

The Week that was

June 20th 2025

" Consumption Powers Ahead: Markets Find Balance Amid Global Headwind"

Indian Developments

During the week ending **20 June 2025**, the **Indian stock market** delivered a **mixed performance** this week, navigating through **global trade tensions, economic uncertainty, and volatile crude oil prices**. The FED's decision maintained a cautious stance, signaling no immediate rate hikes reflecting the signs of stability and resilience of the US economy.

Foreign Institutional Investors (FIIs) recorded a **net inflow of ₹3,308 crore** over the week, while Domestic Institutional Investors (DIIs) continued their **consistent buying streak**, providing crucial support to the markets.

Meanwhile, **Brent crude oil prices**, which had recently surged to a **three-month high**, began to ease. This decline was driven **absence of further escalation in tensions between Iran and Israel**, which had previously fueled supply concerns.

Gold Consolidated after early-week correction; safe-haven demand remains intact.

The Indian Rupee (INR) experienced a modest depreciation against the U.S. Dollar during the week, primarily driven by the strengthening of the dollar, supported by the Federal Reserve's stable monetary policy and resilient U.S. economic indicators.

The **Nifty 50** closed at **25,112**, surging past 25,000 recording **1.59% gains**, while **Nifty Midcap 150** and **Nifty Small cap 250** weakened by **0.69%** (21,285) and **1.71%** (16,916) respectively during the period.

Sectoral Developments

For the week ending **June 20, 2025**, despite choppy sessions, selected sectors showed resilience and led the recovery.

Nifty India Consumption led the market with **2.17% gain** compared to the previous week driven by strong domestic demand and FMCG strength. It was followed by notable performances in Nifty Infrastructure (1.77%) boosted by project financing reforms, Nifty Private Bank (1.64%), Nifty Auto (1.51%), and Nifty IT (1.36%).

On the other end of the spectrum, Nifty Metal, Nifty Pharma, Nifty Energy declined by **1.30%, 1.69% and 0.39%** respectively.

Global Developments

Global equities delivered a mixed performance this week, with Asian markets leading the gains. **South Korea's KOSPI** edged higher by **4.40%**. In contrast, the **Shanghai Composite and Hong Kong's Hang Seng index** registered a **slight decline of 0.07% and 0.94% respectively**.

Major **U.S. stock indices**—including the **S&P 500, Dow Jones Industrial Average, and Nasdaq Composite**—experienced notable declines of 0.69%, 1.62% and 0.62% respectively driven by economic slowdown signals, policy uncertainty, and valuation concerns.

Source: www.nseindices.com; google finance, MCX Gold Prices; www.rbi.org.in; Morningstar and tradingeconomics.com, ccilindia.com, Economic times

Data for week ended on June 20th , 2025.

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In Europe, the **FTSE 100** slipped by **0.28%**, and Germany's **DAX** declined more sharply by **0.77%**, reflecting geopolitical and economic uncertainties.

Other Markets:

- Brent Crude oil prices ended at \$77.24 per barrel.
- The rupee was depreciated to 86.59 levels against the US dollar.
- The 10 Year Benchmark G-Sec yield closed at 6.32% this week.

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Source: www.nseindices.com; google finance, MCX Gold Prices; www.rbi.org.in; Morningstar and tradingeconomics.com, ccilindia.com, Economic times

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