

The Week that was

June 27th 2025

" Markets in Balance: Domestic Buying Counters Global Headwinds"

Indian Developments

For the **week ending June 27, 2025**, stock markets performed strongly, with major indices nearing or surpassing record highs. A **cease-fire between Israel and Iran** helped calm global markets, reducing risk-off sentiment and supporting equity rallies

Foreign Institutional Investors (FIIs) pulled out **₹2,480 crore** over the week, while Domestic Institutional Investors (DIIs) stepped in with **net buying of ₹10,875.56 crore**, providing crucial support.

Rupee ends below 85.5/\$ posted the best week since Jan 2023 as oil prices slide. The currency has depreciated by around 0.1 per cent so far this month. This drop in oil prices has had ripple effects across global markets, benefiting oil-importing countries like India through **lower import bills** and **improved margins for oil marketing companies**.

Gold prices in India witnessed a **sharp decline** this week, reflecting global market uncertainty and easing geopolitical tensions.

The **Nifty 50, Nifty Midcap 150** and **Nifty Small cap 250** upsurged by **2.09%, 2.61% and 4.29% respectively**.

Sectoral Developments

For the week ending **June 27, 2025**, Major Sectors traded in the green mid-week, driven by DI inflow, stable corporate earnings, positive global cues, easing geopolitical tensions, and expectations of favorable macroeconomic data.

Nifty Metal led the market with **4.81% gain** compared to the previous week, driven by easing tariff concerns from the US, weaker DXY. It was followed by notable performances in Nifty Capital Markets (4.75%), Nifty Infrastructure (3.37%), Nifty Oil and Gas (3.25%), Nifty Financial Services (2.61%) and Nifty Energy (2.65%).

On the other end of the spectrum, Nifty IT, Nifty Pharma and Nifty Realty declined by **0.43%, 1.13% and 1.94%** respectively.

Global Developments

The major indexes were coming off a lackluster performance. U.S. economic data showed resilience as GDP growth for Q2 was projected to exceed **3%**, driven by solid consumer spending. The U.S. dollar index, trading at a three-year low.

Asian markets decline. **South Korea's KOSPI , Shanghai Composite and Hong Kong's Hang Seng** down surged by **0.77% , 0.70% and 0.47%** respectively.

Major **U.S. stock indices**—including the **S&P 500, Dow Jones Industrial Average, and Nasdaq Composite**—experienced notable gains of **0.80%, 0.94% and 0.94%** respectively. In Europe, the **FTSE 100** edged higher by **0.55%**, and Germany's **DAX** experienced a sharp gain of **0.66%**.

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 27th , 2025.

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Other Markets:

- Brent Crude oil prices ended at \$68.21 per barrel.
- The rupee was appreciated to 85.49 levels against the US dollar.
- The 10 Year Benchmark G-Sec yield closed at 6.31% this week.

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