

Market Snapshot

| KEY INDICES | 13-Jun-25 | 06-Jun-25 | %Ch |
|------------------|-----------|-----------|-------|
| S&P CNX NIFTY | 24718.60 | 25003.05 | -1.14 |
| SENSEX | 81118.60 | 82188.99 | -1.30 |
| NIFTY MIDCAP 100 | 58227.45 | 59010.30 | -1.33 |
| NIFTY SMLCAP 100 | 18374.80 | 18582.45 | -1.12 |

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

Sectoral Snapshot

| KEY INDICES | 13-Jun-25 | 06-Jun-25 | %Ch |
|---------------|-----------|-----------|-------|
| NIFTY BANK | 55527.35 | 56578.40 | -1.86 |
| NIFTY AUTO | 23327.40 | 23661.30 | -1.41 |
| NIFTY FMCG | 54527.15 | 55802.70 | -2.29 |
| NIFTY IT | 38469.25 | 37294.85 | 3.15 |
| NIFTY METAL | 9258.80 | 9406.45 | -1.57 |
| NIFTY PHARMA | 21985.15 | 21684.40 | 1.39 |
| NIFTY REALTY | 1007.05 | 1039.60 | -3.13 |
| BSE CG | 69767.45 | 70797.70 | -1.46 |
| BSE CD | 57110.34 | 58399.68 | -2.21 |
| BSE Oil & GAS | 27162.24 | 27079.74 | 0.30 |
| BSE POWER | 6725.34 | 6821.34 | -1.41 |

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

FII & DII Activities (Rs Crore)

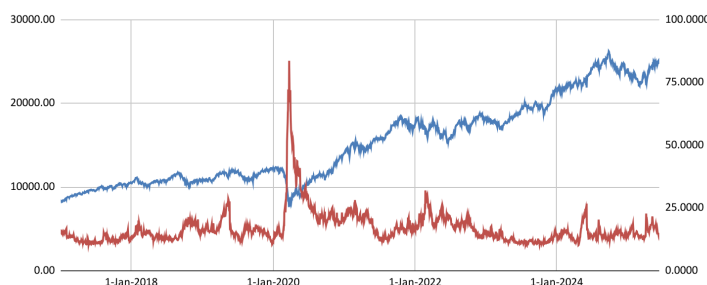
06/06/2025 to 13/06/2025

| Activities | FIIs | DII's |
|------------|----------|-----------|
| Buy | 92996.52 | 101255.10 |
| Sell | 89599.28 | 73275.33 |
| Net | 3397.24 | 27979.77 |

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Benchmarks tumble amid rising geopolitical tensions; Nifty settles below 24,750 mark

The key equity indices posted sharp losses during the week, weighed down by geopolitical tensions, including the ongoing U.S.-China trade talks and escalating hostilities between the U.S. and Iran. Sentiment further deteriorated after Israel carried out military strikes on Iran, heightening tensions in the oil-rich Middle East.

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. The Nifty ended below 24,750 mark. The broader market outperformed the frontline indices.

In the week ended on Friday, 13 June 2025, the S&P BSE Sensex declined 1,070.39 points or 1.30% to settle at 81,118.60. The Nifty 50 index tumbled 284.45 points or 1.14% to settle at 24,718.60. The BSE Mid-Cap index shed 0.90% to close at 45,681.28. The BSE Small-Cap fell 0.13% to end at 53,370.29.

Sensex Gainers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|-----------|-----------|-----------|-------------|
| TECHM | 1658.95 | 1571.45 | 5.57 |
| WIPRO | 260.20 | 248.60 | 4.67 |
| HCLTECH | 1694.85 | 1637.40 | 3.51 |
| INFY | 1601.55 | 1564.05 | 2.40 |
| KOTAKBANK | 2110.80 | 2072.30 | 1.86 |

(Source: Capitaline)

Sensex Losers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|-----------|-----------|-----------|--------------|
| TITAN | 3423.55 | 3561.05 | -3.86 |
| POWERGRID | 285.70 | 295.85 | -3.43 |
| TATASTEEL | 152.20 | 157.50 | -3.37 |
| M&M | 3006.00 | 3105.05 | -3.19 |
| HDFCBANK | 1917.25 | 1978.70 | -3.11 |

(Source: Capitaline)

Nifty Gainers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|---------|-----------|-----------|-------------|
| TECHM | 1659.00 | 1571.10 | 5.59 |
| ONGC | 251.51 | 240.06 | 4.77 |
| WIPRO | 260.21 | 248.59 | 4.67 |
| HCLTECH | 1695.30 | 1637.70 | 3.52 |
| GRASIM | 2663.80 | 2574.40 | 3.47 |

(Source: Capitaline)

Nifty Losers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|-------------|-----------|-----------|--------------|
| ADANI PORTS | 1405.00 | 1471.70 | -4.53 |
| TITAN | 3421.90 | 3559.90 | -3.88 |
| POWERGRID | 285.50 | 295.80 | -3.48 |
| TATASTEEL | 152.13 | 157.49 | -3.40 |
| M&M | 3006.00 | 3106.50 | -3.24 |

(Source: Capitaline)

India's Consumer Price Index (CPI)-based inflation eased to 2.82% in May 2025, down 34 basis points from April's 3.16%, marking the lowest reading since February 2019. A key driver of the decline was food inflation, which dropped to 0.99%, the lowest since October 2021, significantly below both April's 1.78%.

Global Markets:

The UK unemployment rate rose to 4.6% in the three months from February to April, marking its highest level since July 2021, according to official data released Tuesday by the Office for National Statistics (ONS).

The figure represents a 0.2% increase compared to the previous three-month period. Despite the rise in unemployment, the employment rate inched up by 0.1 percentage points to 75.1%, with the total number of employed individuals reaching 34 million.

China's consumer price index declined 0.1% year-on-year in May, unchanged from the previous month, according to government data released Monday. The producer price index fell 3.3% year-on-year, marking the sharpest decline in 22 months and following a 2.7% decrease in April.

U.S. inflation data showed the Consumer Price Index (CPI) rose 2.4% year-over-year in May, slightly above April's 2.3%. On a monthly basis, CPI growth eased to 0.1%.

In U.S., the Producer Price Index (PPI) for final demand rose 0.1% in May, recovering from a revised 0.2% drop in April, according to the Bureau of Labor Statistics.

(Source: Capitaline)

Nifty Midcap 100 Gainers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|-----------------|-----------|-----------|--------------|
| OIL | 477.75 | 424.45 | 12.56 |
| ZEEL | 137.31 | 126.59 | 8.47 |
| OFSS | 9478.50 | 8786.00 | 7.88 |
| BIOCON | 355.40 | 330.05 | 7.68 |
| RAMCOCEM | 1062.55 | 1005.05 | 5.72 |

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

| SCRIPS | 13-Jun-25 | 06-Jun-25 | %Ch |
|-----------------|-----------|-----------|--------------|
| PAYTM | 882.25 | 961.95 | -8.29 |
| CONCOR | 761.45 | 809.50 | -5.94 |
| IGL | 198.88 | 210.60 | -5.57 |
| IRFC | 138.33 | 146.41 | -5.52 |
| INDHOTEL | 735.15 | 776.85 | -5.37 |

(Source: Capitaline)

World Markets

| KEY INDICES | 13-Jun-25 | 06-Jun-25 | %Ch |
|---------------------------|-----------|-----------|--------------|
| DJIA | 42197.79 | 42762.87 | -1.32 |
| NASDAQ | 19406.83 | 19529.95 | -0.63 |
| BOVESPA | 137212.62 | 136102.09 | 0.82 |
| FTSE 100 | 8850.63 | 8837.91 | 0.14 |
| CAC 40 | 7684.68 | 7804.87 | -1.54 |
| DAX | 23516.23 | 24304.46 | -3.24 |
| MOEX RUSSIA | 2750.32 | 2786.16 | -1.29 |
| NIKKEI 225 | 37834.25 | 37741.61 | 0.25 |
| HANG SENG | 23892.56 | 23792.54 | 0.42 |
| STRAITS TIMES | 3911.42 | 3934.29 | -0.58 |
| SHANGHAI COMPOSITE | 3377.00 | 3385.36 | -0.25 |
| JAKARTA | 7166.06 | CLOSED | - |

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

Outlook and Technical View

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Any escalation in on-going conflicts between Israel-Iran may put pressure on markets thereby opening further downside. Development in trade deals between US-China 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 24543, 24367, 24262, 24102 while levels of 24824, 24930, 25106, 25202 may act as resistance with pivot point at 24649.

(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 | 24736.20 | 25090.60 | -1.41% | 17.60 | 473016 | 487224 | -2.92% |
| BANKNIFTY | 26-Jun-25 | 55655.80 | 56795.00 | -2.01% | 128.45 | 130394 | 139664 | -6.64% |

(Source: [NSE](#))

COST OF CARRY

Positive

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|-----------|------------|--------------|-------------|---------------|
| DLF | 851.25 | 855.05 | 26-Jun-25 | 12.53% |
| BPCL | 312.30 | 313.35 | 26-Jun-25 | 9.44% |
| IOC | 140.34 | 140.81 | 26-Jun-25 | 9.40% |
| CHOLAFIN | 1553.80 | 1559.00 | 26-Jun-25 | 9.40% |
| IGL | 198.88 | 199.53 | 26-Jun-25 | 9.18% |
| HINDPETRO | 386.25 | 387.50 | 26-Jun-25 | 9.09% |
| BIOCON | 355.40 | 356.55 | 26-Jun-25 | 9.09% |
| COLPAL | 2371.20 | 2378.70 | 26-Jun-25 | 8.88% |
| POWERGRID | 285.50 | 286.40 | 26-Jun-25 | 8.85% |
| NMDC | 70.37 | 70.59 | 26-Jun-25 | 8.78% |

(Source: [NSE](#))

Negative

| Symbol | Spot Price | Future Price | Expiry Date | Cost of Carry |
|------------|------------|--------------|-------------|---------------|
| HINDUNILVR | 2319.00 | 2296.00 | 26-Jun-25 | -27.85% |
| VEDL | 458.10 | 455.45 | 26-Jun-25 | -16.24% |
| TATAPOWER | 397.20 | 395.25 | 26-Jun-25 | -13.78% |
| VOLTAS | 1277.20 | 1271.70 | 26-Jun-25 | -12.09% |
| HEROMOTOCO | 4333.80 | 4315.90 | 26-Jun-25 | -11.60% |
| BALKRISIND | 2463.80 | 2454.50 | 26-Jun-25 | -10.60% |
| SHREECEM | 29610.00 | 29505.00 | 26-Jun-25 | -9.96% |
| HAVELLS | 1541.10 | 1536.10 | 26-Jun-25 | -9.11% |
| HDFCLIFE | 752.85 | 751.05 | 26-Jun-25 | -6.71% |
| NESTLEIND | 2376.80 | 2372.90 | 26-Jun-25 | -4.61% |

(Source: [NSE](#))

PUT CALL-RATIO

| Symbol | PUT | CALL | RATIO |
|--------------|----------|----------|-------------|
| NIFTY | 59738700 | 60699250 | 0.98 |

(Source: Capitaline)

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

| | | | | |
|----------------------|-------------------|---------------------|------------------|--------------------|
| 1. OFSS | 2. TECHM | 3. WIPRO | 4. LTIM | 5. MPHASIS |
| 6. PERSISTENT | 7. HCLTECH | 8. INFY | 9. TCS | 10. COFORGE |
| 11. BRIGADE | 12. SOBHA | 13. ANANTRAJ | 14. LODHA | 15. RAYMOND |
| 16. PRESTIGE | | | | |

(Source: [Moneycontrol](#))

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