

## Market Snapshot

KEY INDICES	20-Jun-25	13-Jun-25	%Ch
<b>S&amp;P CNX NIFTY</b>	25112.40	24718.60	<b>1.59</b>
<b>SENSEX</b>	82408.17	81118.60	<b>1.59</b>
<b>NIFTY MIDCAP 100</b>	57995.50	58227.45	<b>-0.40</b>
<b>NIFTY SMLCAP 100</b>	18194.20	18374.80	<b>-0.98</b>

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

## Sectoral Snapshot

KEY INDICES	20-Jun-25	13-Jun-25	%Ch
<b>NIFTY BANK</b>	56252.85	55527.35	<b>1.31</b>
<b>NIFTY AUTO</b>	23679.35	23327.40	<b>1.51</b>
<b>NIFTY FMCG</b>	54630.95	54527.15	<b>0.19</b>
<b>NIFTY IT</b>	38991.45	38469.25	<b>1.36</b>
<b>NIFTY METAL</b>	9138.60	9258.80	<b>-1.30</b>
<b>NIFTY PHARMA</b>	21613.00	21985.15	<b>-1.69</b>
<b>NIFTY REALTY</b>	1013.65	1007.05	<b>0.66</b>
<b>BSE CG</b>	69259.02	69767.45	<b>-0.73</b>
<b>BSE CD</b>	56943.91	57110.34	<b>-0.29</b>
<b>BSE Oil &amp; GAS</b>	26781.43	27162.24	<b>-1.40</b>
<b>BSE POWER</b>	6603.14	6725.34	<b>-1.82</b>

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

## FII & DII Activities (Rs Crore)

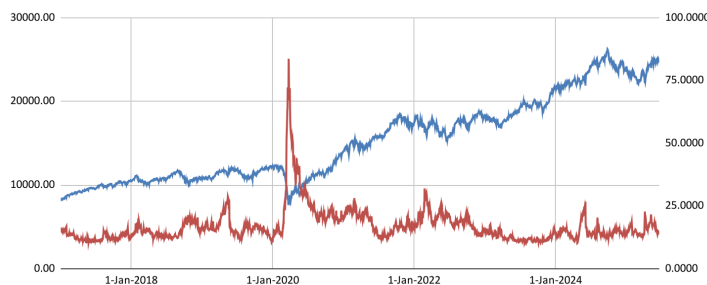
13/06/2025 to 20/06/2025

Activities	FIIs	DIIIs
<b>Buy</b>	77871.90	93837.93
<b>Sell</b>	79938.09	78160.91
<b>Net</b>	<b>-2066.19</b>	<b>15677.02</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

## Indices end with robust gains; Nifty settles above 25,100 level

The domestic markets ended with major gains during the week despite overcoming midweek weakness caused by rising tensions between Israel and Iran. After three straight sessions of losses, markets rebounded sharply on Friday. Broader markets underperformed. Investors largely overlooked domestic economic data and remained focused on geopolitical developments.

In the week ended on Friday, 20 June 2025, the S&P BSE Sensex surged 1,289.57 points or 1.58% to settle at 82,408.17. The Nifty 50 index jumped 393.8 points or 1.59% to settle at 25,112.40. The BSE Mid-Cap index shed 0.44% to close at 45,480.26. The BSE Small-Cap declined 1.85% to end at 52,378.52.

India's wholesale price inflation (WPI) declined to a 14-month low of 0.39% in May 2025, down from 0.85% in April.

Meanwhile, India's trade deficit for May 2025 narrowed to \$21.88 billion from a five-month high of \$26.42 billion in April, Commerce Ministry said on June 16. Imports declined

## Sensex Gainers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
M&M	3182.30	3006.00	<b>5.86</b>
BHARTIARTL	1936.95	1842.15	<b>5.15</b>
MARUTI	12806.15	12411.45	<b>3.18</b>
ASIANPAINT	2284.95	2215.30	<b>3.14</b>
INDUSINDBK	840.30	816.55	<b>2.91</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
TATAMOTORS	676.10	712.05	<b>-5.05</b>
BAJFINANCE	904.65	933.42	<b>-3.08</b>
SUNPHARMA	1664.00	1688.70	<b>-1.46</b>
BAJAJFINSV	1983.35	2010.90	<b>-1.37</b>
HINDUNILVR	2304.90	2319.10	<b>-0.61</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
M&M	3184.40	3006.00	<b>5.93</b>
BHARTIARTL	1936.70	1840.40	<b>5.23</b>
EICHERMOT	5525.00	5319.00	<b>3.87</b>
HDFCLIFE	778.95	752.85	<b>3.47</b>
ASIANPAINT	2285.70	2214.20	<b>3.23</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
TATAMOTORS	676.20	712.05	<b>-5.03</b>
GAIL	181.85	191.34	<b>-4.96</b>
ADANI PORTS	1349.30	1405.00	<b>-3.96</b>
BAJFINANCE	905.00	933.10	<b>-3.01</b>
DRREDDY	1325.30	1362.50	<b>-2.73</b>

(Source: Capitaline)

1.7% year-on-year to \$60.61 billion, while exports dipped 2.2% to \$38.73 billion in the same period.

### Global Markets:

In Europe inflation eased slightly to 3.4% in May, down from 3.5% in April, according to data released by the U.K.'s Office for National Statistics.

Retail sales in the U.K. fell by 2.7% in May - the steepest monthly drop since December 2023.

Sweden's central bank cut its key interest rate by 25 basis points on Wednesday to 2% amid weakening inflation but pointed to geopolitical risks ahead.

Norway's central bank has cut interest rates by 25 basis points to 4.25% for the first time since the start of the Covid-19 pandemic.

The Swiss National Bank has cut interest rates by a further 25 basis points to 0%-adding to concerns over a potential return to negative rates.

In Taiwan The central bank kept its policy rate unchanged at 2% on Thursday, as widely expected, given the island's robust tech-driven economy and moderating inflation, and maintained its economic growth outlook for the year.

The Philippine central bank cut its key interest rate by a quarter of a percentage point to 5.25% for a second time this year and signaled there's scope for further easing, with inflation likely to remain modest and economic growth at risk from global uncertainties.

Japan's exports in May declined 1.7% year-on-year, which is lower than the decline of 3.8% that was widely anticipated by the markets.

In China The country released a mix of economic indicators that painted a somewhat uneven picture. Retail sales in May shot up 6.4% from a year earlier, signaling a boost in

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
ABCAPITAL	260.28	240.37	<b>8.28</b>
TRENT	5897.50	5590.00	<b>5.50</b>
MFSL	1595.30	1526.00	<b>4.54</b>
INDHOTEL	765.65	735.15	<b>4.15</b>
PERSISTENT	6106.50	5882.50	<b>3.81</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	20-Jun-25	13-Jun-25	%Ch
HINDZINC	438.60	514.25	<b>-14.71</b>
TTML	63.62	71.60	<b>-11.15</b>
FLUOROCHEM	3383.40	3727.20	<b>-9.22</b>
ADANIPOWER	530.25	570.90	<b>-7.12</b>
BANKINDIA	113.18	121.19	<b>-6.61</b>

(Source: Capitaline)

consumer spending. But industrial output slowed to 5.8% year-on-year, down from 6.1% in April.

Meanwhile, fixed-asset investment rose 3.7% in the January-May period, slightly weaker than the 4% growth seen in the first four months. The urban unemployment rate dipped to 5.0% in May, the lowest since November 2023.

China kept its benchmark lending rates unchanged Friday. The People's Bank of China held the 1-year loan prime rate at 3.0% and 5-year LPR at 3.5%, according to a statement Friday.

The Fed held its benchmark rate steady at 4.25%-4.5% on Wednesday, marking no change since December. Fed Chair Jerome Powell indicated the committee would wait to assess the inflationary impact of President Trump's tariff measures before considering any policy shifts.

(Source: Capitaline)

## 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 and 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 24885, 24658, 24533, 24412 while levels of 25238, 25363, 25590, 25702 may act as resistance with pivot point at 25011.

(Source: Capitaline)

## World Markets

KEY INDICES	20-Jun-25	13-Jun-25	%Ch
DJIA	42206.82	42197.79	<b>0.02</b>
NASDAQ	19447.41	19406.83	<b>0.21</b>
BOVESPA	137115.83	137212.62	<b>-0.07</b>
FTSE 100	8774.65	8850.63	<b>-0.86</b>
CAC 40	7589.66	7684.68	<b>-1.24</b>
DAX	23350.55	23516.23	<b>-0.70</b>
MOEX RUSSIA	2751.04	2750.32	<b>0.03</b>
NIKKEI 225	38403.23	37834.25	<b>1.50</b>
HANG SENG	23530.48	23892.56	<b>-1.52</b>
STRAITS TIMES	3883.43	3911.42	<b>-0.72</b>
SHANGHAI COMPOSITE	3359.90	3377.00	<b>-0.51</b>
JAKARTA	6907.14	7166.06	<b>-3.61</b>

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

## 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	25096.50	24736.20	1.46%	-15.90	434160	473016	-8.21%
BANKNIFTY	26-Jun-25	56292.80	55655.80	1.14%	39.95	116738	130394	-10.47%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
NESTLEIND	2360.40	2373.10	26-Jun-25	32.73%
SHREECEM	28875.00	29010.00	26-Jun-25	28.44%
PEL	1131.30	1135.30	26-Jun-25	21.51%
INDUSINDBK	840.25	842.75	26-Jun-25	18.10%
IOC	138.65	139.04	26-Jun-25	17.11%
GLENMARK	1636.70	1641.00	26-Jun-25	15.98%
ADANIENT	2448.40	2454.80	26-Jun-25	15.90%
ICICIPRULI	633.75	635.40	26-Jun-25	15.84%
TITAN	3519.00	3528.00	26-Jun-25	15.56%
EXIDEIND	380.25	381.20	26-Jun-25	15.20%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
VOLTAS	1293.90	1265.90	26-Jun-25	-131.64%
VEDL	447.10	440.20	26-Jun-25	-93.88%
HINDUNILVR	2306.20	2281.90	26-Jun-25	-64.10%
HEROMOTOCO	4338.50	4306.30	26-Jun-25	-45.15%
IGL	205.67	204.24	26-Jun-25	-42.30%
BIOCON	351.35	349.30	26-Jun-25	-35.49%
COLPAL	2402.30	2396.20	26-Jun-25	-15.45%
WIPRO	266.54	266.06	26-Jun-25	-10.96%
HINDALCO	649.15	648.15	26-Jun-25	-9.37%
IDEA	6.56	6.55	26-Jun-25	-9.27%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	157957975	140972400	<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. M&amp;M</b>	<b>2. EICHERMOT</b>	<b>3. MARUTI</b>	<b>4. TVSMOTOR</b>	<b>5. BOSCHLTD</b>
<b>6. ASHOKLEY</b>	<b>7. HEROMOTOCO</b>	<b>8. ADANIPOWER</b>	<b>9. NHPC</b>	<b>10. ADANIGREEN</b>
<b>11. SUZLON</b>	<b>12. TATAPOWER</b>			

(Source: [Moneycontrol](#))

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