



ClickToInvest Monthly Market Insights

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June 2025



International Economy

International Economy – June 2025

Global markets in June remained cautious amid continuing trade tensions on the back of tariff shocks perpetuated by the US government and mixed economic indicators. The U.S. maintained its hawkish tone as inflation showed signs of persistence, despite weakening consumer sentiment. The Fed signaled no rate cuts until Q4, keeping investors on edge.

In Europe, ECB paused its easing cycle as inflation in the Eurozone edged higher unexpectedly. The ECB is expected to cut policy rates by 25 basis points in September, until the deposit rate reaches 1.75% in July 2025. The UK economy continued to contract with manufacturing PMI at multi-month lows. Meanwhile, China's efforts to stimulate domestic demand via infrastructure investments are ongoing but show limited impact so far. Deflationary pressures are currently persisting.

India continues to shine as a relatively stable macroeconomic environment, supported by steady GDP growth and moderating inflation, and a stable currency despite global uncertainty.

GDP Growth and Inflation GDP Growth									
%		GDP Growth				Inflation Growth			
		2023	2024	2025e	2026e	2023	2024	2025e	2026e
United States		2.9	2.8	1.7	1.6	4.1	2.9	2.9	3.2
Japan		1.5	0.1	0.7	0.4	3.3	2.7	3.3	2.2
United Kingdom		0.4	1.1	1.2	1	7.3	2.5	3.2	2.5
Euro Area		0.5	0.8	1.2	1.3	5.4	2.4	2.1	1.9
Germany		-0.1	-0.2	0.5	1	6	2.5	2.3	2
France		1.1	1.1	0.6	1.1	5.7	2.3	0.9	1.2
Italy		0.8	0.5	0.8	1.3	5.9	1.1	1.7	1.7
Spain		2.7	3.2	2.5	2.2	3.4	2.9	2.2	2
China		5.2	5	4.8	4.5	0.2	0.2	0	1
India*		7	8.2	6.5	6.3	6.7	5.4	4.6	4.1
Brazil		2.9	3.4	2.4	1.3	46	44	5.2	48
Source	BNP Paribas (e: Estimates & forecasts)								

Domestic Economy

India's macro indicators for June remain encouraging with Index of Industrial Production **IIP** improving to **3.4% YoY** in May (from 2.7% in April), indicating a rebound in industrial activity. **CPI inflation** remained low at **2.82%**, still under the RBI's 4% comfort zone, mainly aided by cooling food and fuel prices.

The repo rate remains at **5.50%** post the 50 bps cut in May. Analysts expect a prolonged pause now as the central bank waits to assess the inflation trajectory. **GST collections** in June were at **₹1.68 lakh crore**, a slight dip from the record April-May levels but still above trend, reflecting stable consumption patterns.

India's total exports touched a new high of **USD 824.9 billion in 2024–25**, growing by **6.01 per cent** from **USD 778.1 billion in 2023–24**. This marks a sharp rise from **USD 466.22 billion in 2013–14**, underlining a decade of sustained export momentum.

Future Market Outlook

The outlook for Q3 FY26 remains constructive for India on the back of lower interest rates and

improved liquidity that are likely to support **credit growth and consumption**. Corporate earnings for Q1 FY26 are expected to remain strong, especially in domestic sectors like auto, infra, and banking. However, global risks like higher U.S. interest rates, Middle East tensions, and a strong dollar—may keep FPI flows volatile.

Stock Market Update

As of June 30, 2025, the Indian stock markets concluded the month marginally high:

o BSE Sensex closed June around **83,606.46** gaining **+2.67%** for the month.

o NSE Nifty 50 finished the month near **25,517.05** marking a gain of **+3.14%** in June .

Foreign Portfolio Investors (FPIs) infused approximately \$ 1.42 billion, down from May's \$ 2.34 billion amid global risk-off sentiment.

Domestic mutual fund inflows saw an inflow of ₹3.55 Trillion (~\$42.6 billion) in June quarter. The inflows were primarily driven by debt funds. Midcaps gained **+5.1%**, while small caps were up **+4.6%**, driven by domestic investor confidence and rotational buying.

Mutual Fund Portfolio Mix – Top Performers (June 2025)

Positive macroeconomic conditions and steady corporate earnings have contributed to the positive performance of mid-small segment.

Category	Scheme Name	1 Month Return	AUM (₹ Cr)
Thematic	TATA Resources & Energy Fund	4.70%	1,172
International	ICICI Prudential US Bluechip Equity Fund	4.60%	3,113
International	DSP US Flexible Equity FOF	4.40%	935
Dynamic Asset Allocation	Motilal Oswal Balanced Advantage Fund	4.40%	913
Large and Mid Cap	HDFC Large and Mid Cap Fund	4.40%	26,849
Multi Cap	LIC MF Multi Cap Fund	4.30%	1,644
Multi Cap	Motilal Oswal Multicap Fund	4.00%	3,991
Sectoral- Infrastructure	BOI Manufacturing & Infrastructure Fund	3.80%	607
Sectoral- Technology	ICICI Prudential Technology Fund	3.80%	14,590
International	PGIM India Emerging Markets Equity FOF	3.70%	257

Precious Metals Update (as of June, 2025)

Gold and silver prices have seen fluctuations due to global economic uncertainties:

Metal	Price (₹) per 10g	1M Change
Gold 24K	99,870	2.56%
Silver	1,00,125	2.90%

Top 5 PMS Picks (June 2025)

Based on recent performance and strategic focus, here are the top Portfolio Management Services (PMS) from our empanelled list based on 1 month returns:

PORTFOLIO	CATEGORY	1 Month
UNIFI CAPITAL - Blended Rangoli	Flexi Cap	6.67%
CARNELIAN ASSET MANAGEMENT - Shift Strategy	Multi Cap	4.90%
ABAKKUS ASSET MANAGERS - All Cap Approach	Multi Cap	4.80%
ABAKKUS ASSET MANAGERS - Emerging Opportunities	Small & Mid Cap	3.95%
VALUEQUEST INVESTMENT ADVISORS - Growth	Multi Cap	3.54%

**Source: PMS BAZAAR*

Spotlight

Edelweiss Launches Altiva SIF Platform

Edelweiss Asset Management has launched Altiva SIF, a pioneering platform for Specialized Investment Funds (SIFs). This marks Edelweiss as one of the first AMCs in India to formally enter this emerging category, aiming to offer the flexibility of PMS with the regulatory structure of mutual funds.

Key Highlights:

Target Audience: Designed for HNIs and sophisticated investors seeking tailored and thematic strategies.

Investment Strategies: Includes sector-focused approaches, hybrid models, and even derivative-based strategies.

Minimum Investment: ₹10 lakh, in line with SEBI's eligibility criteria for SIFs.

Hybrid Positioning: Altiva bridges the gap between MFs and PMS/AIFs, offering both customization and compliance.

SEBI Approval: Edelweiss has received regulatory approval to launch and manage SIFs under this platform.

First Launch Focus: Initial products are expected to be in the hybrid strategy category, aligning risk-managed exposure with tactical allocation.

Brand Identity: “Altiva,” inspired by the word “altitude,” reflects a vision of disciplined, elevated investing.



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