

Weekly Market Update

Date – (7th July 2025 to 11th July 2025)

Market Overview

Indian equity markets exhibited a cautious and volatile trend during the week, largely influenced by developments around the U.S.–India trade deal. Early in the week, markets fluctuated between minor gains and losses as investor sentiment remained subdued due to uncertainty over potential U.S. reciprocal tariffs and strong U.S. jobs data, which dimmed hopes of an imminent interest rate cut by the U.S. Federal Reserve. The postponement of the 25% tariffs by the U.S. offered temporary relief, fueling a modest rebound, with investors hopeful about constructive progress in bilateral trade talks.

However, the optimism was short-lived as markets declined in the latter half of the week, especially after the U.S. President escalated trade tensions by intensifying tariff threats. Despite reassurances from both sides regarding ongoing negotiations, the absence of a finalized trade agreement weighed on investor confidence. Concurrently, caution prevailed ahead of the Q1FY26 earnings season, as participants awaited signs of corporate recovery after multiple weak quarters. Overall, the week ended on a negative note, with equities under pressure from both global trade uncertainties and domestic earnings concerns.

As a result, the BSE Sensex fell by -1.11%, closing at 82,500, while the Nifty 50 declined by -1.15%, settling at 25,149

Market Summary > NIFTY 50

25,149.85

-292.10 (-1.15%) ↓ past 5 days

11 Jul, 3:31 pm IST • Disclaimer



Market Summary > BSE SENSEX

82,500.47

-925.91 (-1.11%) ↓ past 5 days

11 Jul, 3:30 pm IST • Disclaimer

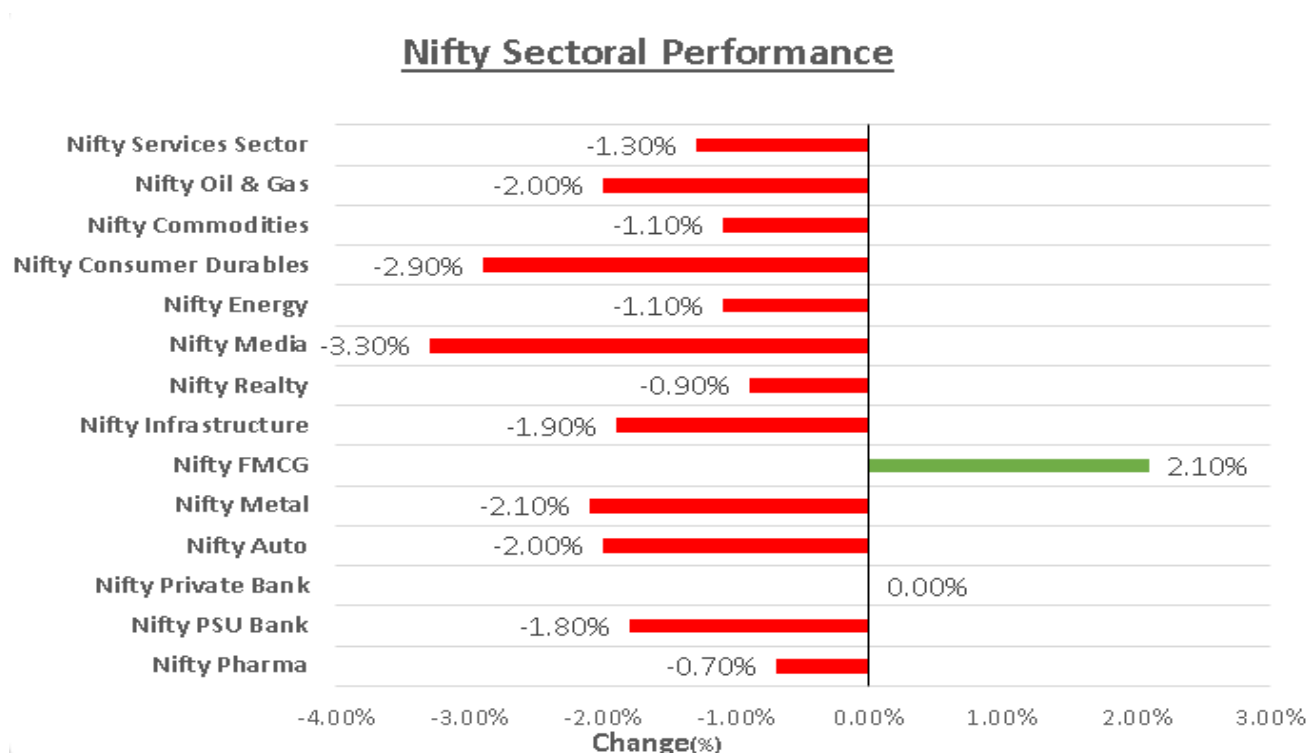


Institutional Investment Trends

Foreign Institutional Investors (FIIs): Net outflows of ₹14,975 crore

Domestic Institutional Investors (DIIs): Robust net inflows of ₹ 20,693 crore

Sectoral Highlights: Leaders & Laggards



Sectors that Increased: Reasons for Gains

➤ Nifty FMCG (+2.10%):

Reason: This is the only sector showing positive performance. FMCG often perform well during uncertain economic times because they deal with essential everyday products for which demand remains relatively stable even when discretionary spending decreases. This makes them a defensive play for investors.

➤ Nifty Bank (0.00%)

Reason: This sector shows no change, indicating a relatively stable performance. It suggests that private banks are holding their ground, neither significantly gaining nor losing, possibly balancing out positive and negative market forces.

Sectors That Declined: Reasons for Losses

➤ Nifty Media (-3.30%)

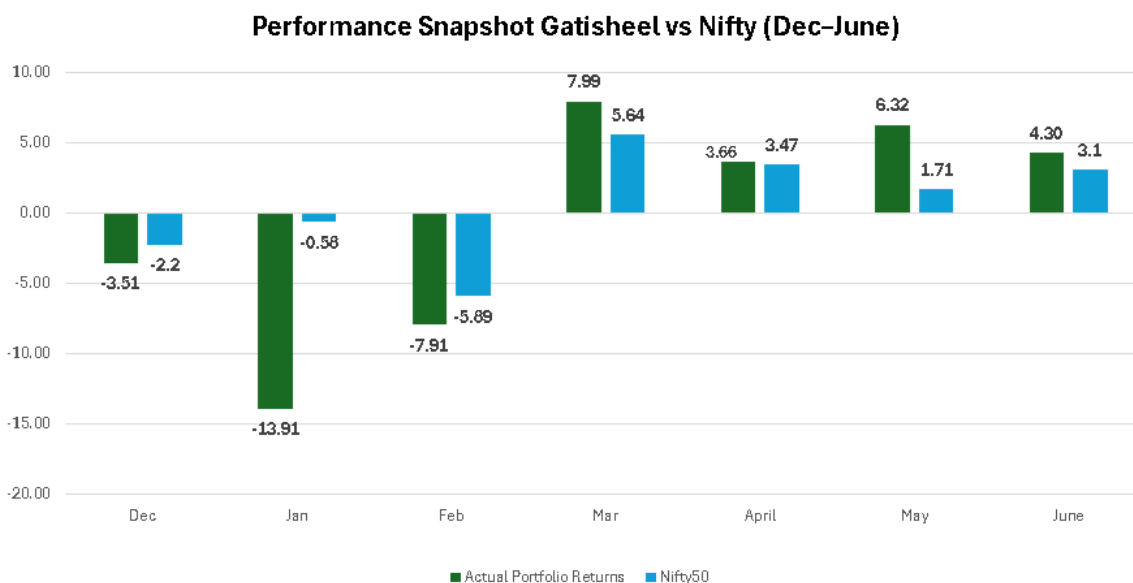
Reason: This sector shows a significant negative change. This could indicate a decrease in advertising revenue, lower subscription rates, or a general slowdown in media consumption or discretionary spending on entertainment.

➤ Nifty Metal (-2.10%)

Reason: A negative performance here often correlates with a slowdown in industrial activity or construction, as demand for metals (steel, aluminum, etc.) is heavily tied to these sectors. Falling commodity prices globally could also be a factor

Portfolio Performance Update

Here's a monthly performance snapshot of our Provitt **Gatisheel Stock Basket**, benchmarked against the Nifty 50 index. We follow a disciplined investment strategy by rebalancing the basket every month and selecting stocks with a market capitalization above ₹1,000 crore, focusing on quality and consistency in performance.



Gainers & Losers of the Week

Top Gainers		Top Losers	
Stock Name	Return (%)	Stock Name	Return (%)
Force Motor	+13.26%	Aster DM Healthcare	-10.65%
IIFL Finance	+12.64%	Endurance Tech	-5.69%
SBFC	+7.28%	Axis Bank	-5.28%

Our Mutual Fund Model Portfolio

Performance Overview

Objective	Asset Allocation	Portfolio Age	XIRR (%) May	XIRR (June)
Wealth Creation	94% Equity, 6% Debt	9 Y 11M	22.82	23.56
Wealth Creation	90% Equity, 10% Debt	8 Y 1M	23.13	24.27
Education	80% Equity, 20% Hybrid	8 Y 4M	24.50	25.15
Retirement	70% Equity, 30% Debt	6 Y 11M	18.65	19.31
Wealth Creation	93% Equity, 7% Debt	9 Y 9M	18.23	18.80

Key Insights

- All portfolios saw positive growth in June 2025
- The Education portfolio delivered the highest return (25.15%) with a balanced equity-hybrid strategy.
- Wealth Creation portfolios with higher equity allocations also performed strongly.
- The Retirement portfolio, with the most conservative mix, showed stable but comparatively modest returns.

Takeaways for Investors

- High Equity Exposure continues to yield superior long-term results.
- Regular monitoring and slight rebalancing can enhance performance.
- Diversification (e.g, hybrid components in Education/Retirement) supports risk management with competitive returns.

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