

Market Flash

June 30, 2025





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Sensex falls 250 points, Nifty below 25,600; Midcaps & Smallcap outperform

Stock markets in India opened on a muted note on Monday as investors tracked global cues for market movement amid no domestic triggers. The domestic currency opened at 85.47 against Friday's close of 85.48.

At 10:35 AM, the frontline BSE Sensex was trading at 83,805 down 259 points or 0.30%. Market breadth is positive with and out of a total of 3,876 shares traded on the Bombay Stock Exchange, 2,285 advanced while 1,359 declined and 232 remained unchanged. The broader Nifty50 was at 25,567 levels down 71 points or 0.28%.

In the broader market, the Nifty Mid Cap and the Nifty Small Cap indices were outperforming. The former was up 0.36% and the latter was higher by 0.49 per cent. India VIX was up 3.5%.

Among sectors, the Nifty PSU Bank index was the top gainer (up 1.48%), while the Nifty Auto index was the top loser (down 0.33%).

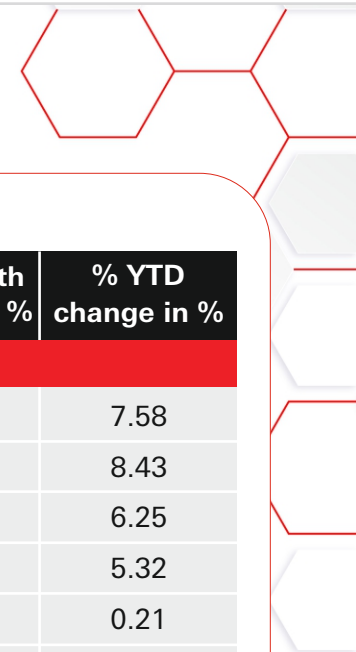
WEEKLY REVIEW – JUNE 23, 2025 – JUNE 27, 2025

The headline equity benchmarks saw a strong rebound last week, closing in the green for four out of five sessions. Supported by easing geopolitical tensions, strong global cues, positive domestic economic data and robust FII buying, Monday (July 23) was the only negative day, as investor sentiment was rattled by US airstrikes on Iranian nuclear sites, sparking fears of a broader Middle East conflict.

However, from Tuesday (July 24) onward, markets gained for four straight sessions, buoyed by news of a tentative ceasefire between Iran and Israel and strong FII inflows. Upbeat India PMI data further boosted sentiment. Additionally, several SME and mainboard IPOs launched during the week helped increase market liquidity and investor participation.

On the sectoral front, auto and financial stocks were the key drags on the benchmarks, with the Nifty Auto index slipping 0.4% and Nifty Financial Services edging down 0.1%.

In the week ended on Friday, 27 June 2025, the BSE Sensex surged 1,650.73 points or 2% to settle at 84,058.90. The NSE Nifty50 index soared 525.40 points or 2.09% to settle at 25,637.80. The BSE Mid Cap index jumped 2.33% to close at 46541.25. The BSE Small Cap index zoomed 3.57% to end at 54,249.40.



Indices	Last close	One-day change in %	One month change in %	% YTD change in %
Domestic				
S&P BSE Sensex	84,058.90	0.36	3.07	7.58
Nifty 50	25,637.80	0.35	3.27	8.43
S&P BSE 200	11,614.10	0.44	3.02	6.25
S&P BSE 500	37,060.93	0.45	3.31	5.32
S&P BSE Midcap	46,541.25	0.38	2.99	0.21
S&P BSE Smallcap	54,249.40	0.54	4.6	-1.69
S&P BSE Auto	53,758.90	0.3	1.55	4.06
S&P BSE Bankex	64,556.02	0.39	2.87	11.8
S&P BSE Cap Goods	71,548.78	0.83	1.97	5.56
S&P BSE Consumer Durables	59,533.77	0.4	1.33	-7.61
S&P BSE FMCG	20,293.15	0.14	-1.91	-2.3
S&P BSE Healthcare	44,014.70	0.69	3.16	-2.79
S&P BSE IT	38,060.14	-0.24	2.79	-11.87
S&P BSE Metal	31,850.65	0.37	2	10.24
S&P BSE Oil & Gas	27,919.83	1.21	2.42	7.12
S&P BSE Power	6,929.40	1.14	1.54	-0.52
S&P BSE Realty	7,709.53	-1.57	5.2	-6.37

GLOBAL MARKETS

Asian markets traded higher on Monday as investors analyse details on trade negotiations and key economic data in the region.

Japanese Nikkei 225 rallied 1.68%, while the Topix index gained 0.96%. South Korea's Kospi index advanced 0.85%, while the Kosdaq was flat. Hong Kong's Hang Seng index futures indicated a stronger opening.

US stock market ended higher on Friday, with the S&P 500 and Nasdaq recording their all-time closing highs.

The Dow Jones Industrial Average surged 432.43 points, or 1.00%, to 43,819.27, while the S&P 500 gained 32.05 points, or 0.52%, to 6,173.07. The Nasdaq Composite closed 105.55 points, or 0.52%, higher at 20,273.46. All three major Wall Street indexes posted weekly gains.



RUPEE, OIL, GOLD & FIIs

Indian Rupee: The Indian rupee had its best week since January 2023, as an Iran-Israel ceasefire cooled oil prices and sapped safe-haven dollar demand, while worries over the Federal Reserve's future independence added pressure on the greenback.

The rupee gained 1.3% on the week, its best performance in two and a half years, to close at 85.4750 per U.S. dollar on Friday.

Crude Oil: Oil prices fell on Monday as an easing of geopolitical risks in the Middle East and the prospect of another OPEC+ output hike in August improved supply expectations amid persistent uncertainty over the outlook for global demand.

Brent crude futures fell 13 cents, or 0.19%, to \$67.64 a barrel, ahead of the August contract's expiry later on Monday. The more active September contract was at \$66.62, down 18 cents.

FPIs & DIIs: Domestic institutional investors (DIIs) continued their strong buying streak in Indian equities, with net inflows touching Rs 69,176.47 crore for the month of June as of Friday (June 27) - marking the second-highest monthly inflow by DIIs in 2025 so far.

On Friday, DIIs turned net sellers, pulling out Rs 588.93 crore, according to provisional exchange data. However, this comes after several sessions of robust buying through the month.

Foreign institutional investors (FIIs) were net buyers for the day, infusing Rs 1,397.02 crore into equities. Their month-to-date net buying stands at Rs 8,320.48 crore, indicating a modest but positive return of foreign flows amid global uncertainties.

Gold: Gold prices fell to their lowest in more than a month as easing US-China trade tensions dampened safe-haven demand.

Spot gold price fell 0.3% to \$3,264.64 per ounce, after hitting its lowest level since May 29. US gold futures declined 0.4% to \$3,275.30.



International				
DJIA*	43,386.84	0.94	4.29	1.98
Nasdaq Composite*	20,167.91	0.97	7.64	4.44
Nikkei 225 (Japan)	40,150.79	1.43	6.43	0.64
Straits Times (Singapore)	3,966.20	0.7	1.8	4.72
Hang Seng (Hong Kong)	24,284.15	-0.17	3.86	21.06
Kospi Composite (Seoul)	3,055.94	-0.77	15.88	27.36
FTSE 100 (London)	8,735.60	0.19	0.2	6.88
Cac 40 (France)*	7,557.31	-0.01	-3.46	2.39
Xetra Dax (Germany)*	23,649.30	0.64	-1.57	18.79
S&P 500 (US)*	6,141.02	0.8	5.83	4.41
Shanghai (china)	3,424.23	-0.7	2.5	2.16
MICEX (Russia)*	2,787.12	-0.36	1.84	-3.33
Bovespa (Brazil)*	1,37,114.00	0.99	-0.74	13.99
JCI (Indonesia)	Closed	NA	NA	0
SET (Thailand)	1,082.42	-2.2	-6.96	-22.7

***Data as of Jun 26**

FII equity investments, Rs cr

	Buy	Sell	Net	MTD
26-Jun	29,759.00	19,096.00	10,663.00	13,919.00
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	14,988.00	15,842.00	-854	
6 Months average	3,09,288.36	3,22,797.91	-13,509.55	

MF equity investments, Rs cr

	Buy	Sell	Net	MTD
26-Jun	9,187.00	7,850.00	1,337.00	52,046.00*
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	10,732.00	5,536.00	5,196.00	
6 Months average	2,28,878.05	1,93,774.05	35,103.99	

-MF data as of Jun 25

WEEK AHEAD

Indian equity markets appear poised to begin the week on a cautiously optimistic note. The ceasefire between Israel and Iran has lifted a major geopolitical overhang, nudging global investors back into risk-on mode.

Adding to the cheer, a successful NATO summit and renewed European commitment to defense spending have reassured markets wary of growing US isolationism.

The spotlight has now shifted squarely to the US Federal Reserve and the looming July 9 trade tariff deadline.

Closer to home, foreign institutional investors have resumed their buying spree, which has helped bolster Indian benchmarks.

Domestic Cues

India's Industrial Production (YoY) data for May will be released on Monday, 30 June 2025.

India's Current Account data for Q1 will be released on Monday, 30 June 2025.

India's HSBC Manufacturing PMI Final for June will be released on Tuesday, 1 July 2025.

India's HSBC Composite PMI Final for June will be published on Thursday, 3 July 2025.

India's HSBC Services PMI Final for June will also be released on Thursday, 3 July 2025.

Global Cues

China's NBS Manufacturing PMI for June will be released on Monday, 30 June 2025.

Japan's Tankan Large Manufacturers Index for Q2 will be released on Tuesday, 1 July 2025.

China's Caixin Manufacturing PMI for June will be published on Tuesday, 1 July 2025.

Japan's Consumer Confidence data for June will be released on Tuesday, 1 July 2025.

The United States ISM Manufacturing PMI for June will be released on Tuesday, 1 July 2025.

The United States JOLTs Job Openings data for May will also be released on Tuesday, 1 July 2025.

The United States Non-Farm Payrolls data for June will be published on Thursday, 3 July 2025.

The United States Unemployment Rate for June will also be released on Thursday, 3 July 2025.

The United States ISM Services PMI for June will be announced on Thursday, 3 July 2025.

Source: Bloomberg, Capital Market, MOSL & HSBC MF estimates as on June 30, 2025 or as latest available.

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