

Weekly Market Update

Date – (11th Aug 2025 to 15th Aug 2025)

Market Overview

Indian equity markets saw volatile movements over the week, driven by geopolitical developments, trade tensions, inflation data, and interest rate expectations.

The week began with sharp declines after the U.S. President unexpectedly doubled tariffs on Indian exports, raising concerns about India's manufacturing outlook and economic growth. Escalating trade tensions and fears of increased foreign institutional investor outflows further dampened sentiment.

Midweek, markets recovered slightly as attention shifted towards the upcoming meeting between the U.S. and Russian Presidents aimed at negotiating an end to the war in Ukraine. Hopes of easing geopolitical tensions, along with dovish remarks from the U.S. Federal Reserve's Vice Chair for Supervision indicating the possibility of three rate cuts this year, supported investor confidence.

However, sentiment weakened again amid persistent trade concerns and renewed foreign fund outflows. Optimism over a potential removal of Russian oil sanctions added a mixed tone to market moves, with investors awaiting domestic and U.S. inflation data for further policy cues.

Towards the end of the week, markets rebounded strongly after official data showed a sharper-than-expected easing in India's July consumer price inflation the lowest in over eight years and below the RBI's tolerance band. This bolstered expectations of an additional RBI rate cut. Positive global cues, a weaker U.S. dollar, and U.S. inflation data in line with forecasts also reinforced the likelihood of a Federal Reserve rate cut in September, further boosting sentiment.

As a result, the BSE Sensex fell by 1.01%, closing at 79,857, while the Nifty 50 up by 0.47%, settling at 24,363

Market Summary > NIFTY 50

24,631.30

+116.35 (0.47%) ↑ past 5 days

14 Aug, 3:30 pm IST • Disclaimer

+ Follow



80,597.66

+360.24 (0.45%) ↑ past 5 days

14 Aug, 3:30 pm IST • Disclaimer

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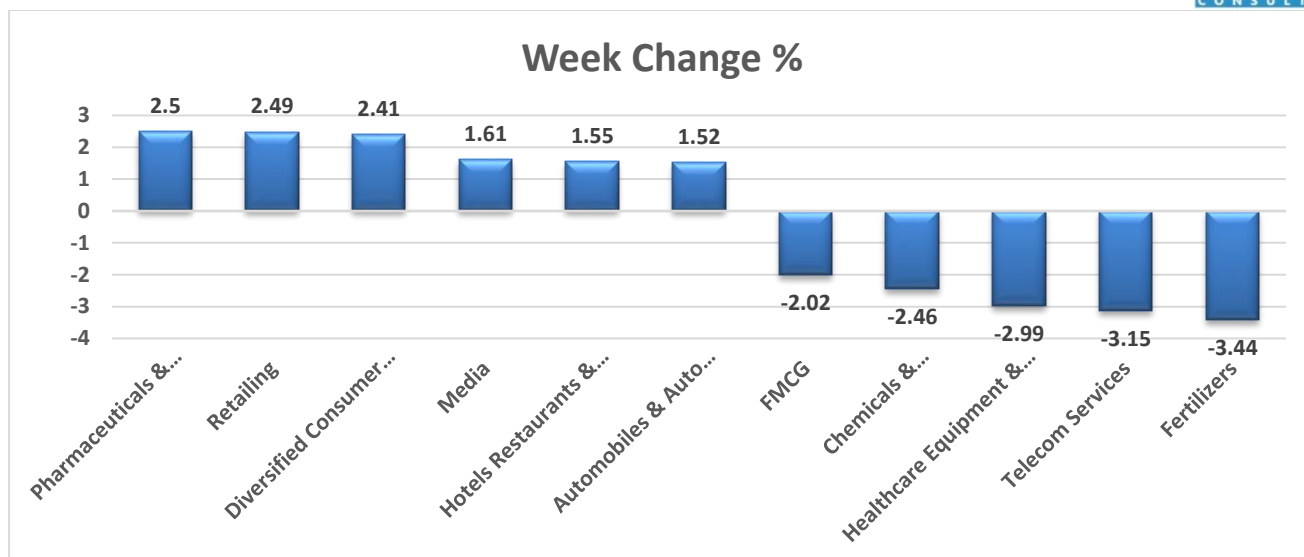
INSTITUTIONAL INVESTMENT TRENDS

Indian equities witnessed contrasting investor flows between 11 and 14 August 2025. Foreign Institutional Investors (FIIs) remained consistent net sellers, with their largest outflow of ₹3,644.43 crore recorded on 13 August. In sharp contrast, Domestic Institutional Investors (DIIs) were strong buyers throughout the period, making their biggest purchase of ₹5,972.36 crore on 11 August. Their sustained buying including ₹5,623.79 crore on 13 August effectively absorbed FII selling pressure, providing crucial support to the market and preventing steeper declines despite persistent global headwinds.



SECTORAL HIGHLIGHTS

Pharmaceuticals (+2.5%), Retailing (+2.49%), and Diversified Consumer Services (+2.41%) led the gains, supported by resilient demand and defensive positioning. Media, Hotels & Restaurants, and Automobiles also posted moderate gains, with returns between 1.5–1.6%. Conversely, Fertilizers (-3.44%) and Telecom Services (-3.15%) were the biggest laggards, while Healthcare Equipment, Chemicals, and FMCG sectors also saw notable declines, each losing over 2%. This contrasting sectoral movement highlights investors' preference for defensives amid broader market volatility.

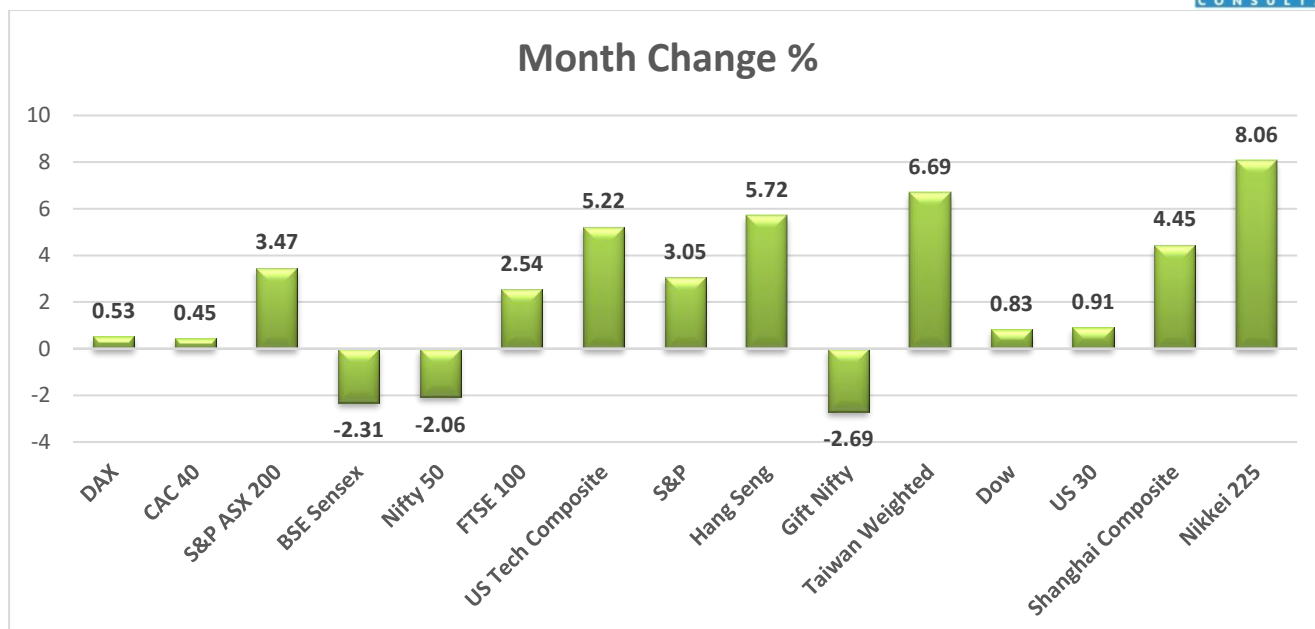


KEY MACRO ECONOMIC DATA (INDIA)

Indicator	Frequency	Latest Period	Value
INFLATION RATE	Monthly	Jul-25	1.55
INTEREST RATE	Daily	06-Aug	5.5
UNEMPLOYMENT RATE	Monthly	Jun-25	5.6
GDP	Yearly	2024	3,913
GDP ANNUAL GROWTH RATE	Quarterly	Mar-25	7.4
GDP GROWTH RATE	Quarterly	Mar-25	2
GDP PER CAPITA	Yearly	2024	2,397
GOVERNMENT DEBT TO GDP	Yearly	2023	81.59
GOVERNMENT SPENDING	Quarterly	Mar-25	5,084
FISCAL EXPENDITURE	Monthly	Jun-25	12,22,127
CURRENT ACCOUNT	Quarterly	Mar-25	13,500
CURRENT ACCOUNT TO GDP	Yearly	2024	-0.6
CREDIT RATING	Monthly	Aug-25	56
CONSUMER PRICE INDEX (CPI)	Monthly	Jul-25	196

GLOBAL EQUITY MARKET OVERVIEW (14 July 2025 – 14 Aug2025)

Global equity markets posted mixed returns over the past month, with several Asian indices leading the gains. Japan's Nikkei 225 climbed the highest, delivering an impressive 8.06% gain, followed by Taiwan Weighted (+6.69%), Hang Seng (+5.72%), and US Tech Composite (+5.22%), reflecting strong sentiment in technology and select Asian markets. The Shanghai Composite (+4.45%), S&P ASX 200 (+3.47%), FTSE 100 (+2.54%), and S&P 500 (+3.05%) also recorded healthy advances. In contrast, Indian benchmarks like the BSE Sensex (-2.31%), Nifty 50 (-2.06%), and GIFT Nifty (-2.69%) faced declines, weighed down by global headwinds and domestic factors. European indices such as DAX (+0.53%) and CAC 40 (+0.45%) saw modest gains, while the Dow (+0.83%) and US 30 (+0.91%) ended slightly higher. This month's divergence highlights the strength in Asia and technology-focused markets, with India and a few sectors underperforming.

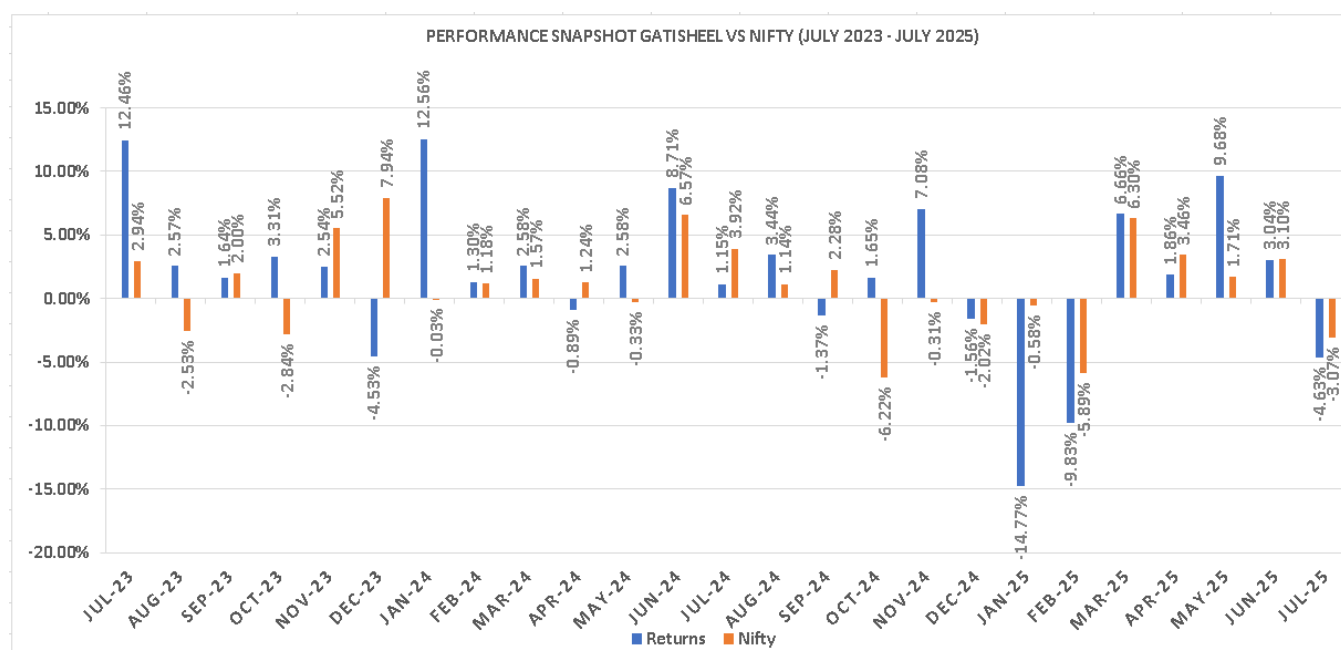


PORTFOLIO PERFORMANCE UPDATE

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.

Portfolio Overview: Outperformance Potential with Balanced Risk-Reward

The portfolio has shown the ability to outperform the Nifty in key months through strong stock selection and active management, capturing sharp gains in favorable markets while limiting losses in volatile periods. Its diversified, growth-oriented approach balances risk and reward, appealing to investors seeking higher returns and alpha beyond passive index gains. The active management approach underlying this basket allows for nimble responses to market changes, enhancing the chance to capitalize on emerging trends.



Note – The month-on-month % changes exclude dividends. A 3.39% dividend yield is not included, so total investor returns would be higher than the price changes shown.

Mutual Fund Model Portfolio: July Update

MODEL PORTFOLIO SUMMARY					
As of 31-Jul-2025					
Performance Overview					
Portfolio	Objective	Asset Allocation	Portfolio Age	XIRR (Jun-25)	XIRR (Jul-25)
Portfolio-1	Wealth Creation	94% Equity/ 6% Debt	9 Years 10 Months	23.56%	22.38%
Portfolio-2	Wealth Creation	90% Equity/ 10% Debt	8 Years 2 Months	24.27%	22.19%
Portfolio-3	Education	80% Equity/ 20% Hybrid	8 Years 4 Months	25.15%	23.94%
Portfolio-4	Retirement	70% Equity/ 30% Debt	7 Years	19.31%	17.00%
Portfolio-5	Wealth Creation	93% Equity/ 7% Debt	9 Years 10 Months	18.80%	17.23%

Key Insights

- All portfolios witnessed negative growth in July 2025 compared to June, likely due to market corrections.
- Portfolio-3 (Education) remained the top performer with a robust return of 23.94% supported by a balanced equity- hybrid strategy.
- Wealth Creation portfolios (1, 2, 5) with high equity allocations continued to deliver strong long-term returns, despite a short-term dip.
- Portfolio-4 (Retirement), with the most conservative asset mix, provided stable but lower returns, consistent with its risk profile.

Takeaways for Investors

- High Equity Exposure has consistently delivered superior long- term performance across portfolios.
- Regular monitoring and strategic rebalancing help protect gains and manage volatility.
- Diversification (e.g., hybrid components in Education and Retirement portfolios) supports better risk adjusted returns.
- Stay invested with a long-term view, and avoid reacting to short term market fluctuations.

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