

## Market Snapshot

KEY INDICES	06-Jun-25	30-May-25	%Ch
S&P CNX NIFTY	25003.05	24750.70	<b>1.02</b>
SENSEX	82188.99	81451.01	<b>0.91</b>
NIFTY MIDCAP 100	59010.30	57420.00	<b>2.77</b>
NIFTY SMLCAP 100	18582.45	17883.30	<b>3.91</b>

(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	06-Jun-25	30-May-25	%Ch
NIFTY BANK	56578.40	55749.70	<b>1.49</b>
NIFTY AUTO	23661.30	23325.60	<b>1.44</b>
NIFTY FMCG	55802.70	55283.00	<b>0.94</b>
NIFTY IT	37294.85	37321.75	<b>-0.07</b>
NIFTY METAL	9406.45	9193.25	<b>2.32</b>
NIFTY PHARMA	21684.40	21442.05	<b>1.13</b>
NIFTY REALTY	1039.60	949.35	<b>9.51</b>
BSE CG	70797.70	71089.64	<b>-0.41</b>
BSE CD	58399.68	57946.66	<b>0.78</b>
BSE Oil & GAS	27079.74	27030.06	<b>0.18</b>
BSE POWER	6821.34	6804.84	<b>0.24</b>

(Source: [Investing.com](https://www.investing.com))

## FII & DII Activities (Rs Crore)

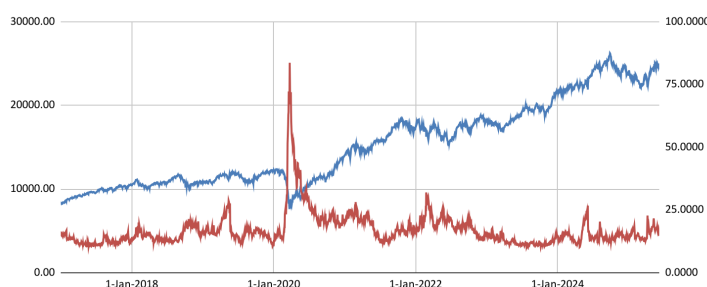
30/05/2025 to 06/06/2025

Activities	FIIs	DIIIs
Buy	138858.67	99605.56
Sell	149366.34	64996.22
Net	<b>-10507.67</b>	<b>34609.34</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nseindia.com))

## Barometers snap 2-week losing streak as RBI cuts repo rate by 50 bps to 5.50%

The key equity indices posted significant gains this week, driven by the Reserve Bank of India's surprise 50 basis points rate cut and a shift in its monetary policy stance from accommodative to neutral. The easing inflation outlook and strong Q4 FY25 GDP growth of 7.4% boosted investor confidence, signalling a stable and supportive economic environment. Broader markets outperformed, reflecting renewed optimism around domestic demand and lower borrowing costs. Despite global headwinds and geopolitical concerns, sentiment remained upbeat as macroeconomic indicators pointed toward a healthy growth-inflation balance.

In the week ended on Friday, 6 June 2025, the S&P BSE Sensex surged 737.98 points or 0.90% to settle at 82,188.99. The Nifty 50 index jumped 252.35 points or 1.01% to settle at 25,003.05. The BSE Mid-Cap index rallied 2.12% to close at 46,096.51. The BSE Small-Cap soared 1.95% to end at 53,440.26.

## Sensex Gainers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
<b>M&amp;M</b>	3105.05	2978.45	<b>4.25</b>
<b>BAJFINANCE</b>	9373.05	9174.75	<b>2.16</b>
<b>POWERGRID</b>	295.85	289.90	<b>2.05</b>
<b>HDFCBANK</b>	1978.70	1944.60	<b>1.75</b>
<b>HINDUNILVR</b>	2388.85	2349.35	<b>1.68</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
<b>TCS</b>	3385.70	3464.50	<b>-2.27</b>
<b>TATASTEEL</b>	157.50	161.00	<b>-2.17</b>
<b>BAJAJFINSV</b>	1989.40	2015.80	<b>-1.31</b>
<b>TATAMOTORS</b>	711.30	719.45	<b>-1.13</b>
<b>ASIANPAINT</b>	2245.45	2260.05	<b>-0.65</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
<b>DRREDDY</b>	1320.90	1251.20	<b>5.57</b>
<b>M&amp;M</b>	3106.50	2976.80	<b>4.36</b>
<b>ADANIPORTS</b>	1471.70	1432.80	<b>2.71</b>
<b>CIPLA</b>	1504.20	1465.70	<b>2.63</b>
<b>HINDALCO</b>	650.15	633.50	<b>2.63</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
<b>HDFCLIFE</b>	755.10	776.85	<b>-2.80</b>
<b>TCS</b>	3384.20	3463.40	<b>-2.29</b>
<b>TATASTEEL</b>	157.49	161.02	<b>-2.19</b>
<b>SBILIFE</b>	1780.60	1812.20	<b>-1.74</b>
<b>BAJAJFINSV</b>	1990.00	2017.40	<b>-1.36</b>

(Source: Capitaline)

The Reserve Bank of India (RBI) cut the policy repo rate by 50 basis points to 5.50%, signalling a shift in its monetary policy stance from accommodative to neutral. In addition, CRR also lowered by 100 bps to boost liquidity. With the rate cut coming into effect immediately, the standing deposit facility (SDF) rate now stands at 5.25%, while the marginal standing facility (MSF) rate and the bank rate are adjusted to 5.75%.

The RBI maintained its real GDP growth projection for FY26 at 6.5%, with quarterly growth seen at 6.5% in Q1, 6.7% in Q2, 6.6% in Q3, and 6.3% in Q4.

On the inflation front, the RBI revised its forecast downward to 3.7% for FY26 from the earlier estimate of 4%. Quarterly projections suggest CPI inflation at 2.9% in Q1, 3.4% in Q2, 3.9% in Q3, and 4.4% in Q4.

The minutes of the MPC meeting will be released on June 20, and the next policy meeting is scheduled from August 4 to 6, 2025.

India's GDP growth touched a four-quarter high of 7.4% in Q4 FY25, with full-year growth ending at 6.5%, according to data released by the government post-market hours Friday. The GDP growth, higher than the previous quarter's 6.4%, was lower than the 8.4% growth logged in Q4 FY24.

Meanwhile, India's fiscal deficit for FY25 stood at 4.8% of GDP, meeting the revised estimate, according to data released by the Comptroller General of Accounts on Friday. The central government's fiscal deficit stood at Rs 15.77 lakh crore, or 100.5% of the revised annual target, compared with 95.4% a year before.

Further, the seasonally adjusted HSBC India Manufacturing PMI declined to 57.6 in May 2025, down from 58.2 in April 2025. The seasonally adjusted HSBC India Services PMI Business Activity Index rose to 58.8 in May from 58.7 in April 2025. The HSBC India Composite PMI Output Index came in at 59.3 in May, down only marginally from 59.7 in April.

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
PRESTIGE	1714.60	1466.60	16.91
L&TFINANCE	189.79	171.29	10.80
GODREJPROP	2467.00	2243.80	9.95
HINDZINC	502.25	458.20	9.61
OBEROIRLTY	1908.20	1746.30	9.27

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	06-Jun-25	30-May-25	%Ch
ABFRL	77.77	85.85	-9.41
SONACOMS	510.15	543.95	-6.21
ALKEM	4862.50	5098.50	-4.63
DEEPAKNTR	1940.60	2027.30	-4.28
IPCALAB	1370.90	1424.80	-3.78

(Source: Capitaline)

## World Markets

KEY INDICES	06-Jun-25	30-May-25	%Ch
DJIA	42762.87	42270.07	1.17
NASDAQ	19529.95	19113.77	2.18
BOVESPA	136102.09	137026.62	-0.67
FTSE 100	8837.91	8772.38	0.75
CAC 40	7804.87	7751.89	0.68
DAX	24304.46	23997.48	1.28
MOEX RUSSIA	2786.16	2828.83	-1.51
NIKKEI 225	37741.61	37965.10	-0.59
HANG SENG	23792.54	23289.77	2.16
STRAITS TIMES	3934.29	3894.61	1.02
SHANGHAI COMPOSITE	3385.36	3347.49	1.13
JAKARTA	CLOSED	CLOSED	-

(Source: Capitaline, [Investing.com](https://www.investing.com))

### Global Markets:

In China, the Caixin/S&P Global manufacturing purchasing managers' index (PMI) declined to 48.3 in May from 50.4 in April. The Caixin China services PMI came in at 51.1 in May, rising from 50.7 in April.

The private sector hiring in the U.S. fell to its lowest level in over two years. Data from payroll processor ADP showed that payrolls increased by only 37,000 in May, compared to a revised 60,000 in April.

The fresh US labor data showed initial jobless claims climbed to 247,000 last week, up from a revised 239,000. Private sector job growth also slowed, with just 37,000 jobs added in May compared to 60,000 in April.

(Source: Capitaline)

### Outlook and Technical View

Development in trade deals between US-India to remain in focus. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 24773, 24543, 24415, 24252 while levels of 25131, 25259, 25489, 25602 may act as resistance with pivot point at 24901.

(Source: Capitaline)

# Derivative Weekly Wrap

## OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	26-Jun-25	24874.00	24852.00	0.09%	123.10	492693	520800	-5.40%
BANKNIFTY	26-Jun-25	56043.40	56082.00	-0.07%	282.55	130248	122844	6.03%

(Source: [NSE](#))

## COST OF CARRY

### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IGL	210.60	212.07	26-Jun-25	12.74%
RBLBANK	217.63	219.06	26-Jun-25	11.99%
PNB	110.18	110.82	26-Jun-25	10.60%
IDEA	6.92	6.96	26-Jun-25	10.55%
DIVISLAB	6544.50	6582.00	26-Jun-25	10.46%
ASHOKLEY	242.04	243.41	26-Jun-25	10.33%
M&MFIN	275.55	277.10	26-Jun-25	10.27%
DABUR	481.25	483.95	26-Jun-25	10.24%
NTPC	332.85	334.70	26-Jun-25	10.14%
BHEL	255.70	257.10	26-Jun-25	9.99%

(Source: [NSE](#))

### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HINDUNILVR	2389.80	2371.50	26-Jun-25	-13.98%
TATACHEM	934.10	929.30	26-Jun-25	-9.38%
PEL	1173.70	1169.00	26-Jun-25	-7.31%
ASIANPAINT	2245.20	2236.50	26-Jun-25	-7.07%
DRREDDY	1320.90	1317.10	26-Jun-25	-5.25%
CHOLAFIN	1593.20	1589.20	26-Jun-25	-4.58%
NESTLEIND	2417.20	2414.70	26-Jun-25	-1.89%
VOLTAS	1271.10	1269.80	26-Jun-25	-1.87%
TATAPOWER	399.55	399.25	26-Jun-25	-1.37%
HDFCLIFE	755.10	754.75	26-Jun-25	-0.85%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	45503875	40675025	<b>1.12</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. SOBHA</b>	<b>2. PRESTIGE</b>	<b>3. BRIGADE</b>	<b>4. DLF</b>	<b>5. GODREJPROP</b>
<b>6. OBEROIRLTY</b>	<b>7. LODHA</b>	<b>8. PHOENIXLTD</b>	<b>9. ANANTRAJ</b>	<b>10. SUZLON</b>
<b>11. POWERINDIA</b>	<b>12. SONACOMS</b>	<b>13. INOXWIND</b>	<b>14. CARBORUNIV</b>	<b>15. BDL</b>
<b>16. KAYNES</b>				

(Source: [Moneycontrol](#))

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