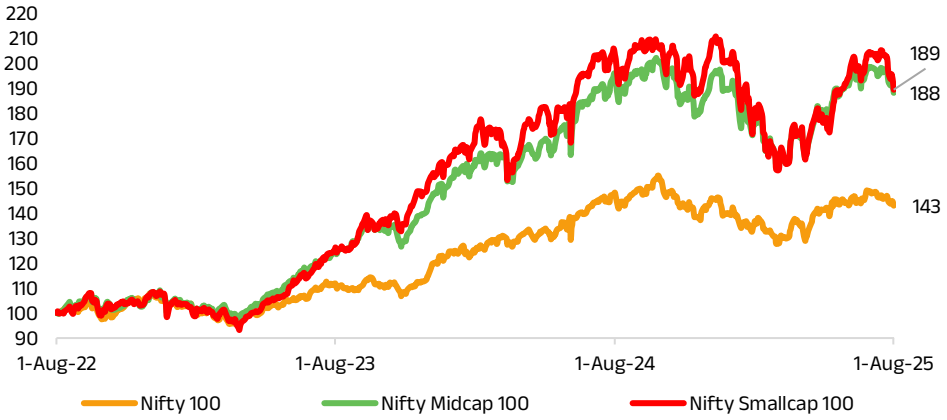


Broad Indices Historical Movement



Source: NSE

Broad Indices

	1-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,565.35	-0.82%	-1.09%	-3.82%
Nifty 100	25,149.60	-0.91%	-1.15%	-3.85%
Nifty 200	13,678.50	-0.98%	-1.36%	-4.08%
Nifty 500	22,673.65	-1.05%	-1.48%	-3.99%
Nifty Large Midcap 250	15,919.25	-1.09%	-1.54%	-3.89%
Nifty Midcap 150	21,088.65	-1.28%	-1.92%	-3.93%
Nifty Next 50	66,192.80	-1.35%	-1.42%	-3.97%
Nifty Smallcap 250	16,863.25	-1.64%	-2.97%	-5.06%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	1-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,863.45	-1.20%	-2.40%	-6.42%
NIFTY 500 Value 50	13,626.95	-1.69%	-3.33%	-5.24%
Nifty 200 Quality 30	20,081.25	-0.61%	-0.45%	-4.20%
Nifty 50 Equal Weight	30,660.35	-1.08%	-1.50%	-4.37%
NIFTY Alpha Low Volatility 30	26,055.20	-1.39%	-1.55%	-4.11%
Nifty High Beta 50	3,590.10	-1.64%	-3.47%	-7.29%
Nifty Low Volatility 50	24,541.15	-1.03%	-0.62%	-3.24%
Nifty Midcap150 Momentum 50	60,474.45	-1.24%	-1.58%	-5.03%
Nifty PSE	9,537.75	-1.50%	-2.57%	-5.44%
Nifty SME Emerge	15,060.83	-0.71%	0.11%	1.67%
Nifty 100 ESG	4,829.35	-1.14%	-1.44%	-3.49%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	1-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	23,410.95	-1.04%	-1.56%	-1.73%
Nifty Bank	55,617.60	-0.62%	-1.61%	-3.21%
Nifty Consumption	11,697.15	-0.36%	0.08%	-1.13%
Nifty Financial	26,492.50	-0.59%	-1.18%	-2.33%
Nifty FMCG	56,197.05	0.69%	2.96%	3.11%
Nifty Healthcare	14,468.70	-2.77%	-2.54%	-0.18%
Nifty IT	34,649.60	-1.85%	-2.73%	-10.77%
Nifty Media	1,616.80	-0.59%	-3.16%	-6.62%
Nifty Metal	9,102.35	-1.97%	-3.42%	-4.83%
Nifty MNC	28,684.25	-0.22%	0.43%	-0.32%
Nifty Pharma	22,011.70	-3.33%	-2.87%	-0.13%
Nifty Realty	896.15	-1.78%	-5.73%	-8.95%
Nifty Energy	34,889.00	-0.65%	-1.03%	-4.36%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	1-Aug-25	Prev_Day	% Change	1 Week
Asian Paints	2,431.00	2,396.10	1.46	4.06
HUL	2,553.70	2,521.20	1.29	5.73
Hero Moto	4,311.60	4,260.70	1.19	1.91
ITC	416.45	411.95	1.09	1.72
Eicher Motors Limited	5,528.00	5,468.50	1.09	1.75

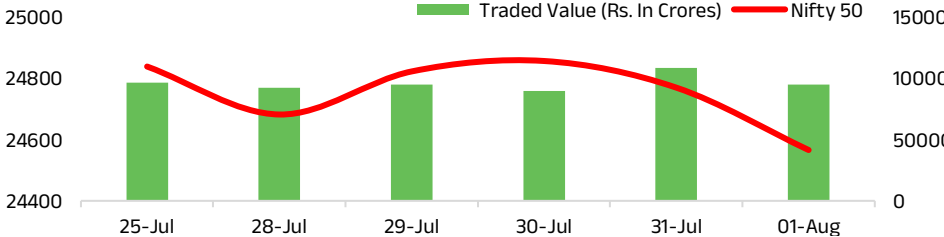
Source: NSE

Nifty 50 Top 5 Losers

Company	1-Aug-25	Prev_Day	% Change	1 Week
United Phos	665.15	704	-5.49	-7.90
Sun Pharma	1,629.70	1707	-4.51	-4.08
Divi's Lab	6,361.50	6596	-3.55	-3.85
BPCL	317.85	329	-3.48	-4.52
Cipla	1,502.80	1555	-3.33	-1.94

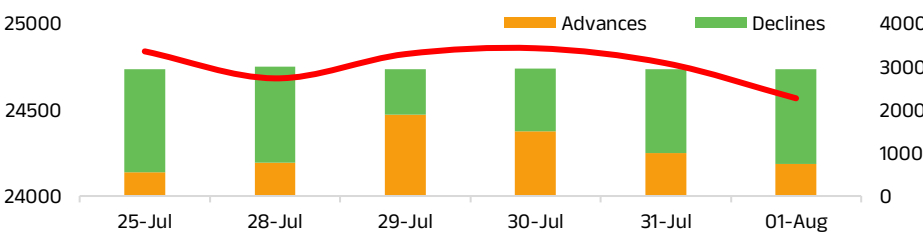
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

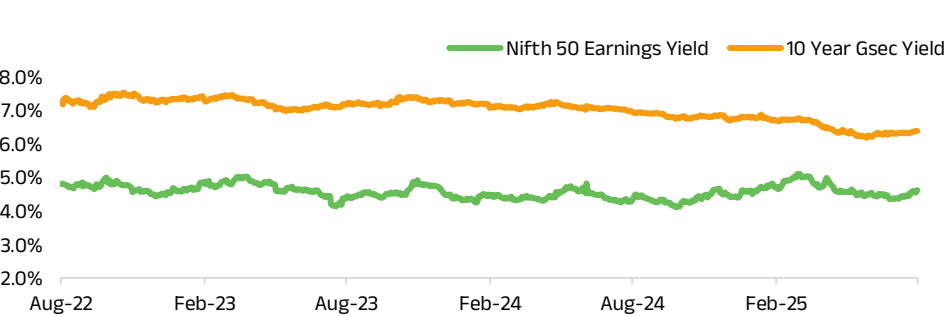
Indian equity markets fell sharply, extending losses from the previous session amid weak global cues, with tariff concerns, and continued foreign portfolio outflows kept investors cautious. Sentiment weakened after the U.S. President signed an executive order imposing a steeper-than-expected 25% tariff on Indian goods. While India was spared from further penalties over its Russian defence and energy deals, the protectionist move has clouded prospects for a potential U.S.-India trade deal.

Adani Power reported its results for the quarter ended Jun 2025, posting a 15.5% YoY decline in consolidated net profit to Rs. 3,305 crore, compared to Rs. 3,913 crore in the same period last year. Meanwhile, the company's revenue also declined by 5.9% YoY.

Tata Power reported a 9% increase in its Q1FY26 consolidated net profit to Rs.1,060 crore, compared to Rs. 970 crore in the same period last year. The profit after tax (PAT) is attributable to the equity holders of the company.

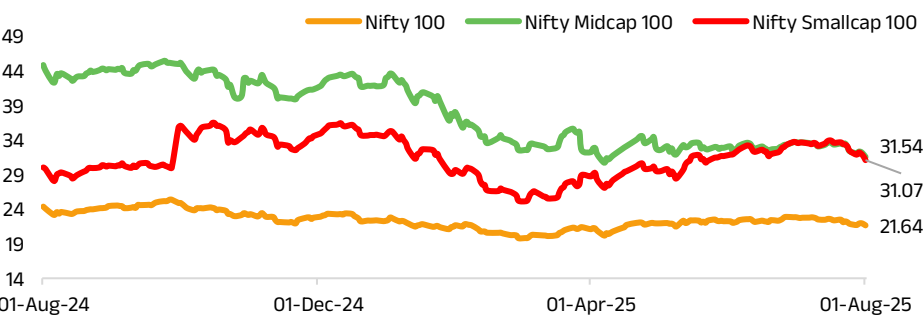
Adani Group-owned Ambuja Cements reported a 24% YoY increase in consolidated net profit to Rs. 970 crore in Q1FY26, driven by its highest-ever quarterly sales volume and revenue. However, the bottom line came in below market expectations.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



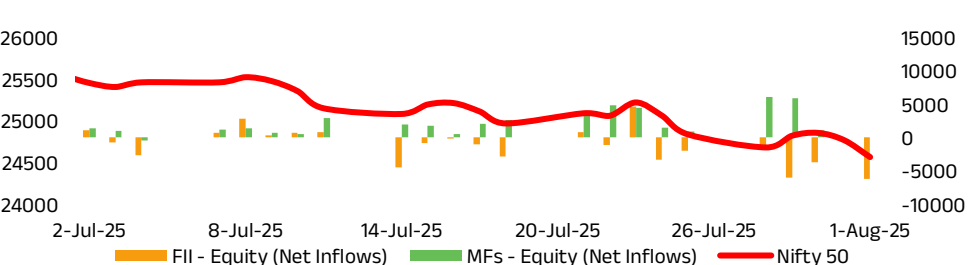
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII	-6153.28	-6,153	-23,894	-101,794
MF**	1071.34	45,400	45,400	278,451
DII	3186.86	3,187	64,126	412,601

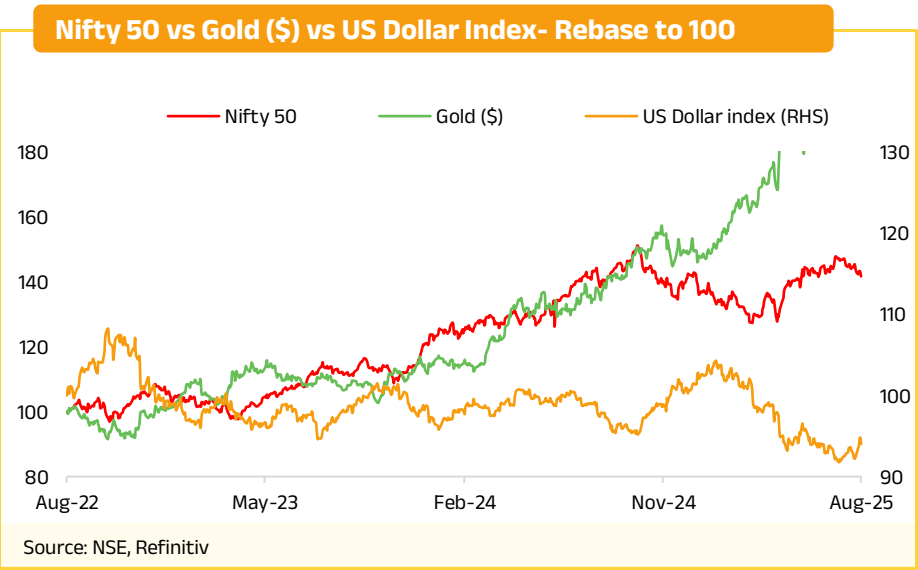
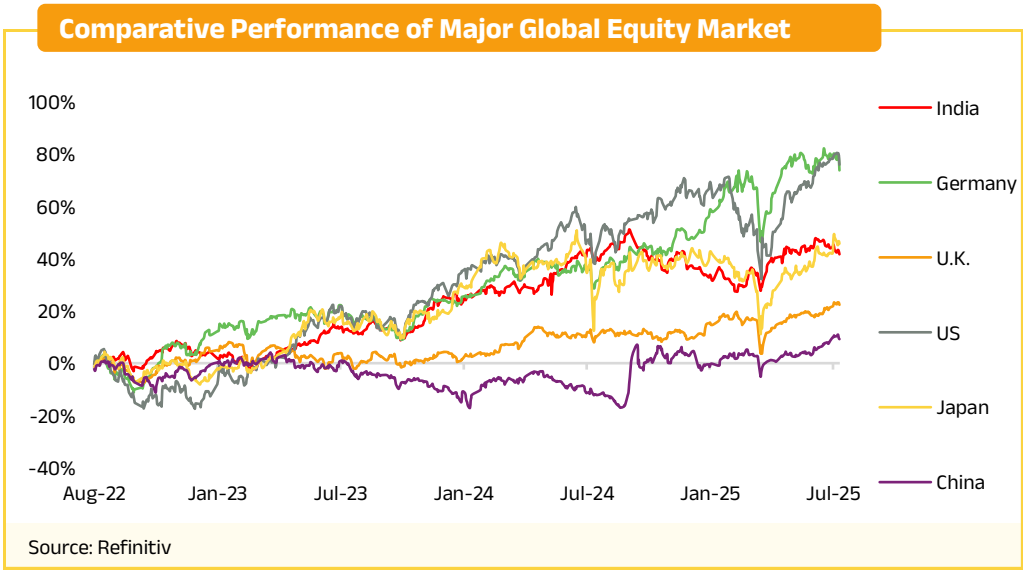
Source: SEBI, NSDL;**As on 30th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24627.20	24771.90	-0.58%
Near Basis	61.85	3.55	1642.25%
Mid Futures	24774.60	24871.60	-0.39%
Mid Basis	209.25	103.25	102.66%
Near Open Interest (Cr.)	1.69	0.53	219.96%
Mid Open Interest (Cr.)	0.09	1.56	-94.14%
Rollover (%)	5.46	75.71	-92.79%
Put Call Ratio (OI)	0.75	1.01	-26.18%
Put Call Ratio(Vol)	0.97	0.93	4.83%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	11498	12735	31938
Index Options	4718863	4710767	176129
Stock Futures	39446	40976	367430
Stock Options	14818	15591	6008
Total	4784625	4780069	581505
Source: NSE			

Global Equity Market				
Global Indices	1-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3411.98	-1.63%	-2.42%	0.59%
Nasdaq 100 (U.S.)	22763.31	-1.96%	-2.19%	1.27%
FTSE (U.K.)	9068.58	-0.70%	-0.57%	3.22%
DAX Index (Germany)	23425.97	-2.66%	-3.27%	-1.04%
CAC 40 Index (France)	7546.16	-2.91%	-3.68%	-1.52%
SSE Composite (China)	3559.95	-0.37%	-0.94%	2.96%
Nikkei (Japan)	40799.60	-0.66%	-1.58%	2.03%
Kospi (South Korea)	3119.41	-3.88%	-2.40%	0.96%
HangSeng (Hong Kong)	24507.81	-1.07%	-3.47%	1.81%
Strait Times (Singapore)	4153.83	-0.48%	-2.52%	4.11%
Ibovespa Sao Paulo (Brazil)	132437.39	-0.48%	-0.81%	-5.10%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8662.00	-0.92%	-0.06%	1.42%
Jakarta Composite (Indonesia)	7537.77	0.71%	-0.08%	9.00%
KLSE (Malaysia)	1533.35	1.33%	-0.03%	-0.53%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	1-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,770	-0.30%	-0.28%	0.90%
Gold (\$/oz)	3,362.51	2.20%	0.80%	0.71%
Silver (INR/1 kg)	109,416	-0.54%	-4.30%	2.62%
Silver (\$/oz)	37.02	0.76%	-2.94%	2.66%
Brent Crude(\$/bbl)	71.83	-4.26%	0.91%	3.73%
Crude Oil (INR/1 bbl)	6,064.00	-0.74%	6.39%	8.95%
NYMEX Crude(\$/bbl)	68.29	-2.80%	3.03%	2.63%
Natural Gas (INR/1 mmbtu)	271.90	2.33%	1.80%	-15.16%
Aluminium (INR/1 kg)	250.65	-1.09%	-1.96%	0.76%
Copper (INR/1 kg)	883.65	0.06%	-1.60%	-1.82%
Nickel (INR/1 kg)	1,330.00	0.18%	-1.59%	0.51%
Lead (INR/1 kg)	184.50	1.10%	-1.36%	1.10%
Zinc (INR/1 kg)	264.75	-1.58%	-3.29%	1.81%
Mentha Oil (INR/1 kg)	964.30	-0.78%	2.50%	2.43%
Baltic Dry Index	2,018	0.75%	-10.59%	38.41%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Stock Split

Definition: A stock split is a corporate action where a company divides its existing shares into multiple new shares to boost liquidity and make shares more affordable.



Explanation

Though the number of shares increases, the total value of holdings remains unchanged. For example, in a 2-for-1 split, each shareholder receives two shares for every one held, and the share price is halved. Stock splits are often seen as a signal of confidence from management and can attract more retail investors. They do not affect the company's fundamentals but may influence market perception and trading volume positively over time.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-3.31	4.92	-2.19	14.61
Mid Cap Fund	-3.14	6.79	-1.89	21.24
Large & Mid Cap Fund	-3.36	6.13	-1.27	18.44
Small Cap Fund	-2.56	5.86	-2.54	21.60
Multi Cap Fund	-2.93	5.95	-1.31	19.50
Focused Fund	-3.01	5.38	-1.52	16.07
Value Fund	-3.38	4.28	-4.53	19.85
Contra Fund	-2.41	5.79	-2.20	21.08
ELSS	-3.14	5.65	-2.12	17.40
Equity Savings	-0.49	4.06	4.64	9.87
Arbitrage Fund	0.56	3.25	6.70	6.81
Dividend Yield Fund	-3.23	3.12	-6.28	19.17
Aggressive Hybrid Fund	-2.14	5.55	0.78	14.73
Balanced Advantage	-1.72	4.34	1.08	11.76
Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.				