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Weekly Market Overview

06.10.2025

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Global & Domestic Market Trends

- US markets ended higher last week; the S&P 500 gained **~1%**, NASDAQ **+1.3%**. Markets continue to show resilience with tech-led gains.
- Year-to-date returns: S&P 500 **~14%**, NASDAQ **~18%**, indicating strong recovery momentum.
- European markets rose **~4%**, reflecting global optimism despite ongoing macro uncertainties.

Market Performance

NIFTY	~0.34%
S&P 500	~0.01%
NASDAQ	~0.28%
Hang Seng Index	~0.89%

Domestic Market Highlights

- Nifty closed **+1%** last week; Mid-cap **+2%**, Small-cap **+1.8%**. Mid-cap and small-cap indices remain volatile but are showing selective opportunities.
- Year-to-date: Nifty **+5%**, Mid-cap flat, Small-cap **-5%**, highlighting the relative strength of large-cap stocks.

Investment Flows

- Foreign Institutional Investors (FIIs) recorded outflows of **~$2B** in September; cumulative net outflows in 2025 stand at **~$17.5B**.

- Domestic Institutional Investors (DIIs) recorded inflows of **~$7.5B** in September; YTD inflows **~$66B**, supporting market stability despite FII outflows.

  Historical comparison: FIIs were net sellers of **~$1B** same period last year, showing increased global caution.

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Commodity Updates

Precious metals soar as oil cools

- Gold reached record highs **(~$1,380/oz)**, up **~48% YTD**, fueled by a weak dollar and central bank purchases.
- Silver at **~$38/oz**, up **~66% YTD**, reflecting similar safe-haven demand.
- Crude oil prices eased to **~$64.5/barrel**, reflecting anticipation of higher supply in November from OPEC.

Interest Rates & Currency

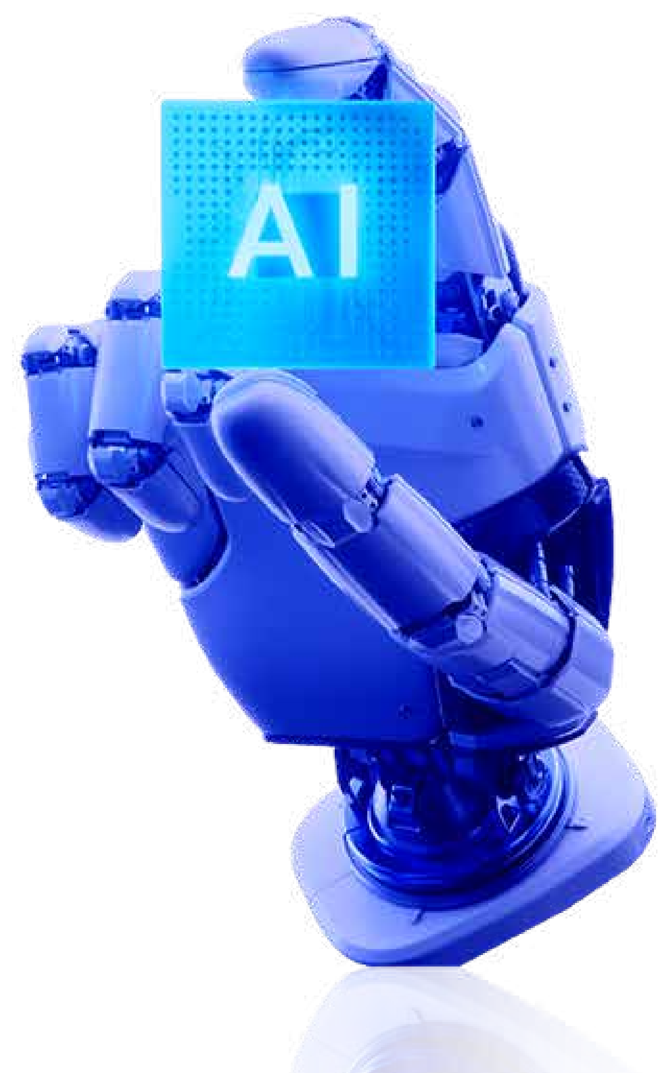
Bond yields steady, rupee remains resilient

- US 10-year yield stable at **4.12%**; Indian 10-year yield eased to **~6.49–6.50%**, indicating slightly lower borrowing costs domestically.
- INR trading at **88.7**; relative stability supports investor confidence in foreign capital flows.

Technology & AI Capex Trends

AI drives record tech capex surge

- Tech giants continue significant capital expenditure **(~$500B projected)** to support AI infrastructure, signaling long-term growth potential.
- Non-tech sectors show stable capex, suggesting broader economic investment remains steady.



Fixed Income Outlook

Yield curve normalizes, debt stays appealing

- US yield curve normalized: short-term rates, long-term **~4.5%**, providing better alignment for investors.
- High-yield fixed income remains attractive; recommended allocation **~35%** of portfolio for risk-adjusted returns.
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