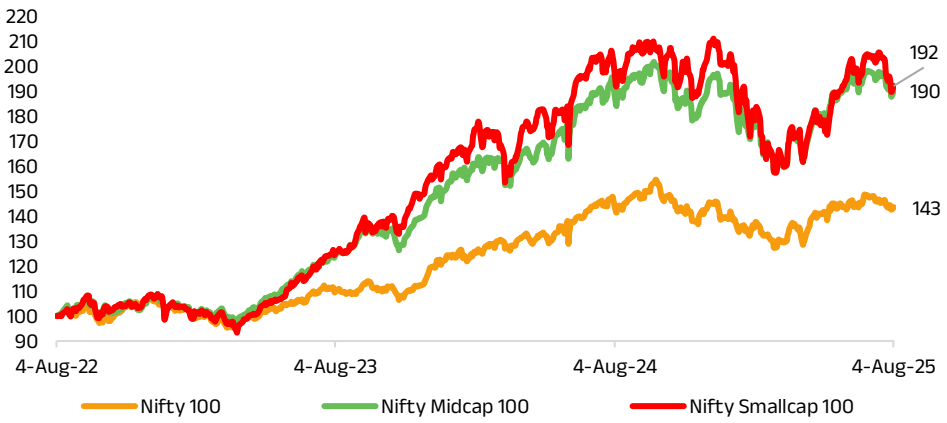


Broad Indices Historical Movement



Source: NSE

Broad Indices

	4-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,722.75	0.64%	0.17%	-2.90%
Nifty 100	25,330.20	0.72%	0.18%	-2.83%
Nifty 200	13,792.60	0.83%	0.12%	-2.99%
Nifty 500	22,860.40	0.82%	0.06%	-2.98%
Nifty Large Midcap 250	16,067.30	0.93%	0.12%	-2.88%
Nifty Midcap 150	21,329.40	1.14%	0.07%	-2.93%
Nifty Next 50	66,917.50	1.09%	0.22%	-2.46%
Nifty Smallcap 250	17,028.65	0.98%	-0.78%	-4.13%

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

Smart Beta Index

Index	4-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,233.20	1.24%	-0.28%	-3.85%
NIFTY 500 Value 50	13,807.50	1.32%	-1.17%	-3.74%
Nifty 200 Quality 30	20,318.40	1.18%	1.05%	-3.69%
Nifty 50 Equal Weight	30,998.80	1.10%	0.23%	-2.94%
NIFTY Alpha Low Volatility 30	26,261.85	0.79%	-0.14%	-3.28%
Nifty High Beta 50	3,663.80	2.05%	-0.01%	-4.85%
Nifty Low Volatility 50	24,694.35	0.62%	0.38%	-2.80%
Nifty Midcap150 Momentum 50	61,124.15	1.07%	0.32%	-3.53%
Nifty PSE	9,628.25	0.95%	-0.88%	-4.76%
Nifty SME Emerge	15,080.14	0.13%	0.26%	1.27%
Nifty 100 ESG	4,870.45	0.85%	-0.09%	-2.65%

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

Sector Indices

Index	4-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	23,787.50	1.61%	0.40%	-0.80%
Nifty Bank	55,619.35	0.00%	-0.83%	-2.48%
Nifty Consumption	11,782.35	0.73%	1.47%	0.05%
Nifty Financial	26,476.60	-0.06%	-0.52%	-1.45%
Nifty FMCG	56,139.65	-0.10%	2.57%	2.57%
Nifty Healthcare	14,551.75	0.57%	-2.08%	-1.12%
Nifty IT	35,203.35	1.60%	-0.47%	-10.12%
Nifty Media	1,641.15	1.51%	1.02%	-6.85%
Nifty Metal	9,327.85	2.48%	0.12%	-2.64%
Nifty MNC	28,744.95	0.21%	1.08%	-0.55%
Nifty Pharma	22,153.80	0.65%	-2.67%	-1.03%
Nifty Realty	912.05	1.77%	0.02%	-6.16%
Nifty Energy	34,923.45	0.10%	-0.28%	-4.34%

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

Nifty 50 Top 5 Gainers

Company	4-Aug-25	Prev_Day	% Change	1 Week
United Phos	711.70	665.15	7.00	-2.49
Hero Moto	4,535.90	4,311.60	5.20	5.70
Adani Ports & SEZ	1,388.90	1,347.10	3.10	0.94
JSW Steel	1,055.90	1,027.80	2.73	2.63
IndusInd Bank	804.05	783.70	2.60	0.25

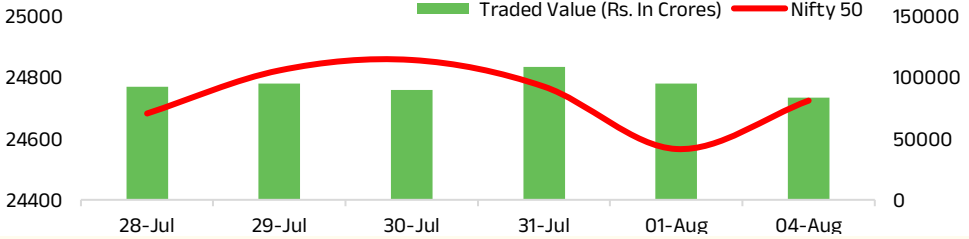
Source: NSE

Nifty 50 Top 5 Losers

Company	4-Aug-25	Prev_Day	% Change	1 Week
Power Grid	287.95	291	-1.13	-1.35
HDFC Bank	1,992.00	2012	-1.00	-0.82
ONGC	234.83	237	-0.83	-2.16
ICICI Bank	1,463.20	1472	-0.57	-1.69
HUL	2,543.70	2554	-0.39	4.18

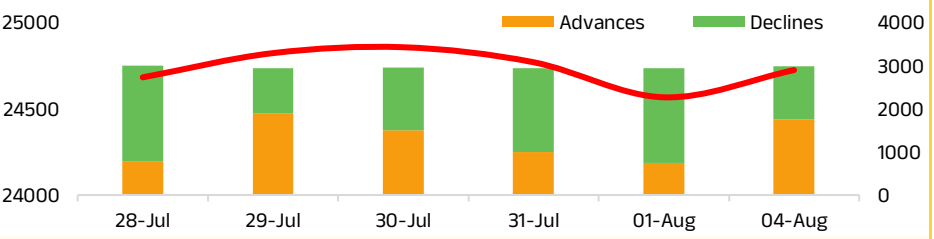
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE




Indian equity markets rose as soft U.S. jobs data from Jul 2025 signaled a sharp deterioration in labor market conditions, fueling expectations of imminent rate cuts by the U.S. Federal Reserve. Sentiment was further supported by falling oil prices, driven by supply glut concerns, and a weaker dollar due to tariff-related worries and growing fears of political influence on key institutions in the U.S.



JSW Steel and Japan's JFE Steel plan to invest Rs. 5,845 crore (approximately \$669 million) to expand the production of cold rolled grain-oriented (CRGO) electrical steel at two of their plants in India, according to a report by news agency Reuters. The investment aims to meet growing domestic demand for energy-efficient steel, primarily used in transformers and other power-related applications.

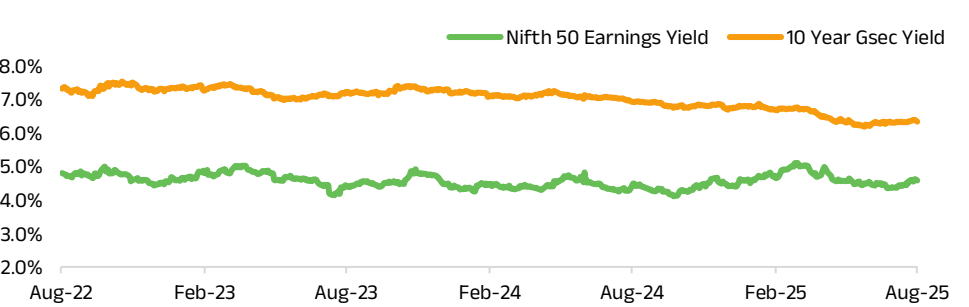


Marico reported its Q1FY26 profit, driven by steady demand for its cooking and hair oils. The company's consolidated net profit rose nearly 9% to Rs. 504 crore (\$57.51 million) in the Apr-Jun quarter, surpassing analysts' estimates of Rs. 486 crore.



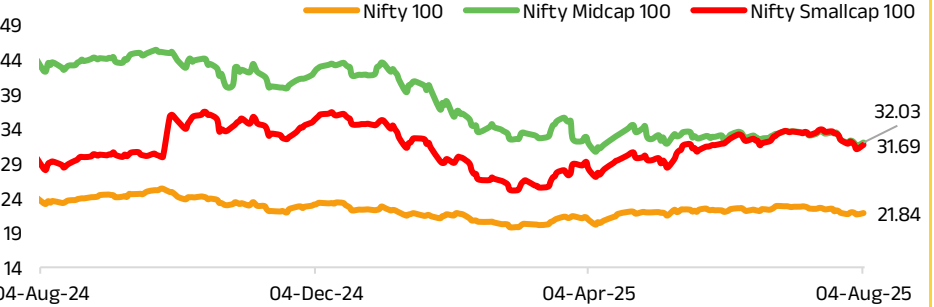
Federal Bank reported a standalone net profit of Rs. 861.75 crore, down 14.6% YoY compared to a profit of Rs. 1,009.53 crore in the corresponding quarter of last year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



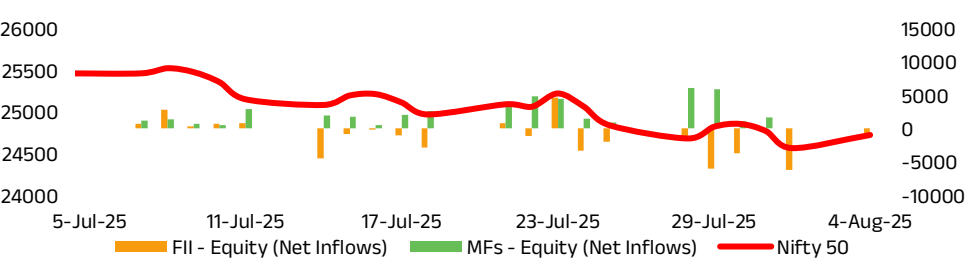
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	INR Cr.
				YTD
FII	-1445.44	-7,599	-25,339	-103,239
MF**	1619.09		47,019	278,086
DII	4386.29	7,573	68,512	416,988

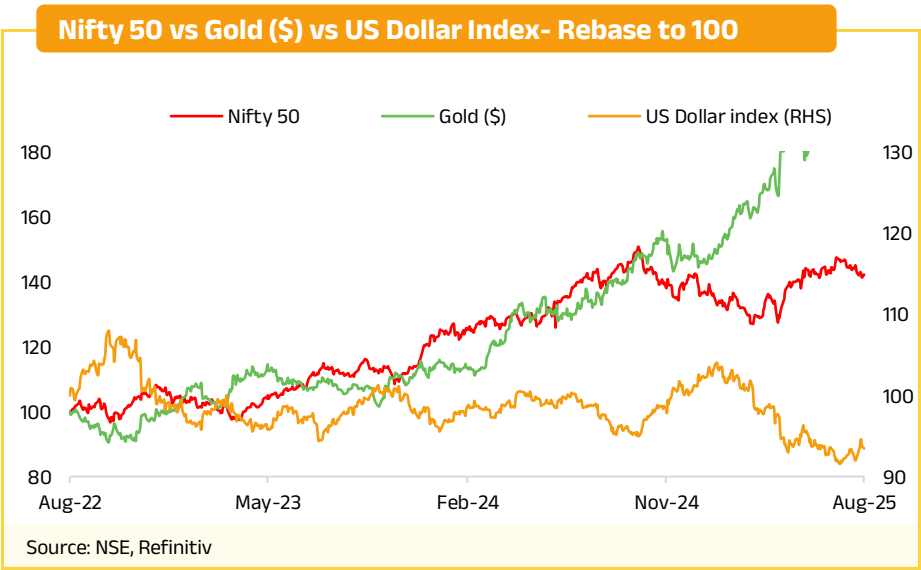
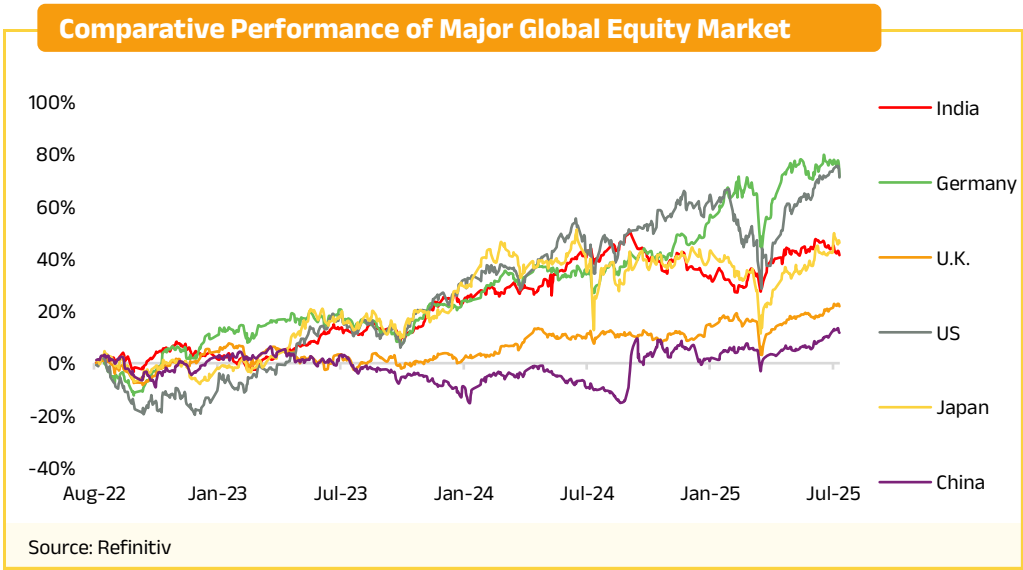
Source: SEBI, NSDL;\*\*As on 31st Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24793.10	24627.20	0.67%
Near Basis	70.35	61.85	13.74%
Mid Futures	24928.60	24774.60	0.62%
Mid Basis	205.85	209.25	-1.62%
Near Open Interest (Cr.)	1.65	1.69	-2.33%
Mid Open Interest (Cr.)	0.09	0.09	-0.90%
Rollover (%)	5.79	5.46	6.06%
Put Call Ratio (OI)	0.94	0.75	25.26%
Put Call Ratio(Vol)	0.85	0.97	-12.53%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2107	5928	35455
Index Options	1037537	1040268	265836
Stock Futures	18534	20370	363644
Stock Options	17980	17938	9524
Total	1076158	1084505	674459
Source: NSE			

Global Equity Market				
Global Indices	4-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3463.37	1.51%	-0.96%	0.75%
Nasdaq 100 (U.S.)	23188.61	1.87%	-0.72%	1.41%
FTSE (U.K.)	9128.30	0.66%	0.52%	3.46%
DAX Index (Germany)	23757.69	1.42%	-0.89%	-0.13%
CAC 40 Index (France)	7632.01	1.14%	-2.16%	-0.83%
SSE Composite (China)	3583.31	0.66%	-0.41%	3.20%
Nikkei (Japan)	40290.70	-1.25%	-1.73%	1.21%
Kospi (South Korea)	3147.75	0.91%	-1.92%	3.06%
HangSeng (Hong Kong)	24733.45	0.92%	-3.24%	3.42%
Strait Times (Singapore)	4197.23	1.04%	-1.04%	4.57%
Ibovespa Sao Paulo (Brazil)	132971.20	0.40%	0.64%	-5.87%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8663.70	0.02%	-0.39%	0.71%
Jakarta Composite (Indonesia)	7464.65	-0.97%	-1.97%	8.73%
KLSE (Malaysia)	1526.98	-0.42%	-0.16%	-1.50%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	4-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	99,515	1.78%	1.50%	3.01%
Gold (\$/oz)	3,372.79	0.31%	1.77%	1.09%
Silver (INR/1 kg)	111,504	1.91%	-1.18%	3.94%
Silver (\$/oz)	37.39	1.01%	-2.02%	1.31%
Brent Crude(\$/bbl)	71.34	-0.68%	-0.47%	-0.46%
Crude Oil (INR/1 bbl)	5,881.00	-3.02%	4.31%	2.65%
NYMEX Crude(\$/bbl)	67.23	-1.55%	-0.71%	-1.18%
Natural Gas (INR/1 mmbtu)	269.30	-0.96%	0.07%	-7.62%
Aluminium (INR/1 kg)	253.10	0.98%	-0.94%	1.36%
Copper (INR/1 kg)	889.40	0.65%	-0.51%	-0.64%
Nickel (INR/1 kg)	1,340.00	0.75%	0.19%	0.50%
Lead (INR/1 kg)	186.65	1.17%	0.62%	0.89%
Zinc (INR/1 kg)	267.30	0.96%	-0.54%	2.65%
Mentha Oil (INR/1 kg)	985.00	2.15%	4.00%	5.15%
Baltic Dry Index	1,970	-2.38%	-11.50%	37.19%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Defensive Sector Rotation

Definition: Defensive sectors include industries like FMCG, Healthcare, and Utilities that tend to perform steadily regardless of economic cycles due to consistent demand for their products and services.



Explanation

Equity markets are showing a clear rotation toward defensive sectors. FMCG and Healthcare have emerged as relative gainers, while cyclical sectors such as IT, Realty, and Capital Goods have underperformed. This shift reflects investor caution amid global trade tensions and foreign portfolio outflows. Domestic institutional investors, however, continue to support the market, favoring companies with stable earnings and low volatility. The move toward defensives suggests a preference for resilience and predictability, especially as macroeconomic uncertainties persist. Portfolio managers are rebalancing to reduce exposure to high-beta stocks and enhance downside protection.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-2.38	4.52	-0.58	14.82
Mid Cap Fund	-2.09	7.46	0.09	21.59
Large & Mid Cap Fund	-2.44	6.07	0.24	18.65
Small Cap Fund	-2.22	6.34	-1.18	21.79
Multi Cap Fund	-2.21	5.87	0.22	19.78
Focused Fund	-2.13	4.97	-0.12	16.32
Value Fund	-2.88	4.15	-3.08	20.10
Contra Fund	-2.45	4.92	-1.17	21.02
ELSS	-2.50	5.45	-0.59	17.57
Equity Savings	-0.33	3.91	5.01	9.91
Arbitrage Fund	0.43	3.11	6.48	6.75
Dividend Yield Fund	-3.16	3.34	-5.01	19.12
Aggressive Hybrid Fund	-1.57	5.31	1.96	14.85
Balanced Advantage	-1.25	4.23	1.97	11.90
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.				