



Rise. With Confidence.

Weekly Market Overview

02.06.2025



Global Market Overview

- » US equity markets saw positive momentum last week, with the S&P 500 gaining **1.88%** and Nasdaq up **2.01%**.
- » European markets advanced modestly, with key indices rising between **0.5%** to **1.25%**.
- » Asian equities showed weakness, with the Hang Seng Index declining **1.3%**.
- » Indian equities remained largely flat; the Nifty was down **0.41%**, while Mid-Cap and Small-Cap segments posted gains of **1.3%** and **1.36%**, respectively.

Market Performance

NIFTY	~0.41%	↓
S&P 500	~1.88%	↑
NASDAQ	~2.01%	↑
Hang Seng Index	~1.30%	↓
Mid-Caps	~1.30%	↑
Small-Caps	~1.36%	↑

Commodities & Currencies

Commodities Contrast, Currency Holds

- » Gold has shown strong performance, closing at **\$3,289/oz**, up **25.4% YTD**.
- » Brent crude is trading at **\$62.8/bbl**, reflecting a **16% YTD** decline.
- » The Indian Rupee is trading at **85.5** against the US Dollar



Fixed Income & Interest Rates

Yields diverge as EMs outperform

- » US 10-year Treasury yields closed at **4.397%**.
- » India's 10-year government bond yield eased to **6.20%**, down from a peak of **7.45%**, marking a 125 basis point decline.
- » G7 bond markets face sustained pressure due to rising deficits, increased interest costs, inflation expectations, and elevated supply.
- » Emerging market local currency bonds continue to outperform, with Bloomberg's EM index delivering **44%** outperformance over G7 bonds in USD terms since March 2020.



Macro & Policy Environment

Growth surprises amid global caution

- » India's Q4 FY25 GDP rose **7.4%** YoY, exceeding the consensus estimate of **6.7%**.
- » Businesses globally remain cautious, with “uncertainty” emerging as a key deterrent to capital investment.
- » In the US, tariff threats have become frequent and short-lived, with recent actions suggesting a universal **10%** tariff under consideration.



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