



HSBC Mutual Fund

# Market Flash

June 16, 2025





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### Markets trade choppy, Nifty Small Cap index dips 1.5%

Indian markets are trading choppy on Monday, June 16, as investors monitor the rising tensions in West Asia. Commodity prices, especially oil, have been rising as Israel and Iran attacked nuclear sites and oil infrastructures.

At 9:55 AM, the frontline BSE Sensex was trading at 81,179 up 60 points or 0.07%. Market breadth is negative with and out of a total of 3,371 shares traded on the Bombay Stock Exchange, 897 advanced while 2,295 declined and 179 remained unchanged. The broader Nifty50 was at 24,727 levels up 9 points or 0.04%.

In the broader markets, the Nifty Mid Cap index falls 0.83%, while the Nifty Small Cap index dips 1.5%.

Among sectors, the Nifty IT was the top gainer, up 0.43%, while the Nifty PSU Bank index was the top loser, down 0.4%.

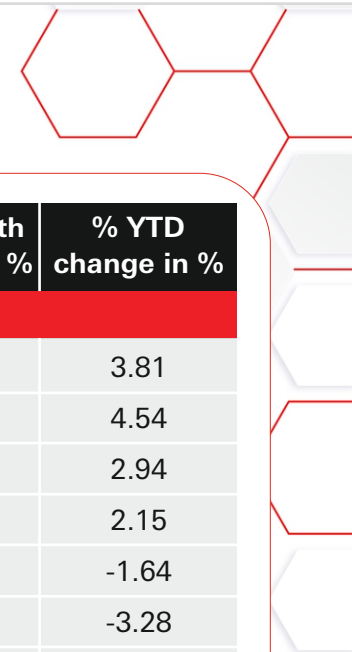
### WEEKLY REVIEW – JUNE 9, 2025 – JUNE 13, 2025

The key equity indices posted sharp losses during the week, weighed down by geopolitical tensions, including the ongoing US-China trade talks and escalating hostilities between the US and Iran. Sentiment further deteriorated after Israel carried out military strikes on Iran, heightening tensions in the oil-rich Middle East.

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. The Nifty50 ended below 24,750 mark. The broader market outperformed the frontline indices.

On the sectoral front, most indices ended in negative territory. Capital Goods, Metals, Realty, FMCG, and Bank Nifty were among the biggest losers, falling between 1.5 - 4%. On the other hand, IT surged over 3% followed by Pharma and Oil & Gas sectors which posted modest gains.

In the week ended on Friday, 13 June 2025, the BSE Sensex declined 1,070.39 points or 1.30% to settle at 81,118.60. The Nifty 50 index tumbled 284.45 points or 1.14% to settle at 24,718.60. The BSE Mid Cap index shed 0.90% to close at 45,681.28. The BSE Small Cap fell 0.13% to end at 53,370.29.



Indices	Last close	One-day change in %	One month change in %	% YTD change in %
<b>Domestic</b>				
S&P BSE Sensex	81,118.60	-0.7	-0.04	3.81
Nifty 50	24,718.60	-0.68	0.57	4.54
S&P BSE 200	11,252.01	-0.61	1.45	2.94
S&P BSE 500	35,946.69	-0.57	2.28	2.15
S&P BSE Midcap	45,681.28	-0.32	4.28	-1.64
S&P BSE Smallcap	53,370.29	-0.3	8.53	-3.28
S&P BSE Auto	52,323.67	-0.33	0.81	1.28
S&P BSE Bankex	62,570.44	-1.01	-0.02	8.36
S&P BSE Cap Goods	69,767.45	-0.01	5.78	2.93
S&P BSE Consumer Durables	57,110.34	-0.49	-2.42	-11.37
S&P BSE FMCG	20,065.88	-0.94	-2.18	-3.4
S&P BSE Healthcare	43,995.31	0.08	4.75	-2.83
S&P BSE IT	37,839.04	-0.09	3.11	-12.38
S&P BSE Metal	30,747.36	-0.81	3.06	6.42
S&P BSE Oil & Gas	27,162.24	-0.57	2.16	4.21
S&P BSE Power	6,725.34	-0.75	1.76	-3.45
S&P BSE Realty	7,820.91	0.13	16.5	-5.02

## GLOBAL MARKETS

Asian stock markets started the trading week with a largely positive tone on Monday, though investors remained on high alert, carefully assessing the escalating tensions between Israel and Iran alongside a fresh batch of economic data from China.

While the geopolitical situation fueled a jump in oil prices, most regional equity indices managed to find some upward momentum. Indian benchmarks, including the Sensex, are also in sharp focus.

The weekend saw a continuation of hostilities between Israel and Iran, with both sides exchanging strikes.

This volatile backdrop sent oil prices higher and saw gold rally as investors sought refuge in traditional safe-haven assets while global equity markets had previously slid.

Mainland China's CSI 300 index and Hong Kong's Hang Seng Index were both reported to be flat in choppy early trade.

Elsewhere in the region, Japan's benchmark Nikkei 225 climbed a solid 0.96%, while the broader Topix index advanced 0.58%.

In South Korea, the Kospi index gained 0.62%, and the small-cap Kosdaq moved up 0.36%, also experiencing some volatility.

Australia's S&P/ASX 200 increased by 0.26%.

US equity futures moved up during early Asian trading hours, suggesting some stabilization after a sharp sell-off on Wall Street last Friday.

On Friday, the Dow Jones Industrial Average had fallen 769.83 points, or 1.79%, to end at 42,197.79. The S&P 500 dropped 1.13% to close at 5,976.97, while the Nasdaq Composite lost 1.30% to settle at 19,406.83.

## **RUPEE, OIL, GOLD & FIIs**

**Indian Rupee:** The rupee plummeted 55 paise to 86.07 (provisional) against the US dollar on Friday due to a spike in global oil prices and a firm dollar amid rising tensions in the Middle East following Israel's attack on Iran's nuclear sites.

**Crude Oil:** Crude oil prices soared as much as 5 per cent on Monday as Israel and Iran continued attacks over the weekend. Israel launched 'Operation Rising Lion' against Iran Friday morning, attacking its nuclear facilities amid escalating tensions between the two West Asian countries.

Brent crude price was up 0.84% to \$74.85 per barrel, while WTI crude prices were higher by 1.03% at 73.73.

**FPIs & DIIs:** In the week ended June 13, the FIIs offloaded Rs 1,246 crore amount of equities, while domestic institutional investors (DIIs) continued their buying streak with net purchases totaling Rs 18,637 crore.

FIIs recorded net selling on three out of five sessions, led by an outflow of Rs 3,831 crore on June 12 — the highest daily withdrawal during the week.

In contrast, DIIs stepped up support for the markets, posting strong net inflows each day of the week. The largest was seen on June 12 at Rs 9,394 crore, followed by Rs 3,504 crore on June 9.

**Gold:** Gold rose for a fourth straight session to a near two-month high on Monday, as intensified clashes between Israel and Iran over the weekend stoked fears of a broader regional conflict, pushing investors towards safe-haven assets.

Spot gold gained 0.3% to \$3,442.09 an ounce, after hitting its highest level since April 22 earlier in the session.



International				
DJIA*	42,967.62	0.24	1.31	1
Nasdaq Composite*	19,662.49	0.24	5.1	1.82
Nikkei 225 (Japan)	37,834.25	-0.89	-0.91	-5.16
Straits Times (Singapore)	3,911.42	-0.27	0.78	3.27
Hang Seng (Hong Kong)	23,892.56	-0.59	3.39	19.11
Kospi Composite (Seoul)	2,894.62	-0.87	10.97	20.63
FTSE 100 (London)	8,884.92	0.23	3.25	8.71
Cac 40 (France)*	7,765.11	-0.14	-1.08	5.21
Xetra Dax (Germany)*	23,771.45	-0.74	0.87	19.4
S&P 500 (US)*	6,045.26	0.38	3.44	2.78
Shanghai (china)	3,377.00	-0.75	0.06	0.75
MICEX (Russia)*	2,754.65	0.78	-6.16	-4.45
Bovespa (Brazil)*	1,37,800.00	0.49	0.91	14.56
JCI (Indonesia)	7,166.07	-0.53	4.88	1.22
SET (Thailand)	1,122.70	-0.52	-7.55	-19.82

**\*Data as of Jun 12**

**FII equity investments, Rs cr**

	Buy	Sell	Net	MTD
12-Jun	18,265.00	18,215.00	50	-398
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	15,628.00	15,759.00	-131	
6 Months average	3,09,288.36	3,22,797.91	-13,509.55	

**MF equity investments, Rs cr**

	Buy	Sell	Net	MTD
12-Jun	7,742.00	6,219.00	1,523.00	19,380.00*
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	10,101.00	9,500.00	601	
6 Months average	2,28,878.05	1,93,774.05	35,103.99	

**-MF data as of Jun 4**

## WEEK AHEAD

The coming week may keep Indian equities under pressure, with sentiment fragile amid escalating tensions between Israel and Iran. Brent crude has already surged to \$78 per barrel, and further escalation could send prices soaring even higher.

India's WPI inflation data for May will be released on Monday, 16 June 2025.

On Friday, 20 June 2025, the RBI will release the minutes of its recent monetary policy meeting, along with infrastructure output data for May.

Global Cues:

China's industrial production and retail sales data will release on Monday, 16 June 2025.

Japan's central bank will announce its interest rate decision on Tuesday, 17 June 2025.

The US will release its retail sales month-on-month data for May on Tuesday, 17 June 2025.

Japan's balance of trade data for May will be released on Wednesday, 18 June 2025.

The US will publish its building permits and housing starts data for May on Wednesday, 18 June 2025.

The US Federal Reserve will announce its interest rate decision and FOMC economic projections on Wednesday, 18 June 2025.

The US Fed Chair will hold a press conference on Thursday, 19 June 2025.

Japan's inflation rate for May will be released on Friday, 20 June 2025.

**Source:** Bloomberg, Capital Market, MOSL & HSBC MF estimates as on June 16, 2025 or as latest available.

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