

Market Snapshot

KEY INDICES	27-Jun-25	20-Jun-25	%Ch
S&P CNX NIFTY	25637.80	25112.40	2.09
SENSEX	84058.90	82408.17	2.00
NIFTY MIDCAP 100	59385.15	57995.50	2.40
NIFTY SMLCAP 100	18976.80	18194.20	4.30

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

Sectoral Snapshot

KEY INDICES	27-Jun-25	20-Jun-25	%Ch
NIFTY BANK	57443.90	56252.85	2.12
NIFTY AUTO	24007.95	23679.35	1.39
NIFTY FMCG	55109.00	54630.95	0.88
NIFTY IT	38822.95	38991.45	-0.43
NIFTY METAL	9578.20	9138.60	4.81
NIFTY PHARMA	21928.60	21613.00	1.46
NIFTY REALTY	993.95	1013.65	-1.94
BSE CG	71548.78	69259.02	3.31
BSE CD	59533.77	56943.91	4.55
BSE Oil & GAS	27919.83	26781.43	4.25
BSE POWER	6929.40	6603.14	4.94

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

FII & DII Activities (Rs Crore)

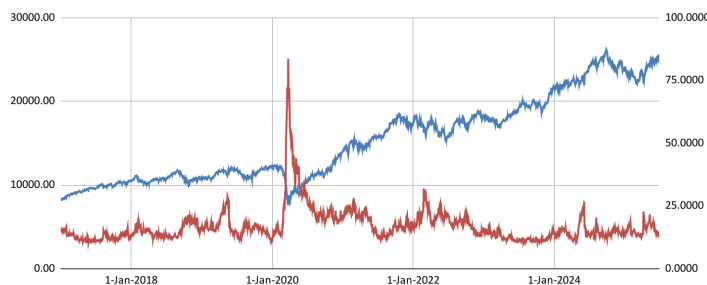
20/06/2025 to 27/06/2025

Activities	FIIs	DIIIs
Buy	137764.31	115751.89
Sell	122616.77	113877.75
Net	15147.54	1874.14

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



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

Market rally for second consecutive week amid easing geopolitical tensions, strong economic data

The headline equity benchmarks saw a strong rebound this week, closing in the green for four out of five sessions. Supported by easing geopolitical tensions, strong global cues, positive domestic economic data, and robust FII buying, Monday was the only red day, as investor sentiment was rattled by U.S. airstrikes on Iranian nuclear sites, sparking fears of a broader Middle East conflict. However, from Tuesday onward, markets gained for four straight sessions, buoyed by news of a tentative ceasefire between Iran and Israel and strong FII inflows. Upbeat India PMI data further boosted sentiment.

Additionally, several SME and mainboard IPOs launched during the week helped increase market liquidity and investor participation.

In the week ended on Friday, 27 June 2025, the S&P BSE Sensex surged 1,650.73 points or 2% to settle at 84,058.90. The Nifty 50 index soared 525.40 points or 2.09% to settle at

Sensex Gainers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
ULTRACEMCO	12234.95	11443.15	6.92
TATASTEEL	161.40	151.90	6.25
BHARTIARTL	2027.90	1936.95	4.70
BAJFINANCE	946.55	904.65	4.63
TITAN	3665.10	3517.35	4.20

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
MARUTI	12644.90	12806.15	-1.26
TECHM	1675.10	1696.40	-1.26
HCLTECH	1725.10	1739.75	-0.84
INFY	1608.60	1621.85	-0.82
WIPRO	265.05	266.35	-0.49

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
SHREECEM	31030.00	28875.00	7.46
HINDALCO	697.35	649.15	7.43
ADANI PORTS	1440.20	1349.30	6.74
ULTRACEMCO	12213.00	11458.00	6.59
TATASTEEL	161.45	151.97	6.24

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
ONGC	242.83	251.89	-3.60
DRREDDY	1301.00	1325.30	-1.83
TECHM	1674.40	1696.10	-1.28
MARUTI	12642.00	12791.00	-1.16
HCLTECH	1723.30	1739.90	-0.95

(Source: Capitaline)

25,637.80. The BSE Mid-Cap index jumped 2.33% to close at 46541.25. The BSE Small-Cap index zoomed 3.57% to end at 54,249.40.

The HSBC Flash India Composite Output Index, which tracks month-on-month changes in combined output from manufacturing and services, rose to 61.0 in June from 59.3 in May - the highest in 14 months and well above the long-term average.

Manufacturing led the growth, with the Manufacturing PMI Output Index climbing to 61.5 in June from 60.3 in May. The overall Manufacturing PMI rose to 58.4, its best level since April 2024, signalling improved operating conditions.

The HSBC Flash India Services PMI Business Activity jumped to 60.7 from 58.8, showing a strong uptick in service sector growth.

Global Markets:

On the macro front, Japan delivered a pleasant surprise. Its manufacturing sector returned to expansion in June, with the au Jibun PMI rising to 50.4 from May's 49.4. The services sector also saw steady growth, with the index nudging up to 51.5 from 51.0.

In Japan, fresh inflation data from Tokyo offered a mild surprise. Core CPI, which excludes volatile food and fuel prices, rose 3.1% year-on-year in June, cooler than the 3.6% reading in May, hinting at easing price pressures.

China's May industrial data. The country's industrial profits fell 9.1% year on year in the first five months of the year, according to the National Bureau of Statistics. This marked the largest decline since October last year, when industrial profits fell by 10%. Industrial profits are a crucial indicator of the financial health of China's factories, mines, and utilities.

The U.S. economy hit a speed bump—GDP contracted at an annualized rate of 0.5% in Q1, marking the first dip since 2022. At the same time, weekly jobless claims dropped by

Nifty Midcap 100 Gainers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
IDEA	7.38	6.56	12.50
HINDPETRO	439.00	392.25	11.92
ABBOTINDIA	34940.00	31620.00	10.50
ADANIPOWER	584.35	530.25	10.20
POONAWALLA	455.75	414.90	9.85

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	27-Jun-25	20-Jun-25	%Ch
OIL	433.40	464.90	-6.78
LALPATHLAB	2768.90	2912.30	-4.92
OFSS	8991.00	9395.50	-4.31
POLICYBZR	1819.90	1901.30	-4.28
ASTRAL	1500.40	1558.50	-3.73

(Source: Capitaline)

World Markets

KEY INDICES	27-Jun-25	20-Jun-25	%Ch
DJIA	43819.27	42206.82	3.82
NASDAQ	20273.46	19447.41	4.25
BOVESPA	136865.80	137115.83	-0.18
FTSE 100	8798.91	8774.65	0.28
CAC 40	7691.55	7589.66	1.34
DAX	24033.22	23350.55	2.92
MOEX RUSSIA	2806.11	2751.04	2.00
NIKKEI 225	40150.79	38403.23	4.55
HANG SENG	24284.15	23530.48	3.20
STRAITS TIMES	3966.20	3883.43	2.13
SHANGHAI COMPOSITE	3424.23	3359.90	1.91
JAKARTA	CLOSED	6907.14	-

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

10,000, though economists caution the unemployment rate could inch up in June as job seekers face a tighter market.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. 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 25556, 25452, 25312, 25202 while levels of 25686, 25736, 25817, 25982 may act as resistance with pivot point at 25605.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	31-Jul-25	25757.00	25192.00	2.24%	119.20	47067	288417	-83.68%
BANKNIFTY	31-Jul-25	57637.00	56474.00	2.06%	193.10	152922	29407	420.02%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
TORNTPHARM	3341.40	3370.60	31-Jul-25	9.38%
ACC	1920.20	1935.60	31-Jul-25	8.61%
GLENMARK	1711.20	1724.80	31-Jul-25	8.53%
AUROPHARMA	1121.00	1129.70	31-Jul-25	8.33%
SIEMENS	3178.40	3202.80	31-Jul-25	8.24%
CANBK	110.98	111.83	31-Jul-25	8.22%
NATIONALUM	190.83	192.29	31-Jul-25	8.21%
ONGC	242.83	244.68	31-Jul-25	8.18%
PNB	106.34	107.15	31-Jul-25	8.18%
TORNTPOWER	1473.20	1484.40	31-Jul-25	8.16%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
PAGEIND	49440.00	47580.00	31-Jul-25	-40.39%
CHOLAFIN	1654.10	1636.30	31-Jul-25	-11.55%
HEROMOTOCO	4320.30	4282.90	31-Jul-25	-9.29%
BOSCHLTD	32260.00	32010.00	31-Jul-25	-8.32%
DABUR	486.35	483.15	31-Jul-25	-7.06%
UPL	644.90	641.85	31-Jul-25	-5.08%
BHARTIARTL	2027.10	2019.80	31-Jul-25	-3.87%
CUMMINSIND	3337.20	3329.40	31-Jul-25	-2.51%
MUTHOOTFIN	2570.70	2565.10	31-Jul-25	-2.34%
PETRONET	302.40	301.80	31-Jul-25	-2.13%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	41543775	32299200	1.29

(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. ADANIPOWER	2. ADANIGREEN	3. SUZLON	4. TORNTPOWER	5. BHEL
6. TATAPOWER	7. JSWENERGY	8. NHPC	9. LODHA	10. BRIGADE
11. PRESTIGE	12. GODREJPROP			

(Source: [Moneycontrol](#))

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