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Weekly Market Overview

12.05.2025

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Global Market Overview

- Major US indices ended last week higher, with the S&P 500 up **0.2%** and NASDAQ gaining **0.5%**. Year-to-date, these indices are up around **4%** and **7%** respectively.
- European indices remained firm, and Hong Kong's Hang Seng index rose by **~2.5%**, reflecting improving global sentiment.
- Both US and Chinese officials signalled positive momentum in trade negotiations. A joint announcement regarding tariff reductions is expected soon, contributing to global market optimism.
- The US 10-year Treasury yield remained steady at **~4.40%**, indicating confidence in long-term economic stability.

Market Performance

NIFTY	~2.0%	↑
S&P 500	~0.2%	↑
NASDAQ	~0.5%	↑
Hang Seng Index	~2.5%	↑
Mid-Caps	~3.0%	↑
Small-Caps	~3.0%	↑

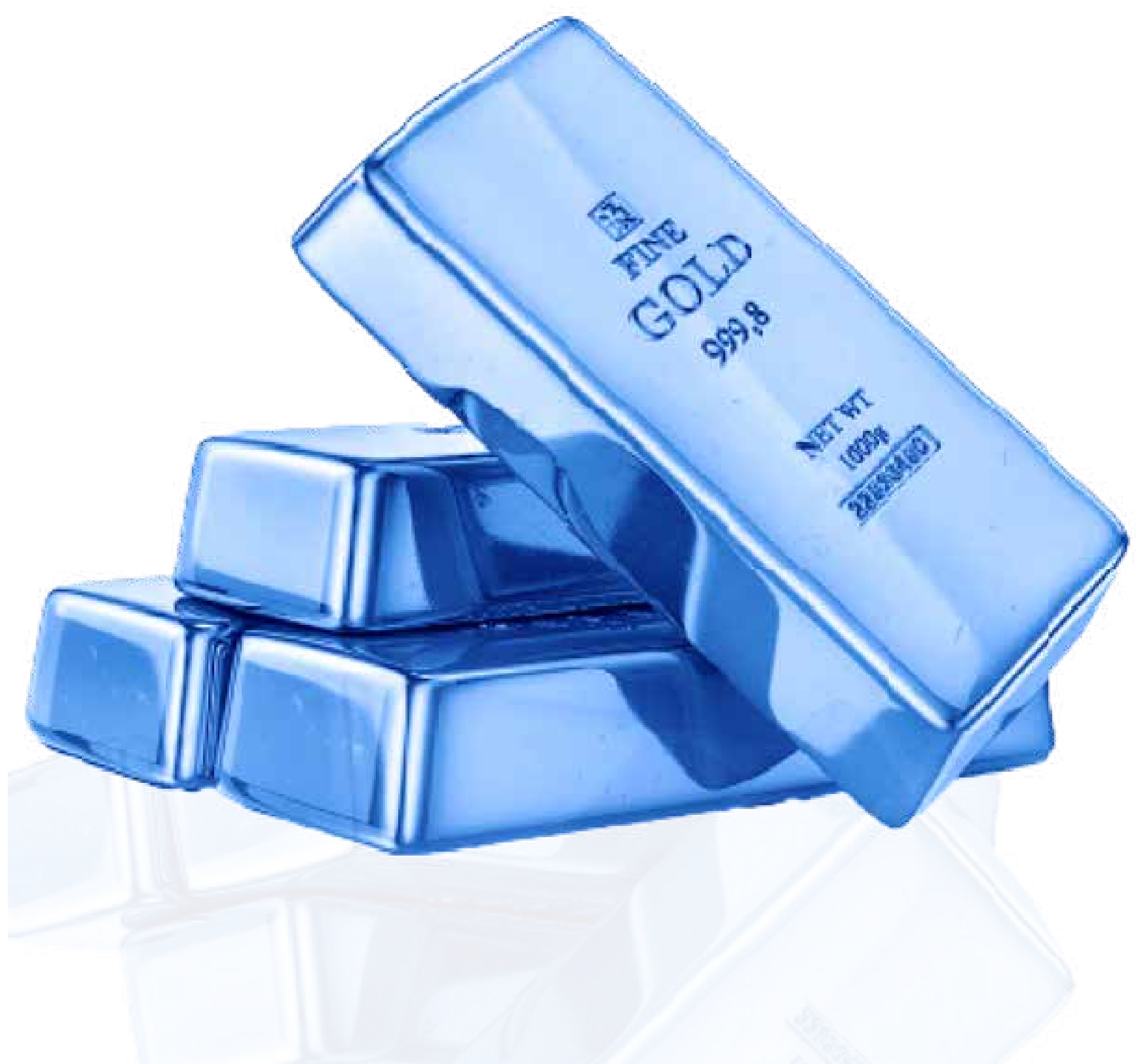
Indian Market Overview

- Indian equities started the week on a strong footing, with the Nifty gaining **~2%** today after last week's decline of **1.4%**, driven by geopolitical de-escalation and renewed investor optimism.
- The Mid-Cap index rose **~3%** today, recovering from a **1-2%** drop last week.
- Small-cap indices also advanced **~3%**, supported by broad-based buying interest.
- Foreign Institutional Investors (FIIs) remained net buyers over the past month, providing stability to the broader markets. The Indian rupee, which had strengthened to **~84** against the USD, has now depreciated slightly to **85.4**.
- The 10-year Indian government bond yield continues to trade stable at **~6.37%**, indicating firm domestic investor sentiment.

Gold Holds Strong at $2,270/oz

Safe-Haven Demand Fuels Rally Amid Global Uncertainty

- Cold prices remain elevated, currently trading near **$2,270/oz**, reflecting a year-to-date gain of around **25%** as investors continue to hedge against uncertainty.



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Brent Crude Recovers to $63-64

Oil Prices Rebound from Lows, But YTD Losses Persist

» Brent crude has recovered from recent lows of **~$60/barrel** and is now trading in the range of **$63-64/barrel**. However, it remains down **~15% year-to-date**.

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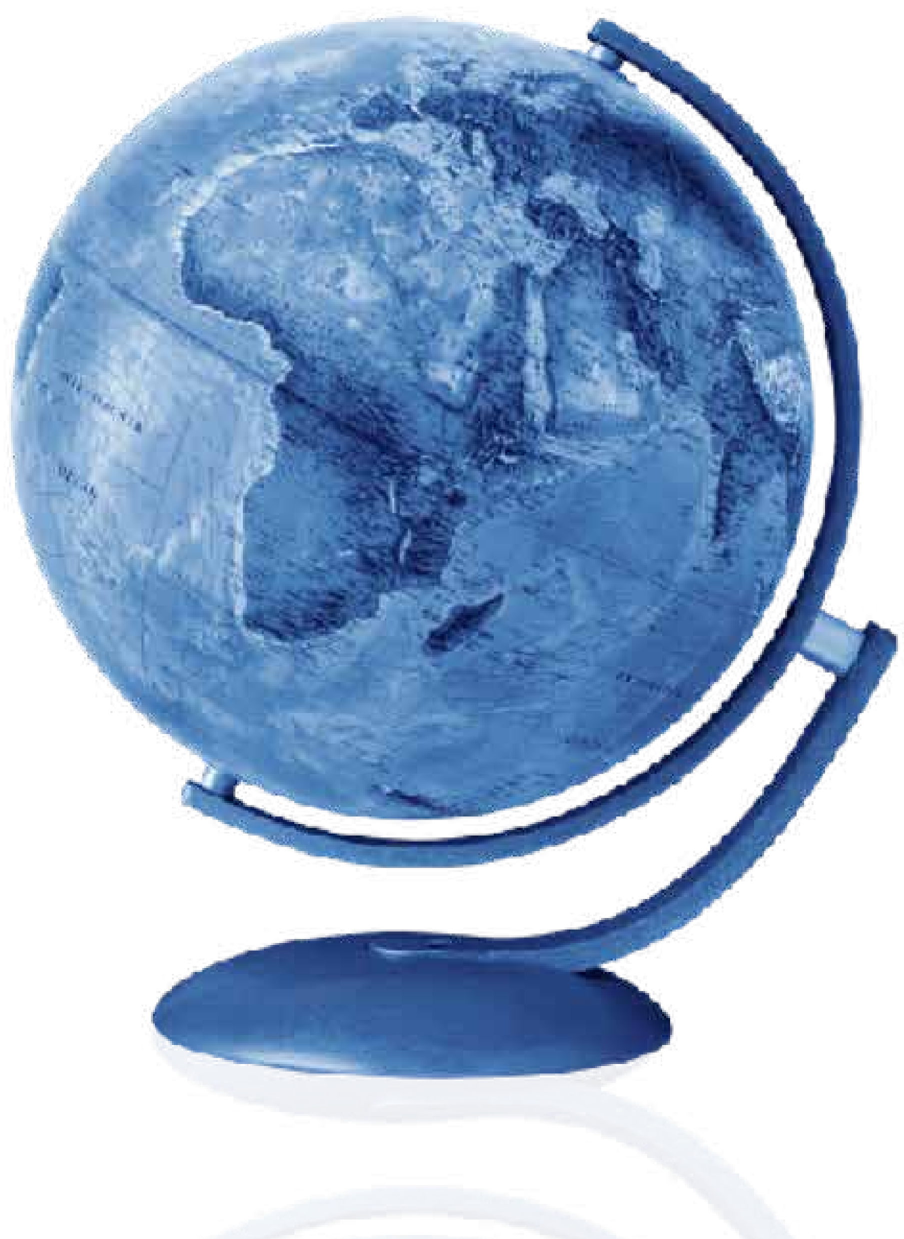
Ceasefire Eases Tensions, Lifts Markets

Gap-Up Openings Reflect Improved Risk Sentiment

- **India Pakistan Ceasefire:** The weekend ceasefire announcement and signs of regional de-escalation have brought temporary relief to markets, leading to gap-up openings and improved investor risk appetite.



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India's Defense Tech Gains Spotlight

AI and Precision Weaponry Boost Sector Confidence

» Emerging reports highlight India's advanced defence and manufacturing capabilities, particularly in precision weaponry and AI-led systems, potentially boosting long-term confidence in the defence and industrial sectors.

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