



Ckredence™
Wealth

Your Journey to Prosperity

SEBI Regn No. INP000007164



A New World Of
Opportunities & Growth

Market Landscape Jun' 25

— Formerly Chirag Investment Since 1987 —

KEY INDICES PERFORMANCE (Jun`2025)

Indices	Opening	Closing	1M%Chg	1Y%Chg
Nifty 50	24,750.70	25,517.05	3.10%	6.27%
BSE 500	35,815.16	37,043.16	3.43%	3.95%
Nifty Mid Cap 100	57,420.00	59,741.20	4.04%	7.18%
Nifty Small Cap 100	17,883.30	19,075.10	6.66%	4.13%

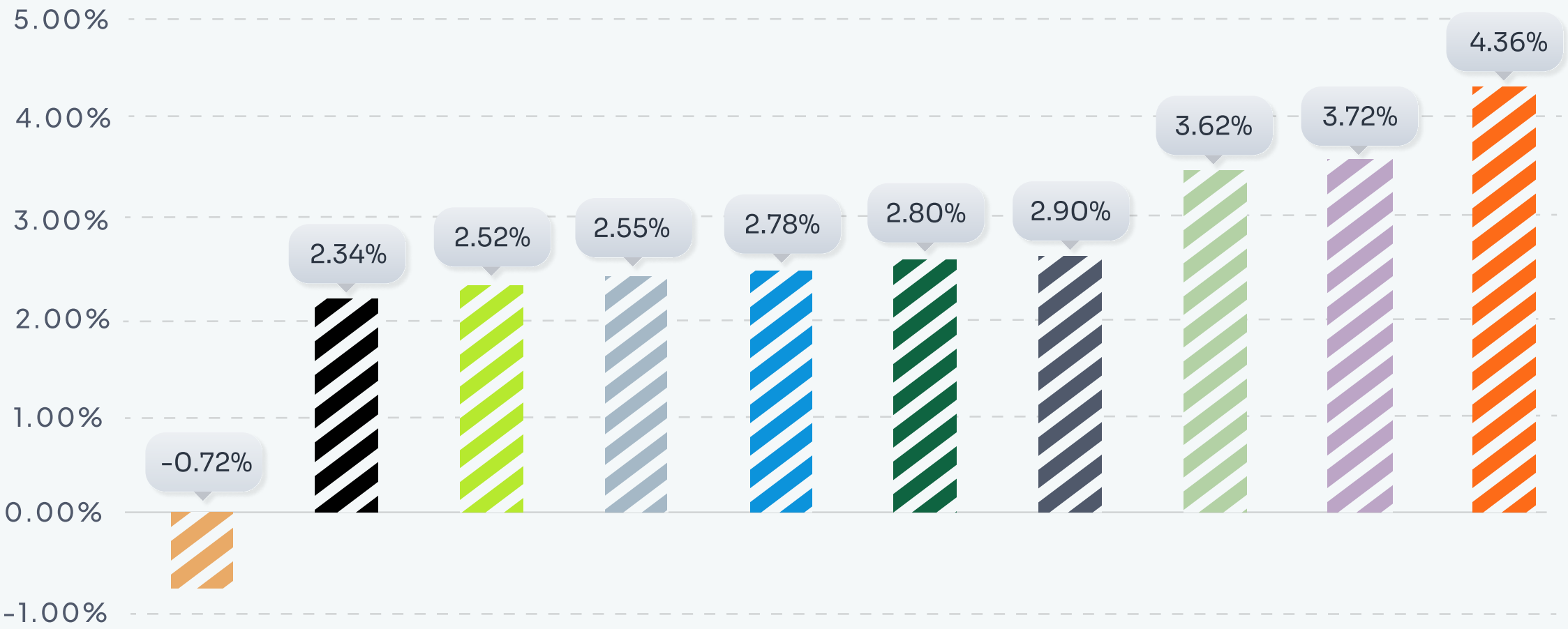
Source: investing.com

NSE SECTOR INDICES MONTHLY RETURN

NSE Sector Indices

Monthly returns

-  Nifty FMCG
-  Nifty Auto
-  Nifty Media
-  Nifty Financial Services
-  Nifty Pharma
-  Nifty Bank
-  Nifty Consumer Durables
-  Nifty Oil & Gas
-  Nifty Metal
-  Nifty IT



Source: investing.com

NIFTY 50 P/E

Current PE	FY26E
22.97	21.62
Source : Ckredencewealth.com	

(Data as on 30th Jun)

FII & DII ACTIVITY

(Rs Cr)	MTD	QTD	YTD
FII	₹ 7,488.98	₹ 21,997.25	-₹ 3,02,073.44
DII	₹ 72,673.91	₹ 1,68,544.70	₹ 6,48,026.82

Source: Moneycontrol.com

Global Market (Jun`2025)

GLOBAL INDICES

YOY %	OPENING	CLOSING	1M % CHG	1Y % CHG
Nasdaq 100	21,340.99	22,679.01	6.27%	15.22%
Dow Jones	42,270.07	44,094.77	4.32%	12.72%
Hang Seng	23,289.77	24,072.28	3.36%	35.86%
Nikkei 225	37,965.10	40,487.39	6.64%	2.28%
Source: Investing.com				

ECONOMIC INDICATORS

YOY %	CURRENT	QUARTER AGO	YEAR AGO
Consumer Price Index	2.82% (May - 25)	3.61% (Feb - 25)	4.75% (May - 24)
India Industrial Production	1.2% (May - 25)	2.9% (Feb - 24)	5.9% (May - 24)
GDP	7.4% (Jan - Mar,2025)	6.2% (Oct - Dec,2024)	7.8% (Jan - Mar, 2024)
Wholesale Price Index	0.39% (May - 25)	2.38% (Feb - 25)	2.61% (May - 24)
✦ Source: Ministry of Statistics and Programme Implementation, Office of the Economic Advisor			

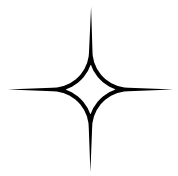
Currency &
Commodity

PRICE MOVEMENT

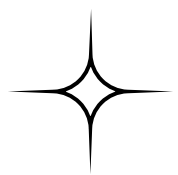
Currency And Commodity	30 Jun	1M Ago	3M Ago	1Y Ago
USD	85.7	85.52	85.46	83.35
NYMEX Crude oil(\$/bbl)	65.11	60.79	71.48	81.54
Gold (Rs / gm)#	96,075	95,875	91,948	75,973

✦ Source - ibja- rates spot prices, investing.com, tradingview, gold price india

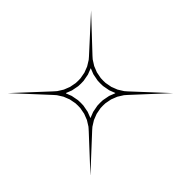
BHARAT BULLETIN



The RBI lowered its key repo rate by 50 bps to 5.5%, while shifting its policy stance from accommodative to neutral. It also slashed the CRR by 100 bps to 3%. It maintained its GDP growth forecast for FY2025/26 at 6.5%. Inflation projections were revised down to 3.7% from 4%.

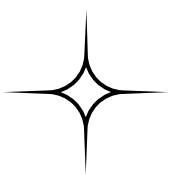


India's retail inflation dropped to 2.82% in May, down from 3.16% in April, mainly due to a slower increase in food prices.

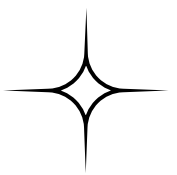


India's GDP growth touched a four-quarter high of 7.4% in the last and final quarter of FY25, with full-year growth ending at 6.5%. The recovery pointed to traction in Indian economic growth after a period of softening, as lower food and energy prices improved households' purchasing power.

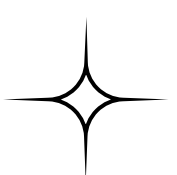
INTERNATIONAL UPDATES



Eurozone CPI eased to 1.9% YoY in May 2025, down from 2.2% in April. This marks the first time inflation has fallen below ECB's 2.0% target since Sept-24. A key driver of the deceleration was a sharp slowdown in services inflation and lower energy prices.



Germany's trade surplus dropped sharply to EUR 14.6 bn in April 2025, as exports declined and imports increased. Exports fell by 1.7% MoM to EUR 131.1 bn due to lower sales to the US, China, and the UK. Imports rose by 3.9% to EUR 116.5 bn.



China's trade surplus widened sharply to USD 103.22 bn in May 2025, up from USD 81.74 bn in the same period a year earlier, as exports rose 4.8% YoY, while imports dropped more than anticipated by 3.4%

RISK FACTOR AND DISCLAIMER

Equities as an asset class carry a higher risk in comparison to debt. While risk cannot be totally eliminated, it can be mitigated through a well-designed investment strategy. However, this objective may not be fully achieved due to various reasons such as unfavourable market movements, misjudgement by portfolio manager, adverse political or economic developments etc.

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Custodian/DP – Orbis Financial Corporation Ltd

Banker- State Bank of India