

The Week that was

July 4th 2025

" Markets Lose Steam Amid Global Jitters; Pharma and Durables Shine "

Indian Developments

The **Sensex and Nifty 50** ended the week **in the red**, reversing gains from the previous week. The downturn was primarily attributed to the weakening of the rupee, persistent FII selling—where foreign investors offloaded equities worth ₹1,561.62 crore, leading to a month-to-date outflow of ₹3,531 crore—and lingering uncertainty surrounding India-US trade negotiations.

USD gains were capped by strong U.S. job data and routine demand from importers.

Brent crude oil hovered around **USD 68.75 per barrel** as of **July 4, 2025**, marking a 5.21% gain over the past month. The price movement was influenced by Geopolitical tensions, OPEC+ production strategy, US inventory data and Macroeconomic signals.

Gold prices in India witnessed a **Volatility** this week, driven by upcoming US inflation data and Fed policy signals for further direction

The **Nifty 50** ended the week **lower at 25,405**, marking a **0.69% decline** from the previous week. Meanwhile, the **Nifty Midcap 150** and **Nifty Small cap 250** indices posted **modest gains**, rising by approximately **0.61%** and **0.68%** respectively.

Sectoral Developments

For the week ending **July 4, 2025**, sectoral performance was mixed, with some sectors witnessing profit booking.

Nifty Pharma led the gains, rising to **2.08%**, followed by **Nifty Consumer Durables** (+2.77%), **Nifty PSU Bank** (+1.96%), **Nifty Oil & Gas** (+1.41%), and **Nifty IT** (+0.89%).

Nifty Auto, despite mid-week strength, ended **0.11% lower**.

On the downside, **Nifty Realty** declined sharply by **2.21%**, while **Nifty Financial Services**, **Nifty Bank**, and **Nifty FMCG** fell by **1.75%**, **0.72%**, and **0.68%** respectively.

Global Developments

The **major indexes** were coming off a lackluster performance. Major **U.S. stock indices**—including the **S&P 500**, **Dow Jones Industrial Average**, and **Nasdaq Composite**—experienced notable gains of **1.7%**, **2.3%** and **1.6%** respectively driven by strong job reports, moderating inflation and trade optimism.

In Europe, the **FTSE 100** edged higher by **0.28%**, and Germany's **DAX** declined by **0.41%** amid mixed economic data.

Asian markets decline. **South Korea's KOSPI** and **Hong Kong's Hang Seng** down surged by **1.41%** and **0.62%** respectively. And **Shanghai Composite** gained by **0.70%** influenced by mixed global cues, Trump's July 9th Tariff deadline and global uncertainty.

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 July 4th , 2025.

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Other Markets:

- Brent Crude oil prices ended at \$68.75 per barrel.
- The rupee was depreciated to 85.62 levels against the US dollar.
- The 10 Year Benchmark G-Sec yield closed at 6.29% this week.
- Gold prices closed at Rs 96,609 per 10 grams.

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