

GIFT Nifty suggests flat opening for key indices; Bank of Japan kicks off its monetary policy meeting**Morning Market Snapshot – 18 Dec 2025 (Thursday)**

- Nifty:Nifty December 2025 futures were up 6.50 points, indicating a flat opening for the Nifty 50 today.
- Institutional Flows:Foreign portfolio investors (FPIs) bought shares worth Rs 1,171.71 crore, while domestic institutional investors (DIIs) were net buyers to the tune of Rs 768.94 crore in the Indian equity market on 17 December 2025, provisional data showed.
- The FIIs have sold shares worth Rs 22,284.04 crore so far in December. This follows their cash sales of Rs 17,500.31 crore in November and Rs 2,346.89 crore in October.
- Global Markets:Asia markets edged lower on Thursday as investors on Wall Street continued to rotate out of tech.
- Artificial intelligence-related stocks dragged indexes after a media report stated that Oracle's primary investor, Blue Owl Capital, has pulled out from funding one of its data center projects.
- Over in Asia, the Bank of Japan will kick off its two-day meeting, with the central bank expected to raise rates to 0.75% Friday, its highest level in 30 years.
- Overnight in the U.S., all three major indexes fell, with the S&P 500 down 1.16%, and the Nasdaq Composite seeing the largest loss of 1.81%. The Dow Jones Industrial Average slipped 0.47%.
- Traders are awaiting the release of the U.S. consumer price index reading for November, due Thursday morning. It will mark the first consumer inflation report issued to the public since the government shutdown ended last month. Media reports stated that the headline inflation is expected to have grown at a pace of 3.1% on a year-over-year basis.
- Domestic Market:The headline equity indices ended with marginal losses on Wednesday, extending their decline to a third straight session. Sentiment stayed cautious amid continued FII selling and the absence of clear progress on a potential U.S.-India trade deal.
- Global cues were mixed, with rising Japanese bond yields signalling tighter liquidity and weighing on equity valuations. Meanwhile, softer U.S. labour data has raised recession worries while reinforcing expectations of a more accommodative Federal Reserve.
- The Nifty closed below the 25,850 level, dragged by consumer durables stocks, even as PSU banks, metals and IT shares saw selective buying interest.

- The S&P BSE Sensex fell 120.21 points or 0.14% to 84,559.65. The Nifty 50 index lost 41.55 points or 0.16% to 25,818.55. In three consecutive trading sessions, the Sensex slipped 0.83% while the Nifty declined 0.87%..

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