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Weekly Market Overview

19.05.2025

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Global Market Overview

- US markets posted strong gains last week, with the 500 rising **5.27%** and Nasdaq up **7.15%**.
- Key European indices rose **2-4%**, while Hong Kong's Hang Seng Index gained **2.1%**.
- Year-to-date, the S&P 500 is up **1.3%**, and Nasdaq is marginally negative at **-0.52%**.
- Nifty advanced **4.21%** for the week, continuing its upward trend.

  Broader markets outperformed: Midcaps gained **7.21%**, and Smallcaps rose **9.17%**.

  Year-to-date, Nifty is up **5.82%**, while Midcap and Smallcap indices remain in negative territory.

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Market Performance

NIFTY	~4.21% ↑
S&P 500	~5.27% ↑
NASDAQ	~7.15% ↑
Hang Seng Index	~2.10% ↑
Mid-Caps	~7.21% ↑
Small-Caps	~9.17% ↑

Indian Market Overview

- A sustained crude price correction may result in significant annual savings for India's import bill potentially up to **₹2.26 lakh crore** if prices remain around **USD 60/bbl**.
- The Indian Rupee remains stable, currently at **85.5** against the USD.
- 10-year Indian government bond yields are at **6.316%.**
- India may align with global trends and implement another **50—75 bps rate cut**, enhancing the attractiveness of fixed income.

Commodities & Currencies

Gold up 22%, Oil down 12% YTD

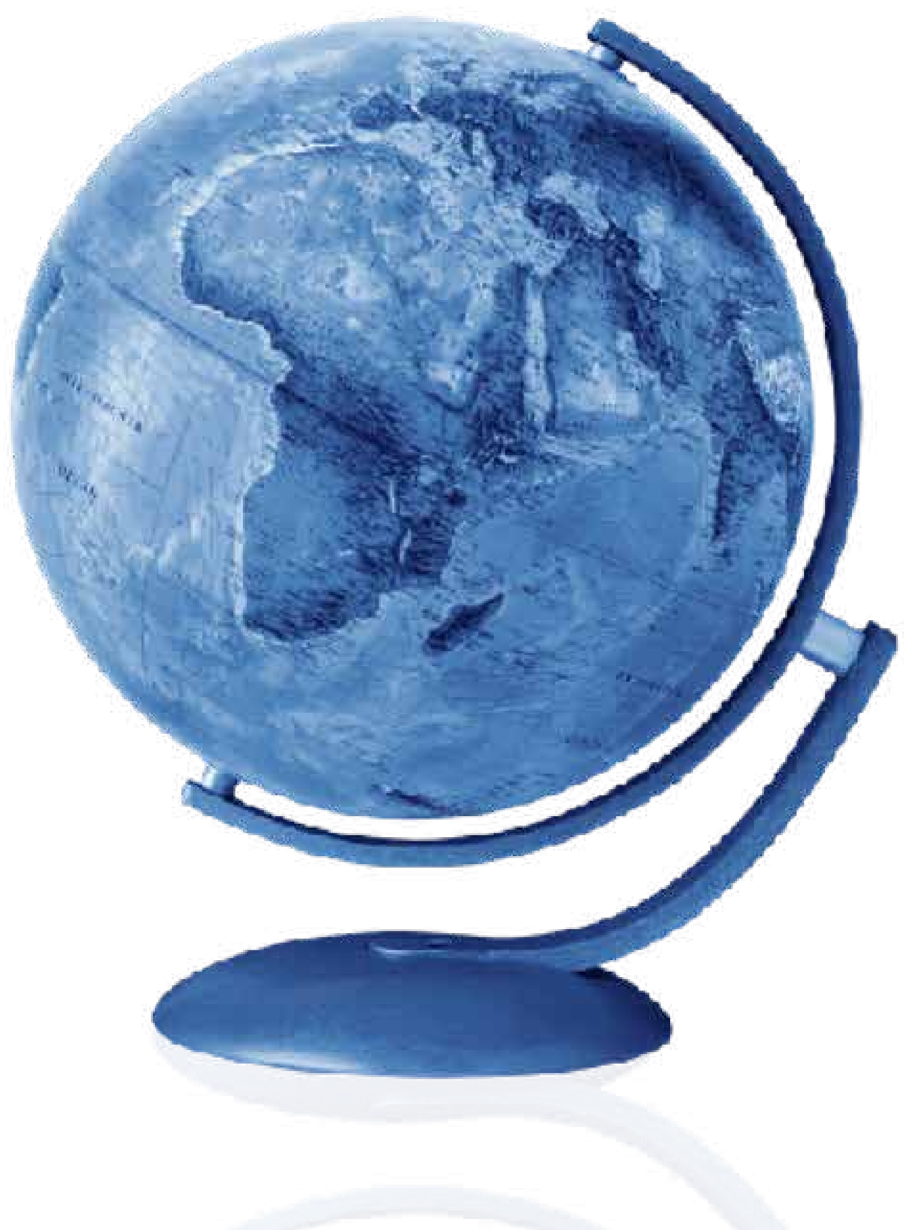
- Gold prices rose to **USD 3,202/oz**, reflecting a **~22%** gain YTD.
- Brent crude trades at **USD 65.4/bbl,** with a **~12%** YTD decline.

Foreign Investment Activity

Heavy FPI outflows, cautious April comeback

» In 2025 so far, FPIs have net sold equities worth over **₹93,731 crore**.

» However, April saw net positive inflows of **₹4,223 crore**, indicating selective re-entry.



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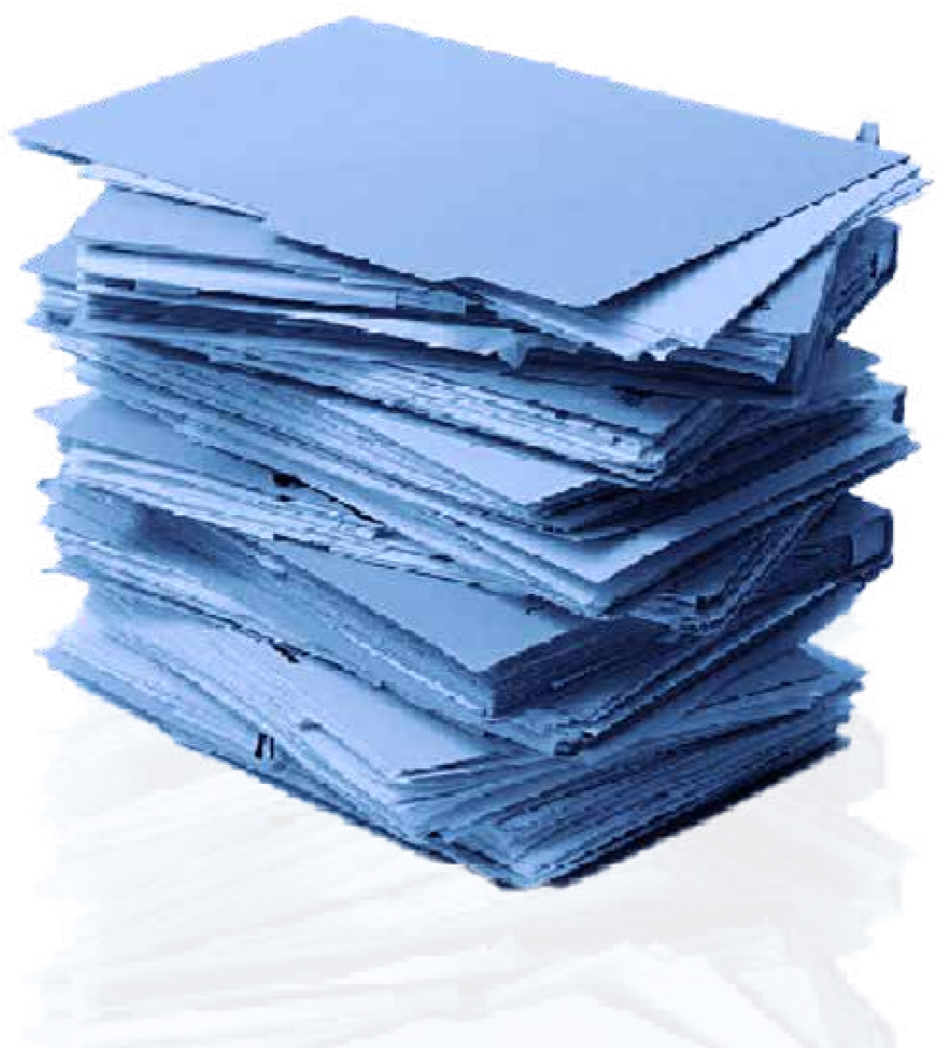
Macro Economic & Earnings Trends

Core inflation steady, spending soft

- Core inflation (excluding food and energy) remains moderate.
- Despite higher tariffs, prices for affected goods (e.g., automobiles, apparel) rose modestly, suggesting cost absorption by businesses.
- Weakness in services (travel, recreation) hints at reduced discretionary spending.



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