FINKHOZ ROBOADVISORY PVT LTD

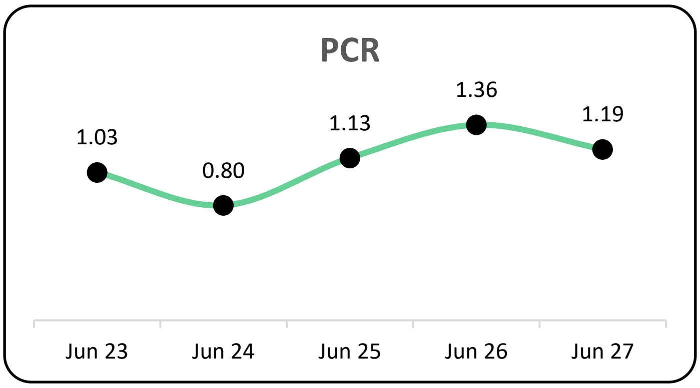
Weekly Market Update

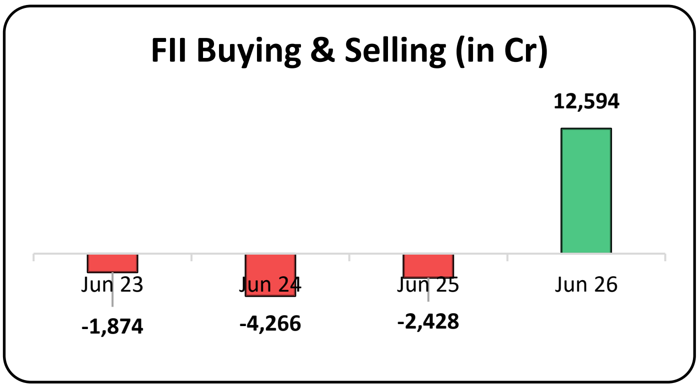
June 27th, 2025

Executive Summary

Between June 23rd and 27th, Nifty opened weak due to Middle East tensions and rising oil prices but rebounded mid-week as global sentiment improved. The recovery was supported by easing geopolitical risks and strong buying in tech, banking, and metal stocks. The week closed on a strong note, driven by the RBI's surprise rate cut and liquidity boost, which lifted banks, realty, and midcaps.

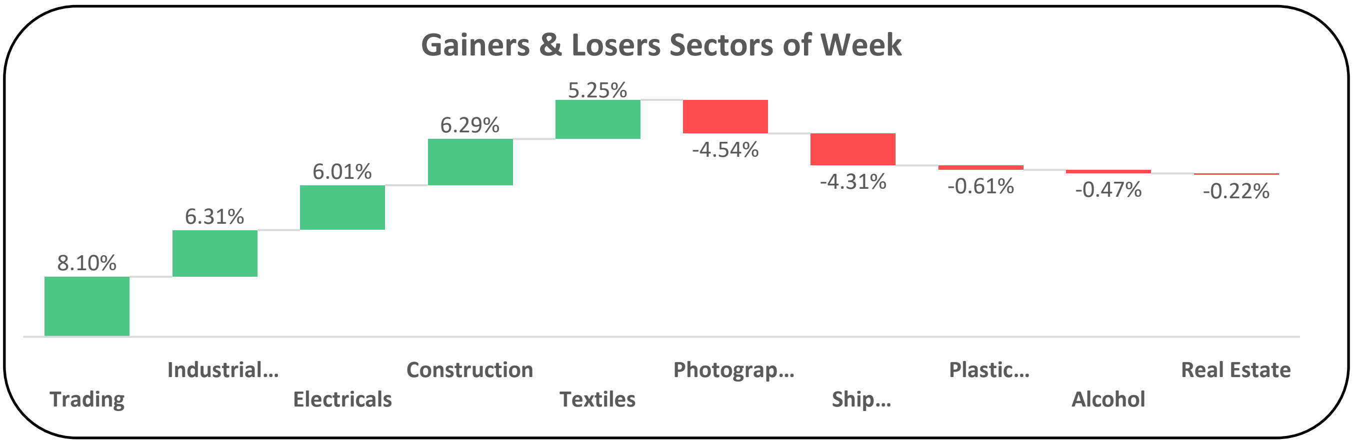
Market Performance Overview



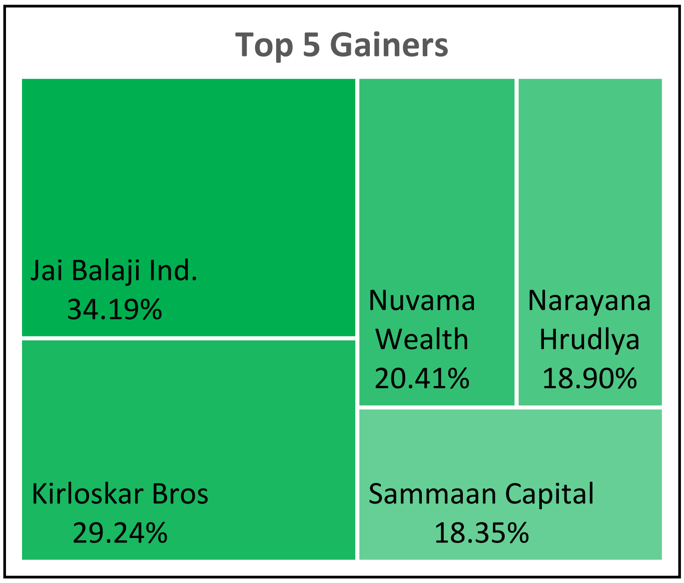


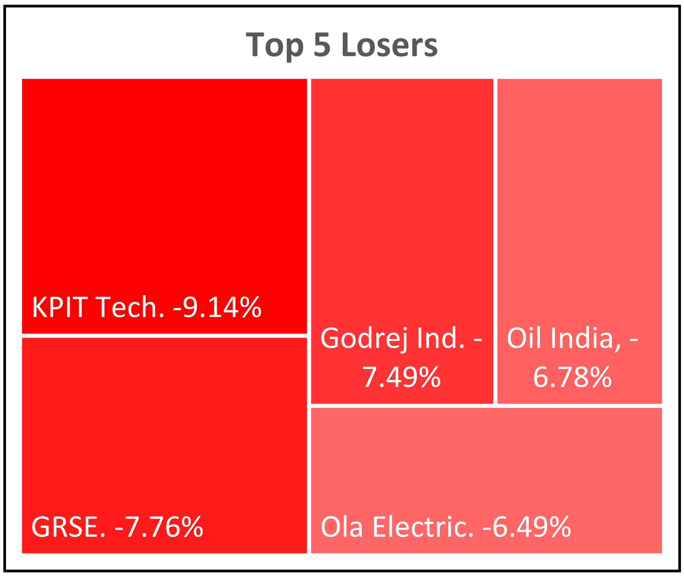
Sector Highlights

- **Metals:** Metals led the charge, gaining about 1%, boosted by a softer U.S. dollar and easing geopolitical tensions
- **IT & Auto:** IT, auto, and consumer durables saw strong performance mid-week as markets reacted positively to a temporary ceasefire in the Middle East
- **Banking and Financial:** Banking had a mixed week—PSU banks led gains on Friday, but financials showed signs of profit booking later in the session
- **Energy:** Oil & gas / energy firms rallied along with crude prices, providing support to the broader market
- **Realty and Media:** Realty stocks continued their upward trend, reflecting ongoing confidence and sector rotation. Media stocks also contributed positively, with notable gains alongside metals.



Key Stock Movements: Gainers & Losers





Macroeconomic Factors: Top Headlines

- Projected growth of **6.4% in FY 2025–26** with slight acceleration to **6.7% in FY 2026–27**, driven by government capex despite low income and youth job growth
- Domestic inflows, macro fundamentals, and strong performance of blue-chip stocks are pushing the index near its all-time high
- BSE mid- and small-cap indices up; DIIs remain buyers amid Middle East ceasefire easing volatility
- Asian shares were mostly higher on Friday after U.S. stocks ran up to the edge of another record. U.S. futures and oil prices also logged slight gains.
- The central bank in June announced a surprise 100-basis-point reduction in the cash reserve ratio, the portion of deposits banks must park with the RBI, in four equal tranches beginning September, lowering it to 3%, to boost policy transmission.
- INR firmed to ₹85.82/USD amid easing geopolitical tensions, U.S. yield dip, and RBI's VRRR announcement.
- RBI's holdings in government bonds surged to ₹14.88 trn (~12.8% of total issuance) by March end, up from 10.5% in December, driven by net Open Market Operations of ₹2.4
- The yields on small savings schemes including PPF are due for a rate review (June 30), potentially falling below 6.5%, reflecting lower bond yields and repo cuts.

Market Outlook: Upcoming Week 30th June – 4thth July

Week Range Low/High	24,824-25,654
Current Level	25,637
Support Level	25,340
Resistance Level	25,900–26,000
Current PCR	1.19

Market Outlook: The Nifty 50 index continues to show strength, closing the week on a positive note and maintaining its upward trend. It is currently trading above both short-term exponential moving averages, reflecting solid bullish momentum.

- **Downside Watch:** If Nifty doesn't cross the 25,900–26,000 resistance, some profit booking may happen. Support is around 25,300–25,400, and if it slips below this range, the index might move sideways for a while. However, the overall trend remains positive unless there's a sharp fall.

- **Upside Watch:** If Nifty breaks above the 25,900–26,000 zone, it could trigger a fresh rally toward new highs. Holding above the 25,300–25,400 support range may offer buying opportunities on dips, supported by strong global or domestic cues.

- ***Note**: All levels and strategies are based on current market data and are subject to change. It's essential to stay updated with real-time market movements and adjust strategies accordingly*.

- **Disclaimer:** *This is not a recommendation. Investing in securities is subject to market risks. Please read all related documents carefully and consult a financial advisor before investing.*