



Monthly Newsletter

July 2025



June 2025 Performance

Nifty 50 25,517.05 3.1%	BSE Sensex 83606.46 2.6%	Mid Cap 46854.46 3.8%	Small Cap 54690.91 4.3%	Gold 3307.70 -2.6%
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Market Recap June 2025

The Nifty continued its upward momentum, gaining 3.1% in June 2025, following 3.5% in April and 1.7% in May—a strong trend despite ongoing macroeconomic headwinds.

Foreign Portfolio Investors (FPIs) displayed mixed sentiment during the month. While ₹14,590 crore flowed into equities, there was significant selling in debt markets amounting to ₹22,153 crore, leading to net FPI outflows of ₹7,563 crore in June.

A key trigger ahead is whether India can finalize the proposed trade deal before July 9, 2025, though multiple unresolved issues remain.

On the positive side, the RBI delivered a 50 bps rate cut in June, along with a 100 bps reduction in the Cash Reserve Ratio (CRR) to enhance system liquidity.

Adding to the optimism, India posted a current account surplus of \$13.5 billion in Q4FY25, bringing the full-year FY25 Current Account Deficit (CAD) down to just 0.6% of GDP—a sign of macroeconomic stability.

37 out of 50 Nifty stocks ended June in the green, marking a strong finish for the benchmark index, which posted gains for the fourth consecutive month.

Jio Financial Services led the rally, emerging as the top Nifty 50 gainer with a 14% surge, fueled by multiple positive developments that spurred investor interest.

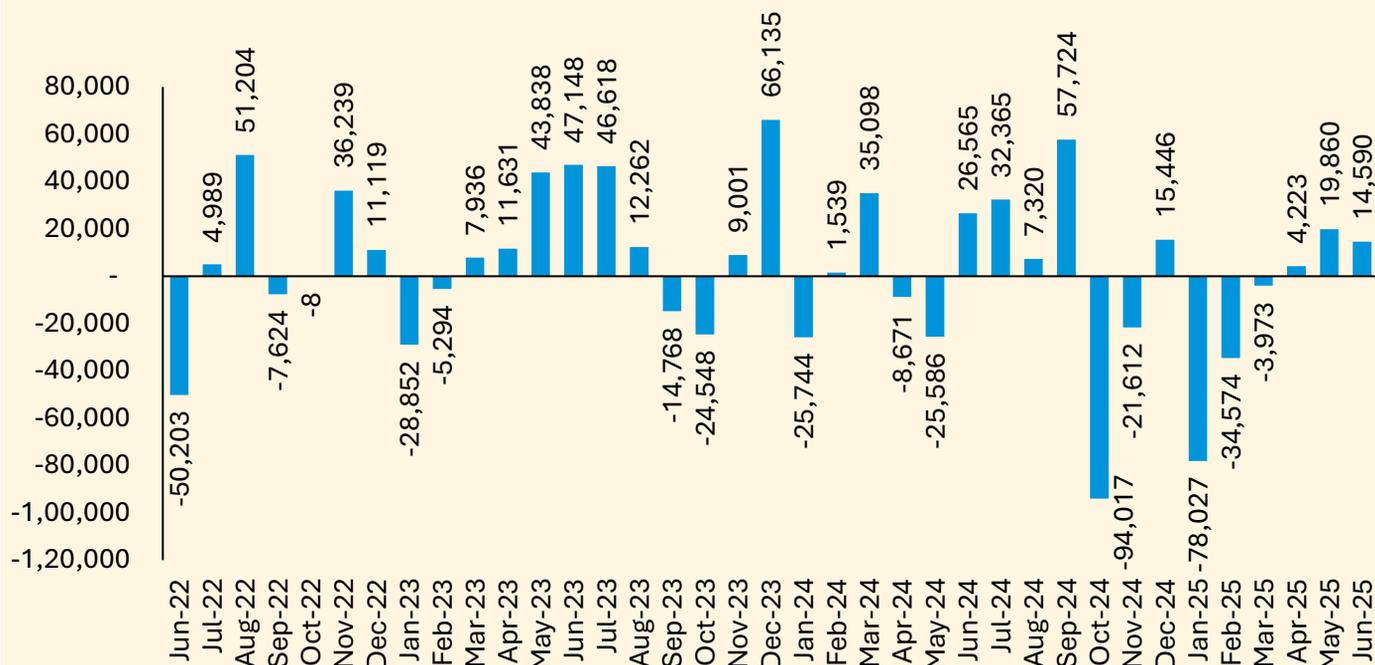
Zomato followed with a 10% jump, as investors remained confident in the company's ability to navigate intensifying competition in both food delivery and quick commerce.

Grasim Industries staged a solid recovery, advancing nearly 7%, while Trent extended its winning streak for the third straight month, adding another 10% to its ongoing rally.

Bharti Airtel also stood out, delivering 8% gains and crossing the ₹2,000 milestone for the first time.

Amid rising speculation that former President Trump might extend the pause on trade penalties, he dismissed such reports over the weekend. On Sunday, he clarified that there are no plans to extend the 90-day suspension beyond the July 9 deadline set for trade negotiations. He further stated that his administration will begin notifying countries that trade penalties will be imposed unless agreements are finalized.

FPI Investment Into Equity (In ₹ Crore)



Source: NSDL

➤ Indian Pharma Eyes US Generics Windfall

India's pharmaceutical sector is set to benefit from a **\$63.7 billion US patent cliff** between 2025–29, opening massive opportunities in generics. A broader **\$180 billion global Loss of Exclusivity (LoE)** by 2035 further strengthens the outlook.

With **750+ USFDA-approved plants**, rising exports, and proven strength in complex generics and biosimilars, Indian players are well-positioned to lead the next wave of affordable, high-quality drug supply.

Key Moves:

- **Cipla** sharpens focus on respiratory and PEPFAR products.
- **Lupin** gears up for Etanercept's US launch by 2029.
- **Sun Pharma** expands oncology pipeline with **UNLOCKXYT** and ties up with Philogen for immunotherapy.

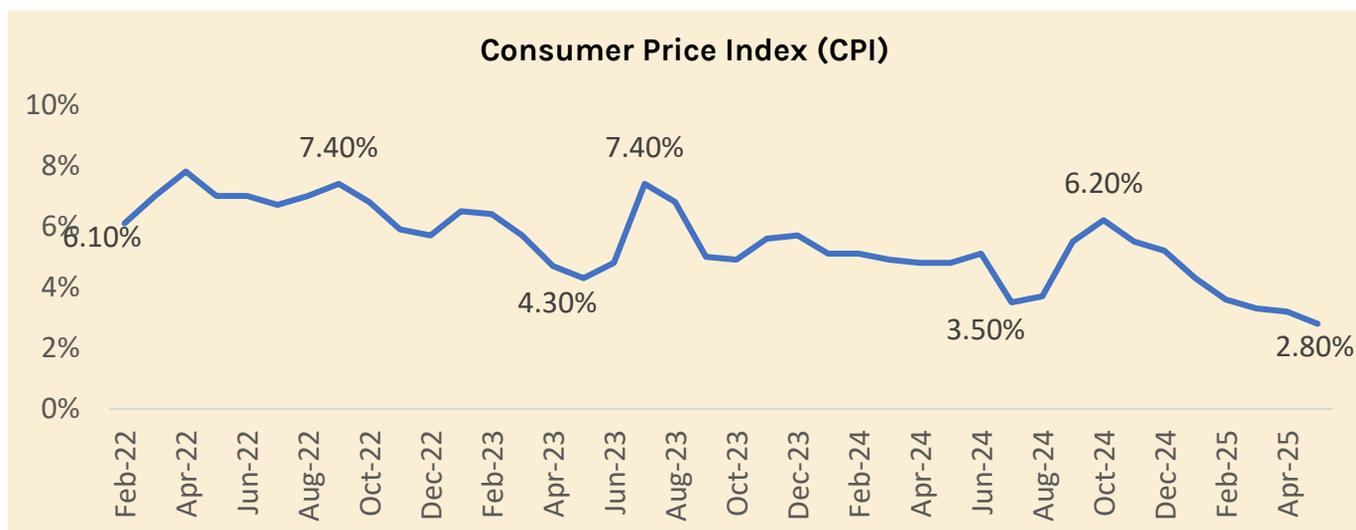
Global giants like Teva and Viatriis are scaling back, leaving room for Indian firms to fill the gap. A shift from volume to value is visible as companies prioritize **quality, compliance, and margin protection**.

With regulatory headwinds easing and supply chains getting leaner, Indian pharma is ready for its next global leap.

➤ WPI



➤ CPI



Source: MoSPI

- Wholesale Price Index (WPI) cooled to a 14-month low of 0.4% YoY in May 2025, down from 0.9% YoY in April 2025, led by a sharp drop in food inflation (-1.6% YoY).
 - This decline was primarily due to a significant fall in vegetable prices (-21.6%) and pulses (-10.4%), partially offset by inflation in milk (+2.7%) and cereals (+2.6%).
- Consumer Price Index (CPI) eased further to a 75-month low of 2.8% YoY in May 2025, compared to 3.2% YoY in April 2025.
- Consumer Food Price Index (CFPI) growth moderated to 1.0% YoY in May 2025 from 1.8% in April, driven by a continued fall in vegetables (-13.7%) and pulses & products (-8.2%).
- Retail inflation remained below the RBI's long-term target of 4% for the fourth consecutive month, reinforcing a disinflationary trend.

June Rally Fueled by Mid & Small Caps, Sectoral Breadth Stays Positive



Script Name	Current Rate	30 D % Change
Top 5 NIFTY Gainer		
JIOFIN	330.2	14.0
GRASIM	2,865.0	11.7
ETERNAL	260.9	10.8
SHRIRAMFIN	696.1	10.6
TRENT	6,137.0	10.2
Top 5 NIFTY Losers		
TATAMOTORS	683.8	-4.4
BAJAJ-AUTO	8,395.0	-2.7
HINDUNILVR	2,298.0	-2.3
HEROMOTOCO	4,229.0	-1.7
COALINDIA	389.5	-1.4

INDEX	30 June 2025	30 D % Change
NIFTY IT	38,833.2	4.4
NIFTY HEALTHCARE INDEX	14,494.2	4.1
NIFTY REALTY	984.2	3.9
NIFTY METAL	9,564.6	3.7
NIFTY OIL & GAS	11,858.8	3.6
NIFTY PSU BANK	7,253.6	3.3
NIFTY CONSUMER DURABLES	38,508.5	2.9
NIFTY PHARMA	22,041.3	2.8
NIFTY MEDIA	1,731.4	2.5
NIFTY PRIVATE BANK	28,289.0	2.5
NIFTY AUTO	23,824.0	2.3
NIFTY FMCG	54,503.0	-0.7

Source: NSE

Particular	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25
Nifty 50	-0.2%	2.9%	4.0%	0.8%	1.9%	-6.1%	-0.7%	-2.1%	-0.6%	-6.0%	6.0%	4.3%	1.7%	3.1%
Nifty Midcap 50	1.6%	5.1%	5.8%	-0.7%	1.2%	-8.2%	0.4%	1.7%	-6.5%	-9.9%	7.4%	5.2%	4.5%	5.3%
Nifty Smallcap 50	-2.2%	6.9%	4.0%	2.0%	-0.1%	-2.7%	-1.0%	-0.6%	10.0%	12.0%	8.5%	3.0%	7.8%	7.3%
Nifty 500	0.4%	2.9%	4.2%	0.5%	1.7%	-6.4%	-0.5%	-1.4%	-3.6%	-8.1%	7.0%	3.8%	3.5%	3.6%

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