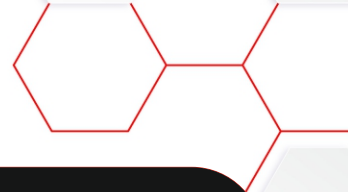


Market Flash

May 05, 2025





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Sensex gains over 500 points, Nifty at 24,500 mark; Auto, FMCG rise

Indian benchmark equity indices opened higher today, amid mixed global cues. At opening bell, the BSE Sensex was higher by 320.12 points at 80,822.11, and the Nifty50 was at 24,437.20, higher by 90.50 points.

The Indian rupee rose 11 paise against the US dollar at 84.45 a dollar on Monday, erasing a day's loss.

At 10:45 AM, the frontline BSE Sensex was trading at 81,018 up 516 points or 0.64%. Market breadth is positive with and out of a total of 3,317 shares traded on the Bombay Stock Exchange, 1,959 advanced while 1,169 declined and 189 remained unchanged. The broader Nifty50 was at 24,515 levels up 169 points or 0.69%.

Except for bank and media, all other sectors including auto, energy, FMCG, IT, metal, pharma, realty opened in green. In the broader markets, the BSE Mid Cap index was up 0.45% at opening and BSE Small Cap was up 0.15%.

WEEKLY REVIEW – APRIL 28, 2025 – MAY 2, 2025

The benchmark indices ended truncated week with strong gains, supported by robust corporate earnings and series of positive domestic data. Looking ahead, investors will remain focused on geopolitical developments, ongoing tariff disputes, and overall market trends.

In the week ended on Friday, 2 May 2025, the BSE Sensex jumped 1,289.46 points or 1.63% to settle at 80,501.99. The Nifty50 index added 307.35 points or 1.28% to settle at 24,346.70. The BSE Mid Cap index rose 0.42% to close at 42,707.87. The BSE Small Cap index fell 1.33% to end at 47,365.54.

India's foreign exchange reserves rose by \$1.983 billion to \$688.129 billion in the week that ended on April 25, extending gains for the eighth straight week, RBI data showed.

Indices	Last close	One-day change in %	One month change in %	% YTD change in %
Domestic				
S&P BSE Sensex	80,501.99	0.32	5.07	3.02
Nifty 50	24,346.70	0.05	4.35	2.97
S&P BSE 200	10,954.90	-0.03	3.82	0.22
S&P BSE 500	34,623.50	-0.05	3.48	-1.61
S&P BSE Midcap	42,707.87	-0.41	2.5	-8.05
S&P BSE Smallcap	47,365.54	-0.07	0.49	-14.16
S&P BSE Auto	49,926.08	-0.07	4.1	-3.36
S&P BSE Bankex	62,709.23	0.14	6.02	8.6
S&P BSE Cap Goods	62,668.31	-0.18	1.25	-7.54
S&P BSE Consumer Durables	56,500.43	-1.66	3.85	-12.32
S&P BSE FMCG	20,408.52	-0.22	4.56	-1.75
S&P BSE Healthcare	41,995.12	-0.51	2.12	-7.25
S&P BSE IT	35,207.21	0.45	-1.22	-18.48
S&P BSE Metal	28,871.06	-0.62	-5.89	-0.07
S&P BSE Oil & Gas	26,675.00	0.69	5.18	2.34
S&P BSE Power	6,583.47	-0.96	0.67	-5.49
S&P BSE Realty	6,826.23	-0.56	2.93	-17.1

GLOBAL MARKETS

Asian markets saw muted openings amid holidays in some of the biggest markets, while the US stock market ended higher last week, with the S&P 500 and Dow Jones posting ninth consecutive sessions of gains.

Most Asian markets are closed for holidays, while Australian markets fell in early trade Monday after their Prime Minister was reelected to power.

The benchmark S&P/ASX 200 fell 0.29%, and the Australian dollar depreciated marginally by 0.06% against the US dollar to trade at 0.6439. Japanese, South Korean, Hong Kong and Chinese markets are closed for public holidays.

US stock market ended higher on Friday, notching the second straight week of gains, helped by strong economic data and potential easing of trade tensions between the US and China.



The Dow Jones Industrial Average rallied 564.47 points, or 1.39%, to 41,317.43, while the S&P 500 gained 82.54 points, or 1.47%, to 5,686.68. The Nasdaq Composite closed 266.99 points, or 1.51%, higher at 17,977.73. For the week, the S&P 500 gained 2.9%, the Dow climbed 3%, and the Nasdaq added 3.43%.

RUPEE, OIL & FIIs

Indian Rupee: The currency fell seven paise to 84.30 against the US dollar at close on Friday, erasing a day's gains after closing 74 paise stronger against the US dollar on Wednesday at 84.49.

However, the local tender had crossed the 84-a-dollar mark and strengthened 74 paise a dollar to reach a seven-month intraday high at 83.75 on Friday.

Crude Oil: Oil buckled on concerns of a global glut after OPEC+ agreed to another bumper output increase, adding to supply at a time when demand is challenged by the drag from the trade war.

Global benchmark Brent tumbled by as much as 4.6% toward \$58 a barrel as the week's trading kicked off, while West Texas Intermediate was near \$56. The decision by OPEC and its allies was taken at a meeting on Saturday, with the group's leaders seeking to punish overproducing members including Kazakhstan in a strategy shift that had already sent prices plunging.

FPIs & DIIs: Foreign Portfolio Investors (FPIs) have injected Rs 4,223 crore in the Indian stock market in April as they turned net buyers for the first time in three months amid a blend of favourable global cues and robust domestic fundamentals.

Foreign institutional investors (FIIs) and domestic institutional investors (DIIs) remained net buyers during the week, with net purchases of Rs 10,071 crore and Rs 9,270 crore, respectively.



International				
DJIA*	40,752.96	0.21	-2.95	-4.21
Nasdaq Composite*	17,710.74	1.52	1.49	-8.29
Nikkei 225 (Japan)	36,830.69	1.04	3.09	-7.68
Straits Times (Singapore)	3,845.14	0.33	-2.76	1.52
Hang Seng (Hong Kong)	22,504.68	1.74	-3.01	12.19
Kospi Composite (Seoul)	2,559.79	0.12	2.15	6.68
FTSE 100 (London)	8,496.80	0.02	-1.6	3.96
Cac 40 (France)*	Closed	NA	NA	0
Xetra Dax (Germany)*	Closed	NA	NA	0
S&P 500 (US)*	5,604.14	0.63	-0.51	-4.72
Shanghai (china)	Closed	NA	NA	0
MICEX (Russia)*	2,860.56	-1.98	-2.25	-5.46
Bovespa (Brazil)*	Closed	NA	NA	0
JCI (Indonesia)	6,815.73	0.72	4.69	-5.1
SET (Thailand)	1,198.98	0.14	2.1	-10.71

***Data as of May 1**

FII equity investments, Rs cr

	Buy	Sell	Net	MTD
30-Apr	25,357.00	25,184.00	173	4,397.00
Apr-25	0	0	0	
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	
Nov-24	3,59,106.71	3,81,708.83	-22,602.12	
Last Close	15,694.00	13,343.00	2,351.00	
6 Months average	2,55,902.39	2,76,358.93	-20,456.53	

MF equity investments, Rs cr

	Buy	Sell	Net	MTD
30-Apr	10,012.00	8,909.00	1,103.00	15,030.00*
Apr-25	0	0	0	
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	
Nov-24	184871.96	149239.4	35632.56	
Last Close	11,796.00	8,488.00	3,308.00	
6 Months average	1,85,340.58	1,56,522.07	28,818.51	

-MF data as of Apr 29

WEEK AHEAD

The domestic equity market is expected to remain cautious this week as investors weigh ongoing geopolitical tensions between India and Pakistan. Market sentiment is likely to remain fragile amid uncertainty on the diplomatic front, with traders adopting a wait-and-watch approach.

Looking ahead, the Q4FY25 earnings season is expected to be a key driver of market direction. Corporate performance, alongside geopolitical developments, will likely guide investor sentiment in the days to come.

HSBC Composite PMI data (Final) for April will release on Tuesday, 6 May 2025.

HSBC Services PMI data (Final) for April will release on Tuesday, 6 May 2025.

Global Cues:

United States ISM Services PMI data for April will release on Monday, 5 May 2025.

The U.S. Federal Open Market Committee (FOMC) will announce its interest rate decision on Wednesday, 7 May 2025.

China's balance of trade data for April is due on Friday, 9 May 2025.

Source: Bloomberg, BSE, HSBC MF, CRISIL, Capital Market

Views provided above are based on information in public domain and subject to change. Investors are requested to consult their financial advisor for any investment decisions.

Source: Bloomberg, Capital Market, MOSL & HSBC MF estimates as on May 5, 2025 or as latest available.

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