week.

USCN Geopolitics: US-China Trade Truce Extended

- President Trump extended the US-China trade truce by 90 days, averting a tariff spike from 30% to 145% on Chinese goods.
- This move was welcomed by markets and may pave the way for a Trump-Xi summit later this year.

usIN Domestic Pressure: Trump's Tariff Hike on Indian Goods

- On August 6, Trump doubled tariffs on Indian goods to 50%, citing India's continued purchase of Russian oil.

- India called the move “unfair and unjustified,” and exporters warn of a 30–35% competitive disadvantage.
- Sectors like pharmaceuticals, textiles, and machinery are expected to be hit hardest.

Sectoral Impact: Broad-Based Sell-Off

- On August 8, all sectoral indices closed in the red, with realty, consumer durables, metals, and auto leading the decline.
- The Nifty Midcap 100 fell 1.64%, and the Smallcap 100 dropped 1.5%, reflecting widespread caution.

Technical Outlook: Nifty at Crossroads

- Nifty has formed a tweezer bottom and a bullish Marubozu pattern, suggesting potential reversal.
- Key support: 24,340–24,400; Resistance: 24,600–24,750.
- Analysts expect a pullback, but caution that sentiment remains fragile amid macro headwinds.