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Weekly Market Overview

25.08.2025

Global Market Overview

- US markets ended with mixed last week SPX gained **0.27%.** Key European indices gained almost **1%-2%.** Hang Seng Index was up **0.27%.** Nasdaq was down **0.58%**. YTD, SPX is up **10%**, Nasdaq is up **11.3%**.
- Nifty ended higher last week. Nifty was up **0.97%** last week. Mid cap index gained 2% and Small cap index closed **2.1%** higher.
- YTD, Nifty is up **5%**, Mid Cap is **0.75%** up and Small Cap is down **4.5%**.

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Market Performance

NIFTY	~0.97% ↑
S&P 500	~1.52% ↑
NASDAQ	~0.58% ↓
Hang Seng Index	~0.27% ↑

Commodities & Currencies

Markets sway amid trade and policy shifts

- **Gold:** Closed at **$3,372/oz**. YTD gold is already up **~30%** – expected to rally further amidst macro uncertainty.
- **Crude Oil (Brent):** Brent Oil now trades at **$67.2/bbl.** Now, YTD oil is down **10%**.
- **Currency (USD/INR):** INR trades at 87.33 against the USD.
- **Bond Yields:** India 10yr GOI bond yield ended at **6.55%** last week: Worries about increased bond supply with upcoming GST rationalization led to the sell off.

Domestic Buying Surge

DIIs counter FPIs with record inflows

- DIIs invested $80B in the past year, offsetting **$40B** in FPI outflows.
- DII buying far exceeds past crises, including 2008 and 2022 sell-offs.
- April–June saw FPI inflows of **$1.2–2.3B**; July reversed with **$2.9B** outflows, continuing in August.
- In July 2025, FPIs pulled **$2.9B** from India, while Taiwan **($18.3B)**, Japan **($16.1B)**, and South Korea **($4.5B)** saw strong inflows.

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