



HSBC Mutual Fund

# Market Flash

June 9, 2025





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### Sensex gains 300 points, Nifty aims 25,100 mark; Nifty Bank hits record high

Indian stock markets opened higher on Monday (June 9, 2025), tracking positive global cues as the US and China are scheduled to hold trade talks in London today.

The Indian Rupee traded slightly lower on Monday (June 9, 2025) amid a weak dollar, as traders navigate through the surprise rate cuts by the Reserve Bank of India (RBI). The domestic currency depreciated 2 paise to open at 85.66 after closing at 85.64 on Friday.

At 9:45 AM, the frontline BSE Sensex was trading at 82,488 up 300 points or 0.36%. Market breadth is positive with in and out of a total of 3,460 shares traded on the Bombay Stock Exchange, 2,459 advanced while 827 declined and 174 remained unchanged. The broader Nifty50 was at 25,093 levels up 90 points or 0.36%.

In the broader markets, the Nifty Mid Cap and the Nifty Small Cap indices were at trading 0.54% and 0.6% higher, respectively.

Among sectors, the Nifty Bank index hit a record high today, up 0.5%. The index surpassed the 57,000-mark to hit an all-time high of 57,049.50.

That apart, the Nifty PSU Bank index was up 1%, the Nifty IT, and Auto 0.8% each, and the Nifty Private Bank index 0.5%.

### WEEKLY REVIEW – JUNE 2, 2025 – JUNE 6, 2025

The key equity indices posted significant gains this week, driven by the Reserve Bank of India's surprise 50 basis points rate cut and a shift in its monetary policy stance from accommodative to neutral. The easing inflation outlook and strong Q4 FY25 GDP growth of 7.4% boosted investor confidence, signaling a stable and supportive economic environment. The Nifty reclaimed the psychological 25,000 mark.

Broader markets outperformed, reflecting renewed optimism around domestic demand and lower borrowing costs. Despite global headwinds and geopolitical concerns, sentiment remained upbeat as macroeconomic indicators pointed toward a healthy growth-inflation balance.

On the sectoral front, Nifty Realty gains more than 9% for the week, becomes the top performing sector for the week. Nifty Realty, Financial Services, Nifty Bank, PSU Banks gains for the fourth consecutive week. Nifty Metal gains more than 2% for the week, gains for the third consecutive day. Nifty Auto, IT, FMCG snaps two week losing streak.

In the week ended on Friday, 6 June 2025, the BSE Sensex surged 737.98 points or 0.90% to settle at 82,188.99. The Nifty 50 index jumped 252.35 points or 1.01% to settle at 25,003.05. The BSE Mid Cap index rallied 2.12% to close at 46,096.51. The BSE Small Cap soared 1.95% to end at 53,440.26.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>Domestic</b>				
S&P BSE Sensex	82,188.99	0.92	1.92	5.18
Nifty 50	25,003.05	1.02	2.56	5.74
S&P BSE 200	11,382.05	1.02	4.04	4.13
S&P BSE 500	36,338.97	0.99	5.18	3.27
S&P BSE Midcap	46,096.51	0.91	8.74	-0.75
S&P BSE Smallcap	53,440.26	0.43	14.1	-3.15
S&P BSE Auto	53,094.15	1.5	4.31	2.77
S&P BSE Bankex	63,556.36	1.25	3.24	10.07
S&P BSE Cap Goods	70,797.70	-0.3	13.97	4.45
S&P BSE Consumer Durables	58,399.68	1.3	3.86	-9.37
S&P BSE FMCG	20,474.63	0.19	-0.63	-1.43
S&P BSE Healthcare	43,222.41	0.4	2.88	-4.54
S&P BSE IT	36,836.56	0.41	4.78	-14.71
S&P BSE Metal	31,268.27	1.56	8.76	8.22
S&P BSE Oil & Gas	27,079.74	0.76	1.7	3.89
S&P BSE Power	6,821.34	0.78	4.93	-2.07
S&P BSE Realty	8,069.29	4.74	21.71	-2

## GLOBAL MARKETS

Shares jumped and the dollar pared recent gains on Monday as Asian markets reacted to better-than-expected US jobs data ahead of talks in London aimed at mending a trade rift between the United States and China.

Wall Street stocks had closed sharply higher on Friday after the jobs data eased concerns about damage to the world's biggest economy from President's unpredictable tariff regime. Safe-haven assets such as gold remained lower after steep selloffs.

US employers added 139,000 jobs in May, data showed on Friday, fewer than the 147,000 jobs added in April. The dollar slid 0.3% against the yen to 144.39, trimming its 0.9% jump on Friday. The European single currency was up 0.2% on the day at \$1.1422.

MSCI's broadest index of Asia-Pacific shares outside Japan was up 0.5% in early trade on Monday. Hong Kong's Hang Seng Index surged 1.3%, touching the 24,000-point level for the first time since March 21. Japan's Nikkei stock index rose 0.9%.



## RUPEE, OIL, GOLD & FIIs

**Indian Rupee:** The rupee pared initial losses and appreciated 11 paise to close at 85.68 (provisional) against the US dollar on Friday, after the Reserve Bank cut repo rate by a higher-than-expected 50 basis points to prop up growth.

**Crude Oil:** Oil prices held on to last week's gains early on Monday as investors waited for US-China trade talks to be held in London later in the day.

Brent crude futures were flat at US\$66.47 a barrel. US West Texas Intermediate crude was trading up one cent at US\$64.59.

**FPIs & DIIs:** Foreign Institutional Investors (FIIs) remained net sellers, offloading Rs 3,565 crore in equities. However, strong domestic institutional flows offset the pressure, as domestic institutional investors (DIIs) infused Rs 25,513 crore into the cash segment, providing solid support to the broader market.

**Gold:** Gold prices declined on Monday as optimism over easing US-China trade tensions dampened safe-haven demand, while a stronger-than-expected U.S. jobs report tempered expectations of interest rate cuts by the Federal Reserve.

Spot gold fell 0.4% to \$3,298.12 an ounce. US gold futures lost 0.9% to \$3,317.40.



International				
DJIA*	42,319.74	-0.25	2.67	-0.53
Nasdaq Composite*	19,298.45	-0.83	8.15	-0.06
Nikkei 225 (Japan)	37,741.61	0.5	2.47	-5.4
Straits Times (Singapore)	3,934.29	0.42	1.91	3.87
Hang Seng (Hong Kong)	23,792.54	-0.48	4.99	18.61
Kospi Composite (Seoul)	Closed	NA	NA	0
FTSE 100 (London)	8,811.04	0.11	2.5	7.81
Cac 40 (France)*	7,790.27	-0.18	0.81	5.55
Xetra Dax (Germany)*	24,323.58	0.19	5.36	22.17
S&P 500 (US)*	5,939.30	-0.53	4.44	0.98
Shanghai (china)	3,385.36	0.04	2.09	1
MICEX (Russia)*	2,795.29	0.25	-0.88	-3.04
Bovespa (Brazil)*	1,36,236.00	-0.56	2.06	13.26
JCI (Indonesia)	Closed	NA	NA	0
SET (Thailand)	1,136.43	-0.37	-4.33	-18.84

**\*Data as of Jun 5**

#### FII equity investments, Rs cr

	Buy	Sell	Net	MTD
05-Jun	18,265.00	18,215.00	50	-3,746.00
May-25	3,61,096.18	3,46,413.08	14,683.10	
Apr-25	3,18,326.36	3,13,929.66	4,396.70	
Mar-25	2,98,911.92	2,90,858.48	8,053.44	
Feb-25	2,97,314.60	3,43,915.00	-46,600.40	
Jan-25	2,51,530.65	3,24,206.54	-72,675.89	
Dec-24	3,28,550.47	3,17,464.70	11,085.77	
Last Close	17,867.00	16,262.00	1,605.00	
6 Months average	3,09,288.36	3,22,797.91	-13,509.55	

#### MF equity investments, Rs cr

	Buy	Sell	Net	MTD
05-Jun	7,742.00	6,219.00	1,523.00	9,531.00*
May-25	233615	177312.92	56302.08	
Apr-25	212481.74	195438.37	17043.37	
Mar-25	202659.75	196742.88	5916.87	
Feb-25	226200.32	178266.51	47933.81	
Jan-25	259968.35	204678.3	55290.05	
Dec-24	238343.12	210205.34	28137.78	
Last Close	11,895.00	7,617.00	4,278.00	
6 Months average	2,28,878.05	1,93,774.05	35,103.99	

**-MF data as of Jun 4**

## WEEK AHEAD

Market heads into the new week riding high on the RBI's unexpectedly bold move, a 50 basis point rate cut. Strong macroeconomic indicators, solid corporate earnings, and forecasts of an above-normal monsoon season may contribute positively to market sentiment.

### Domestic Cues:

India's retail inflation data for May will release on Thursday, 12 June 2025.

India's trade data for May will release on Friday, 13 June 2025.

### Global Cues:

China's inflation and trade data for May will release on Monday, 9 June 2025.

US inflation data for May will release on Wednesday, 11 June 2025.

US producer price index (PPI) data for May will release on Thursday, 12 June 2025.

US preliminary Michigan consumer sentiment data for June will release on Friday, 13 June 2025.

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**Source:** Bloomberg, Capital Market, MOSL & HSBC MF estimates as on June 9, 2025 or as latest available.

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