



## Market Outlook:

**30-June-2025**

The domestic equity benchmarks took a hit on Monday as rising tensions in the Middle East spooked investors. The S&P BSE Sensex, tanked 511.38 points or 0.62% to 81,896.79. The Nifty 50 index slipped 140.05 points or 0.56% to 24,971.90. The headline equity benchmarks ended with modest gains after a volatile session on Tuesday lifted early on by broad-based buying but later weighed down by fresh geopolitical worries. The S&P BSE Sensex, added 158.32 points or 0.19% to 82,055.11. The Nifty 50 index rose 72.45 points or 0.29% to 25,044.35. Equity benchmarks ended sharply higher on Wednesday, buoyed by positive global cues as investor sentiment improved following signs of a tentative ceasefire between Israel and Iran. A strong showing by IT and consumer durables stocks helped push the indices higher. The S&P BSE Sensex surged 700.40 points (0.85%) to close at 82,755.51, while the Nifty 50 jumped 200.40 points (0.80%) to 25,244.75. Over the two consecutive sessions, the Sensex has gained 1.05%, and the Nifty has climbed 1.09%. The domestic equity benchmarks extended their winning streak for a third straight session on Thursday, closing with solid gains on the back of firm global cues and hopes of de-escalation in the Israel-Iran conflict. The monthly F&O expiry added to the action, with benchmarks logging a strong upmove of over 1%. The S&P BSE Sensex zoomed 1,000.36 points or 1.21% to 83,755.87. The Nifty 50 index surged 304.25 points or 1.21% to 25,549. In the three consecutive sessions, the Sensex advanced 2.27% while the Nifty rose 2.31%. The domestic equity benchmarks ended with minor gains on Friday, marking the fourth consecutive day of gains, driven by strong foreign institutional investor (FII) inflows, global optimism, and the U.S. Federal Reserve signaling a softer policy outlook. The positive momentum persisted despite lingering global risks and concerns over upcoming tariff deadlines. The S&P BSE Sensex, jumped 303.03 points or 0.36% to 84,058.90. The Nifty 50 index rose 88.80 points or 0.35% to 25,637.80. In four consecutive trading sessions, the Sensex advanced 2.64% while the Nifty rose 2.66%.

Indian equity markets appear poised to begin the coming week on a cautiously optimistic note. The ceasefire between Israel and Iran has lifted a major geopolitical overhang, nudging global investors back into risk-on mode. Adding to the cheer, a successful NATO summit and renewed European commitment to defense spending have reassured markets wary of growing US isolationism. The spotlight has now shifted squarely to the US Federal Reserve and the looming July 9 trade tariff deadline. While Federal Reserve Chair Jerome Powell's recent testimony to the US Senate did not significantly impact market expectations, investor attention remains focused on upcoming US data, and any clarity on reciprocal US tariffs. Both factors could influence global sentiment. Closer to home, foreign institutional investors have resumed their buying spree, which has helped bolster Indian benchmarks. Market breadth has been encouraging, with strong participation across mid and smallcaps, reinforcing a "buy on dips" strategy. On the technical front, Nifty closed just above the 25,600 mark on Friday, 27 June 2025. A sustained close above the 25,750-25,800 zone will be crucial to reignite upward momentum. A breakout above this level could open up 26,000, and potentially pave the way for a retest of the record high at 26,277. On the flip side, the 25,300-25,400 band will act as strong support, and any breach of this could trigger short-term profit booking.

## Major Events for Next Week

### Domestic:

Federal Fiscal Deficit, INR (Apr)	30-June-25
Trade Deficit – RBI (Q1)	30-June-25
FX Reserves, USD	04-July-25

### International:

US API Weekly Crude Oil Stock	01-July-25
US EIA Crude Oil Stocks Change	02-July-25
US Continuing Jobless Claims	03-July-25
US Initial Jobless Claims	03-July-25
US EIA Natural Gas Storage Change	03-July-25

## Major News:

- **HCL Tech:** The company expanded its partnership with the sales force to accelerate enterprise adoption of Agent AI with new services.
- **Hitachi Energy:** The company received an order worth delivering 765 kV transformers to Power Grid Corp to advance the country's grid expansion.
- **NTPC:** The company commissioned 660 MW unit-3 of Barh super thermal power project stage-I from July 1, 2025.
- **New India Assurance:** The company received show cause notice for Rs 2,298 crore GST demand for period between April 2018-March 2023.
- **Embassy Developments:** The company acquired 100% stake of squadron developers private for Rs 456.6 crore.
- **Sterling Tools:** The company received show cause notice proposing GST demand Of Rs 9.7 crore from Dehradun GST body.
- **L&T Finance:** The company allotted 22,500 secured NCDs aggregating Rs 225 crore via private placement basis.
- **Premier Energies:** The company commissioned a new 1.2 GW TOPCon solar cell manufacturing line in Hyderabad.
- **Sagility India:** The company approved a change in company name to Sagility.
- **GMR Airports:** ESR GMR Logistics Park becomes the arm of GMR Hyderabad international airport.
- **Biocon:** The company approved to buy 1,125 optionally convertible debentures of arm for \$198.50 million.
- **Hindustan Copper:** The entered tripartite agreement with Alankit Assignments (New RTA) and CB Management
- **Ultratech Cement:** The company commissioned a second cement grinding mill with 1.8 MTPA capacity at the company's unit in Madhya Pradesh.
- **Sky Gold:** The company approved the allotment of 2.07 lakh shares on the Conversion Of 2.07 lakh warrants at issue price of Rs 1,017 per share and further approved the allotment of 18.6 lakh shares under bonus issue in the ratio of 9:1.
- **Nucleus Software:** The company re-appointed Parag Bhise as whole-time director for eight years and Ritika Dusad as whole-time director for a further five years.
- **Deep Industries:** The company received an order worth Rs 45 crore from Oil India for hiring a number of mobile works over Rig Package.
- **Suryoday Small Finance Bank:** The company re-appointed Baskar Babu Ramachandran as managing director, chief executive officer for a further three years.
- **Western Carriers:** The company received Rs 230 crore an order from Jindal Stainless for an end-to-end EXIM agreement for rail transportation of EXIM containers.
- **Diamond Power:** The company announced recommissioning of EHV testing laboratory with NABL accreditation.
- **Share India Securities:** The company approved Rs 41-crore investment in Master Trust by acquiring up to 27 lakh shares.
- **Bansal Wire Industries:** The company received show cause notice of Rs 127 crore including interest and penalty from Ghaziabad GST body for FY19.
- **Bharti Airtel:** Telecom department imposed a penalty of Rs 6.48 lakh.
- **Wheels India:** The company approved the acquisition of 7.64 lakh shares of Axles India from forge 2000 for Rs 22.68 crore.
- **Balaji Amines:** The company received consent to operate the manufacture of ISOPROPYLAMINE. Trial runs will start and commencement of commercial Production will take effect shortly.
- **Union Bank of India:** The company approved raising funds up to Rs 6,000 crore via debt and equity.
- **SMS Pharma:** U.S FDA concluded inspection at Telangana facility with Zero form 483 observations. The inspection was conducted from June 23-25.
- **Dilip Buildcon:** The company provisionally completed the construction of four lane Bengaluru-Chennai Expressway in Andhra Pradesh.
- **Jio Financial Services:** The company will invest Rs 190 crore in the arm Jio Payments Bank.
- **Timex Group:** Promoter Timex Group Luxury Watches will exercise oversubscription option in OFS. B V to sell up to 15% stake via offer for sale on June 25 and 26.
- **PTC Industries:** The company's arm Aerolloy Tech signed an MoU with Safran Aircraft Engines for Military Aircraft Engines.
- **Vodafone Idea:** The telecom firm clarified that it has not received any communication from the government regarding relief on Rs 84,000 crore dues against the reports citing the Government considering relief on AGR dues.
- **Timex Group:** Promoter Timex Group Luxury Watches B V to sell up to 15% stake via offer for sale on June 25 and 26. The company has announced floor price for the issue of Rs 175 per share, a discount of 35% of the current market price.
- **Aurobindo Pharma:** The company's arm received Marketing Authorisation from UK's medicines and healthcare products regulatory agency for Dyrupreg, Pegylated Filgrastim Biosimilar.
- **Sterlite Technology:** The company received 11.12 crore arbitral award in its favour. The company had filed a statement of claim against BSNL for Non-Payment of AMC cost of Rs 11.12 crore.
- **JB Chemicals:** The company received USFDA approval for an abbreviated new drug application of Amitriptyline Hydrochloride Tablets. Amitriptyline hydrochloride is indicated for relief of symptoms of depression.
- **Rashtriya Chemicals:** The company approved issuance of NCDs worth Rs 300 crore including green shoe option on private placement basis.
- **Kaynes Technologies:** The company closed its QIP, allotted 28.7 lakh shares at issue price of Rs 5,569.5 per share. The issue price is at a discount of Rs 56.25 per share to floor price of Rs 5,625.75 per share.
- **Hindalco:** The company signed agreements to acquire 100% stake in AluChem companies for \$125 million.
- **BLS E-Services:** The company's arm signed definitive agreement to acquire customer service points of SBI and HDFC Bank.
- **Kfin Tech:** The company reappointed Vishwanathan Mavila Nair as chairperson of board effective October 01, 2025.
- **Inox Wind:** The company allotted 76 crore shares following the scheme of arrangement with Inox Wind Energy. Allots 632 shares of Inox Wind for every 10 shares held in Inox Wind Energy.
- **Rites:** The company received a letter of intent for Rs 28.5 crore order from Gujarat urban development company.
- **Union Bank of India:** The company cancels appointment of Pankaj Dwivedi as ED with immediate effect.
- **TVS Motors:** The company announced the launch of the all new TVS HLX 150 5G in the Republic of Congo.
- **Sona BLW Precision Forgings:** The company appointed Jeffrey Mark overly as Chairperson.
- **Satin Creditcare:** The board is to meet on June 27 to consider raising funds up to Rs 5,000 crore via NCDs.
- **Mahindra Lifespace Developers:** The company announced the launch of Mahindra 'Codename64', a landmark residential development in Malad (West), Mumbai.
- **KPIT:** The company in its mid-quarter update mentioned that the overall business environment continues to be uncertain with rising geopolitical concerns and ambiguity around the overall tariff scenario. For the company, the pipeline continues to be strong. Substantial pipeline however is moving in a positive direction. In geos, Europe is looking positive.
- **ITI:** The company received a final tranche of Rs 25 crore from C-DOT, as part of executed sale agreement between ITI and C-DOT.
- **Metro Brands:** Clarks, the iconic British footwear brand has announced a strategic partnership with the company. Under the agreement, the company is appointed as Clarks exclusive retail and digital partner for India and neighbouring countries including Bangladesh, Bhutan, Nepal, Maldives and Sri Lanka. Metro Brands will manage Clarks' e-commerce operations in India,
- **Chambal Fertilizer:** The board approved the dissolution of step-down arm ISGN Corp.
- **All-Cargo Logistics** -The company reported LCL volume down by 4% year-on-year at 7,28,000 cubic meters.
- **Lemon Tree Hotels:** The company signed a new 47-Room Property in Punjab.
- **Avantel:** The company re-appointed Abburi Vidyasagar as managing director for 3 years.

Global Market Round Up:

Global Markets

US Market

US stock market ended higher on Friday, with the S&P 500 and Nasdaq recording their all-time closing highs. The Dow Jones Industrial Average surged 432.43 points, or 1.00%, to 43,819.27, while the S&P 500 gained 32.05 points, or 0.52%, to 6,173.07. The Nasdaq Composite closed 105.55 points, or 0.52%, higher at 20,273.46. All three major Wall Street indexes posted weekly gains. Nvidia share price rose 1.8%, while Amazon shares rallied 2.85%. Micron Technology shares eased 0.98%, while Tesla stock price dropped 1.43%. Nike shares jumped 15.2%.

European Markets

European stocks were set for a weekly gain on optimism that the European Union and the US can clinch some form of trade agreement in the coming weeks. The Stoxx Europe 600 Index rose 0.9% by 3:45 p.m. in London, with automakers and consumer products stocks outperforming. Sportswear companies Adidas AG and Puma SE rose after US peer Nike Inc.'s fourth-quarter revenue beat expectations and it said a yearlong sales decline is starting to ease.

Asian Market

Asian markets traded higher on Monday as investors analyse details on trade negotiations and key economic data in the region. Japanese Nikkei 225 rallied 1.68%, while the Topix index gained 0.96%. South Korea's Kospi index advanced 0.85%, while the Kosdaq was flat. Hong Kong's Hang Seng index futures indicated a stronger opening.

Gift Nifty

Gift Nifty was trading around 25,770 level, a premium of nearly 20 points from the Nifty futures' previous close, indicating a mildly positive start for the Indian stock market indices.

Indices

Emerging Markets

	Closing 27/06/25	Closing 20/06/25	% Chg	Week High / Low		52 Week High / Low	
Sensex	84059	82408	2.0	84089	81477	85978	71425
Nifty	25638	25112	2.1	25654	24825	26277	21744
Shanghai	3424	3360	1.9	3463	3348	3674	2690
Bovespa (Brazil)	137114	138717	-1.2	138156	135565	140382	118223
Argentina (Marvel)	2041078	2064099	-1.1	2066813	2024393	2867775	1333622
Chile	8213	8077	1.7	8214	8140	8493	6082

US Markets

	Closing 27/06/25	Closing 20/06/25	% Chg	Week High / Low		52 Week High / Low	
DJIA	43819	42207	3.8	43966	43084	45074	36612
S&P 500	6173	5968	3.4	6188	23521	6188	4835
Nasdaq	20273	19447	4.2	20312	19982	20312	14784

European Markets

	Closing 27/06/25	Closing 20/06/25	% Chg	Week High / Low		52 Week High / Low	
FTSE	8799	8775	0.3	3971	8708	8909	7545
DAX	24033	23351	2.9	24041	23521	24479	17025
CAC 40	7692	7590	1.3	7692	7532	8258	6764

Asia Pacific Markets

	Closing 27/06/25	Closing 20/06/25	% Chg	Week High / Low		52 Week High / Low	
Nikkei	40151	38403	4.6	40268	38026	42427	30793
KOSPI	3056	3022	1.1	3129	2971	3129	2285
Hang Seng	24284	23530	3.2	24533	23273	24874	16441
Strait Times	3966	3883	2.1	3966	3846	4005	3198
KLCI Malayasia	1528	1501	1.8	1528	1489	1685	1387

## Sector wise movement during the week

SECTOR	CLOSE (27 June)	CLOSE (20 June)	% Chg	Week High	Week Low	52 Week High	52 Week Low	% Chg 52 week High	% Chg 52 week Low
Nifty Index	25638	25112	2.1	25654	24825	26277	21744	-2.4	17.9
Sensex	84059	82408	2.0	84089	81477	85978	71425	-2.2	17.7
BSE500	37061	36158	2.5	37084	35822	38740	30572	-4.3	21.2
BSE200	11614	11351	2.3	11621	11242	12107	9699	-4.1	19.7
BSEMDCAP	46541	45480	2.3	46657	45033	49701	37203	-6.4	25.1
BSESMCAP	54249	52379	3.6	54354	51928	57828	41014	-6.2	32.3
Nifty M50	16761	16357	2.5	16878	16215	17067	13270	-1.8	26.3
BSE METAL	31851	30402	4.8	32183	30107	34946	25884	-8.9	23.0
BSE CD	59534	57642	3.3	20362	19835	69044	49773	-13.8	19.6
BSE Power	6929	6712	3.2	6963	6635	8796	5670	-21.2	22.2
BSEOIL	27920	27054	3.2	27991	26794	33310	21950	-16.2	27.2
CNXBANK	57444	56253	2.1	57475	55779	57263	47703	0.3	20.4
BSE PSU	19867	19492	1.9	19937	19360	23019	15647	-13.7	27.0
BSE CG	71549	70243	1.9	71891	69759	76272	54568	-6.2	31.1
BANKEX	64556	63412	1.8	64620	62841	64359	54277	0.3	18.9
BSE Auto	53759	52934	1.6	53982	52242	62443	42834	-13.9	25.5
BSE HC	50531	49800	1.5	50531	49749	52662	42273	-4.0	19.5
BSEFMCG	20293	20023	1.3	45835	19835	24110	18197	-15.8	11.5
BSE IT	38060	38172	-0.3	38510	37482	45792	30458	-16.9	25.0
CNX IT	38823	38991	-0.4	39358	38279	46089	30919	-15.8	25.6
BSE Realty	7710	7872	-2.1	45835	19835	8907	5805	-13.4	32.8

Source: BSE, NSE.

Action By Market Participants:

FIIs Movement (Rs Crores)						
Date	Net Investment		Gross Purchase		Gross Sales	
	Eq	Debt	Eq	Debt	Eq	Debt
23-Jun-25	-1836	-48	8891	193	10727	241
24-Jun-25	-4337	-198	15207	415	19543	612
25-Jun-25	-854	-341	14988	237	15842	579
26-Jun-25	10663	614	29759	1857	19096	1242
s						
*FII's were net Buyer to the tune of Rs 47214.33 derivative segment from 23 June to 26 June 2025 as per the data released by SEBI.						
On 27, June 2025 FII's derivative were net Seller to the tune of Rs. -16270.4 as per the by NSE.						

Mutual Fund Movement (Rs Crores)

Date	Net Investment		Gross Purchase		Gross Sales	
	Eq	Debt	Eq	Debt	Eq	Debt
23-Jun-25	5196	-704	10732	13710	5536	14414
24-Jun-25	4468	512	11770	17956	7301	17444
25-Jun-25	1337	587	9187	10383	7850	9797

NRI (Rs Crores)

Date	Net Investment	Gross Purchase	Gross Sales
23-Jun-25	-12.16	18.02	30.18
24-Jun-25	-2.51	25.35	27.86
25-Jun-25	-4.18	24.78	28.96

Top Gainers & Losers

BSE (Group 100)

TOP GAINERS					
Scrip	Close 27/06/25	High	Low	Close 20/06/25	% Chg
ADANI ENTERPRISES LTD	2646.3	2681.6	2582.0	2448.4	8.1%
ADANI GREEN ENERGY LTD	1015.6	1046.9	993.0	947.7	7.2%
ADANI PORTS AND SPECIAL ECON	1440.2	1456.8	1427.0	1349.3	6.7%
ADANI POWER LTD	584.4	607.5	574.2	530.3	10.2%
AMBUJA CEMENTS LTD	575.0	579.8	565.1	533.5	7.8%
TOP LOSERS					
Scrip	Close 27/06/25	High	Low	Close 20/06/25	% Chg
YES BANK LTD	20.2	20.5	20.1	19.7	2.3%
WIPRO LTD	265.1	270.0	264.5	266.5	-0.6%
VEDANTA LTD	463.8	471.0	459.0	447.1	3.7%
VARUN BEVERAGES LTD	461.6	465.8	459.9	459.6	0.4%
FEED SPIRITS	1442.2	1461.0	1440.3	1458.9	-1.1%

NSE (NIFTY)

TOP GAINERS					
Scrip	Close 27/06/25	High	Low	Close 20/06/25	% Chg
ADANI ENTERPRISES LTD	2646.3	2681.6	2582.0	2448.4	8.1%
ADANI PORTS AND SPECIAL ECON	1440.2	1456.8	1427.0	1349.3	6.7%
APOLLO HOSPITALS ENTERPRISE	7308.5	7324.8	7106.0	7063.5	3.5%
ASIAN PAINTS LTD	2358.7	2365.0	2277.1	2285.7	3.2%
AXIS BANK LTD	1225.1	1247.0	1220.4	1220.7	0.4%
TOP LOSERS					
Scrip	Close 27/06/25	High	Low	Close 20/06/25	% Chg
WIPRO LTD	265.1	270.0	264.5	266.5	-0.6%
ULTRATECH CEMENT LTD	12213.0	12300.0	11917.0	11458.0	6.6%
TRENT LTD	6019.5	6159.0	5981.4	5897.5	2.1%
TITAN CO LTD	3666.2	3709.1	3658.1	3519.0	4.2%
TECH MAHINDRA LTD	1674.4	1701.8	1662.3	1696.1	-1.3%



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