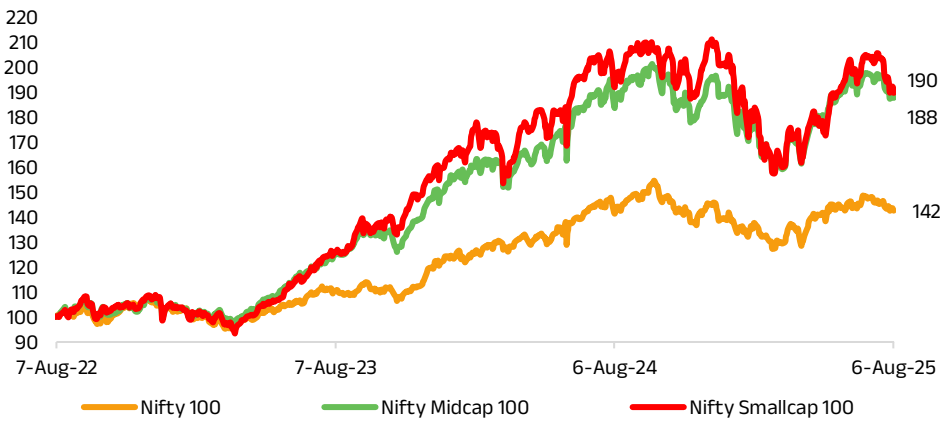


Broad Indices Historical Movement



Source: NSE

Broad Indices

	6-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,574.20	-0.31%	-1.13%	-3.48%
Nifty 100	25,156.35	-0.40%	-1.25%	-3.49%
Nifty 200	13,686.15	-0.47%	-1.39%	-3.73%
Nifty 500	22,666.85	-0.58%	-1.59%	-3.80%
Nifty Large Midcap 250	15,924.45	-0.65%	-1.66%	-3.74%
Nifty Midcap 150	21,096.65	-0.90%	-2.06%	-3.99%
Nifty Next 50	66,181.35	-0.87%	-1.86%	-3.54%
Nifty Smallcap 250	16,770.10	-1.20%	-3.07%	-5.59%

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

Smart Beta Index

Index	6-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,048.45	-0.44%	-0.85%	-4.44%
NIFTY 500 Value 50	13,756.50	-0.37%	-1.78%	-4.10%
Nifty 200 Quality 30	20,144.00	-0.58%	-0.50%	-4.52%
Nifty 50 Equal Weight	30,837.25	-0.52%	-0.81%	-3.44%
NIFTY Alpha Low Volatility 30	25,929.35	-0.98%	-2.02%	-4.50%
Nifty High Beta 50	3,617.50	-1.01%	-1.89%	-6.05%
Nifty Low Volatility 50	24,457.90	-0.66%	-1.41%	-3.73%
Nifty Midcap150 Momentum 50	60,448.90	-1.08%	-1.88%	-4.59%
Nifty PSE	9,584.25	-0.41%	-2.01%	-5.19%
Nifty SME Emerge	14,801.90	-0.99%	-2.21%	-0.60%
Nifty 100 ESG	4,831.20	-0.60%	-1.41%	-3.43%

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

Sector Indices

Index	6-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	23,748.85	-0.53%	0.01%	-0.97%
Nifty Bank	55,411.15	0.09%	-1.32%	-2.84%
Nifty Consumption	11,747.75	-0.36%	0.41%	-0.25%
Nifty Financial	26,371.15	-0.01%	-1.24%	-1.84%
Nifty FMCG	55,230.80	-0.90%	0.38%	0.90%
Nifty Healthcare	14,223.35	-1.78%	-5.43%	-3.35%
Nifty IT	34,426.25	-1.74%	-2.97%	-12.10%
Nifty Media	1,620.70	-1.18%	-0.25%	-8.01%
Nifty Metal	9,298.75	-0.40%	-1.07%	-2.94%
Nifty MNC	28,392.90	-1.13%	-1.23%	-1.76%
Nifty Pharma	21,523.75	-2.03%	-6.72%	-3.85%
Nifty Realty	894.15	-1.51%	-2.56%	-8.00%
Nifty Energy	34,683.35	-0.66%	-2.09%	-5.00%

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

Nifty 50 Top 5 Gainers

Company	6-Aug-25	Prev_Day	% Change	1 Week
Asian Paints	2,491.20	2,436.80	2.23	3.12
HDFC Standard Life Insurance C	752.55	738.50	1.90	-0.65
Shree Cements Limited	30,570.00	30,205.00	1.21	-0.07
Indian Oil	142.27	141.27	0.71	-4.54
Adani Ports & SEZ	1,367.10	1,358.10	0.66	-1.93

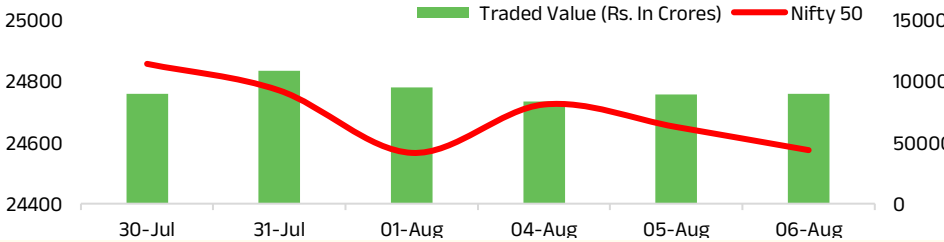
Source: NSE

Nifty 50 Top 5 Losers

Company	6-Aug-25	Prev_Day	% Change	1 Week
Divi's Lab	6,133.50	6409	-4.30	-7.77
Britannia Industries Lim	5,402.50	5636	-4.13	-5.99
Wipro	239.96	246	-2.42	-4.09
Sun Pharma	1,595.20	1632	-2.26	-7.99
United Phos	705.30	720	-2.10	-2.30

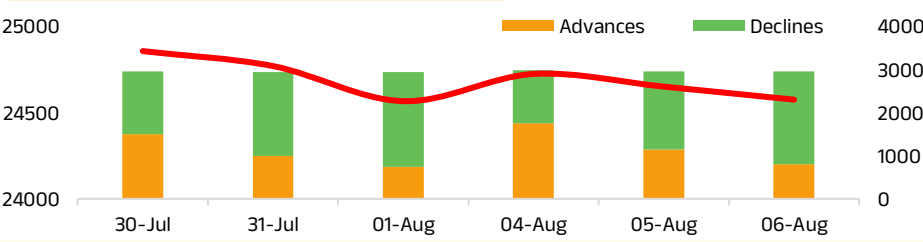
Source: NSE

Nifty 50 vs NSE Trading Volume




Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

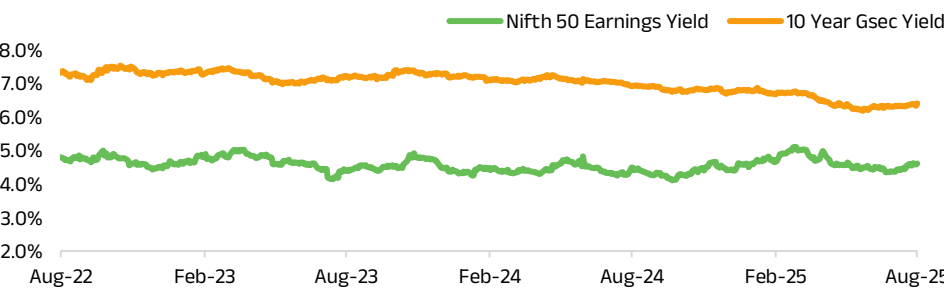
 Indian equity markets declined after the U.S. President warned of a 'very substantial' increase in tariffs on Indian imports within the next 24 hours, citing India's continued purchases of Russian oil as the reason for the potential escalation. He also signalled upcoming tariffs on semiconductor and chip imports to boost U.S. manufacturing and warned that pharmaceutical tariffs could reach 250%.

 Hindustan Power has signed a Power Purchase Agreement (PPA) with Uttar Pradesh Power Corporation Ltd (UPPCL) to set up a 435 MW direct current solar project. The agreement includes the supply of clean power for 25 years from the project, which will be established in Uttar Pradesh, the company said in a statement.

 Power Finance Corporation (PFC) reported a 24% YoY increase in consolidated net profit attributable to owners, reaching Rs. 6,866.26 crore for the first quarter of the financial year 2025–26 (Q1 FY26), up from Rs. 5,543.14 crore in the corresponding quarter last year. On QoQ basis, profit rose 8.7%, compared to Rs. 6,316.45 crore in Q4 FY25.

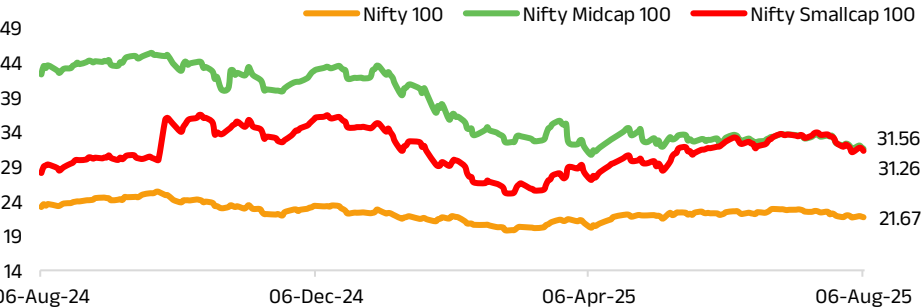
 Bajaj Auto reported a 14% YoY increase in consolidated net profit to Rs. 2,210 crore for Q1 FY26. Revenue from operations rose 10% YoY to Rs. 13,133 crore. The growth was driven by strong exports, particularly in premium motorcycles, commercial vehicles, and the Chetak EV. Sequentially, net profit increased by 22%, while revenue rose by 4%.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



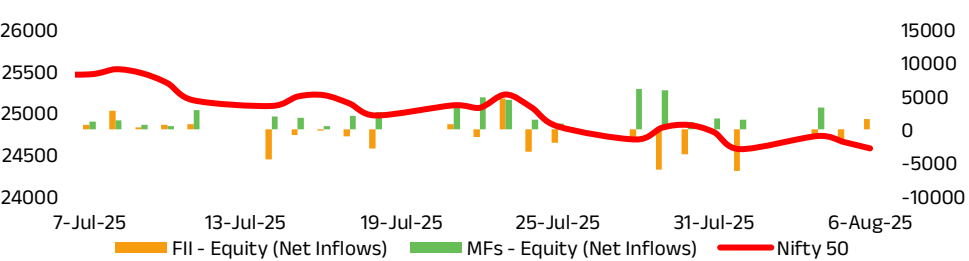
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1561.31	-8,005	-25,746	-103,646
MF**	3264.69	4,747	51,766	282,834
DII	6794.28	18,208	79,147	427,622

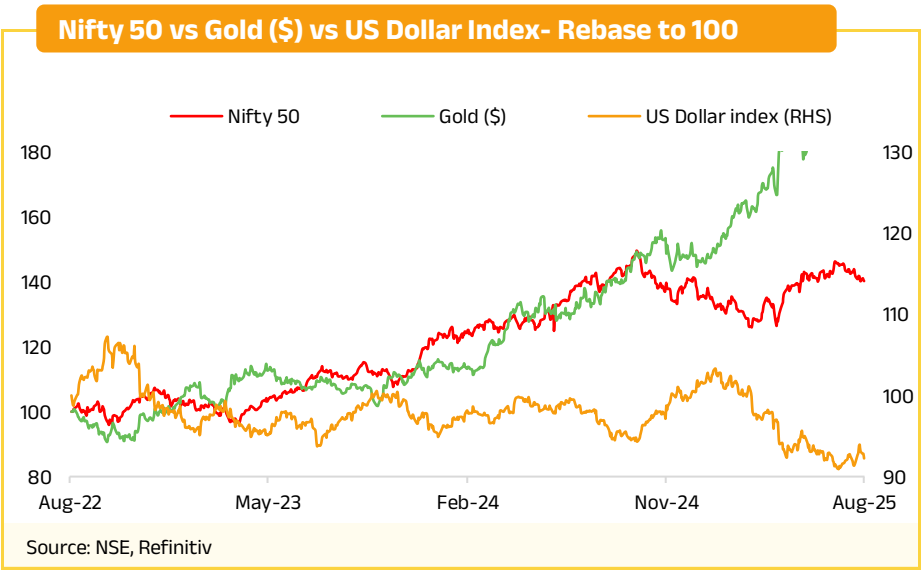
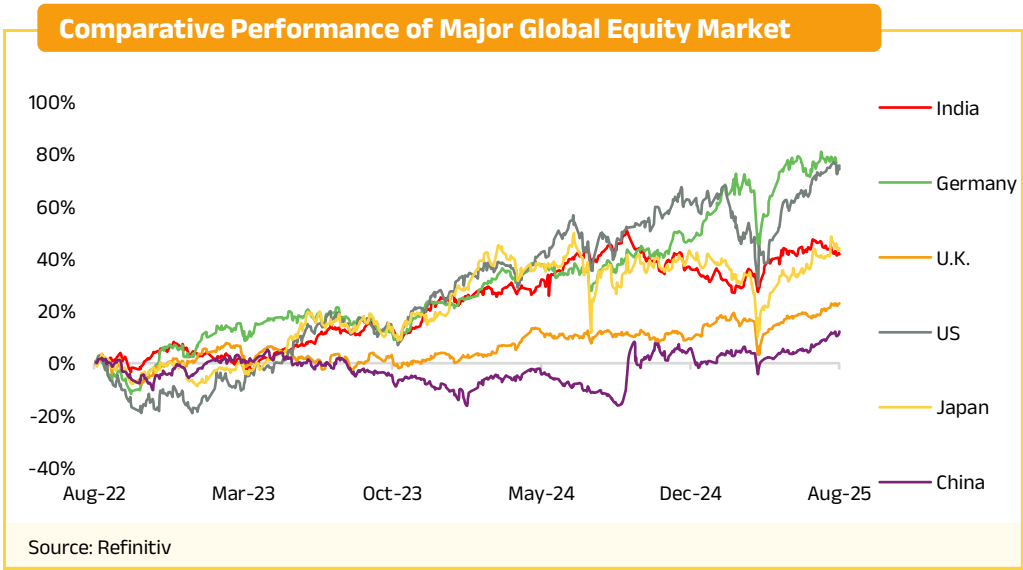
Source: SEBI, NSDL;\*\*As on 4th Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24634.90	24707.80	-0.30%
Near Basis	60.70	58.25	4.21%
Mid Futures	24769.80	24846.10	-0.31%
Mid Basis	195.60	196.55	-0.48%
Near Open Interest (Cr.)	1.67	1.66	0.48%
Mid Open Interest (Cr.)	0.09	0.09	2.14%
Rollover (%)	6.10	5.87	3.90%
Put Call Ratio (OI)	0.74	0.83	-10.73%
Put Call Ratio(Vol)	0.98	0.97	1.17%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1534	3804	37864
Index Options	1762881	1786788	272704
Stock Futures	16981	20255	366244
Stock Options	18034	17731	14843
Total	1799431	1828578	691656
Source: NSE			

Global Equity Market				
Global Indices	6-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3470.85	0.69%	-0.30%	0.97%
Nasdaq 100 (U.S.)	23315.04	1.29%	-0.13%	1.96%
FTSE (U.K.)	9164.31	0.24%	0.30%	3.87%
DAX Index (Germany)	23924.36	0.33%	-1.39%	0.58%
CAC 40 Index (France)	7635.03	0.18%	-2.89%	-0.80%
SSE Composite (China)	3633.99	0.45%	0.51%	4.66%
Nikkei (Japan)	40794.86	0.60%	0.34%	2.47%
Kospi (South Korea)	3198.14	0.00%	-1.73%	4.71%
HangSeng (Hong Kong)	24910.63	0.03%	-1.06%	4.16%
Strait Times (Singapore)	4227.70	0.45%	0.20%	5.33%
Ibovespa Sao Paulo (Brazil)	134537.62	1.04%	0.41%	-4.76%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8843.70	0.84%	1.00%	2.80%
Jakarta Composite (Indonesia)	7503.75	-0.15%	-0.61%	9.30%
KLSE (Malaysia)	1541.48	0.18%	1.11%	-0.56%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	6-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	99,977	0.22%	1.38%	3.49%
Gold (\$/oz)	3,368.51	-0.36%	2.86%	0.96%
Silver (INR/1 kg)	113,215	0.99%	-0.17%	5.54%
Silver (\$/oz)	37.85	0.04%	1.95%	2.55%
Brent Crude(\$/bbl)	71.03	1.47%	-5.05%	-0.89%
Crude Oil (INR/1 bbl)	5,721.00	-1.36%	-4.81%	-0.14%
NYMEX Crude(\$/bbl)	65.28	-1.24%	-8.04%	-4.04%
Natural Gas (INR/1 mmbtu)	264.30	3.00%	-3.15%	-9.33%
Aluminium (INR/1 kg)	252.15	-0.18%	-1.06%	0.98%
Copper (INR/1 kg)	884.70	-0.19%	-1.70%	-1.17%
Nickel (INR/1 kg)	1,341.30	1.15%	0.14%	0.60%
Lead (INR/1 kg)	185.00	-0.05%	0.82%	0.00%
Zinc (INR/1 kg)	270.00	-0.39%	-0.18%	3.69%
Mentha Oil (INR/1 kg)	987.70	-0.50%	2.76%	5.43%
Baltic Dry Index	1,994	3.80%	-0.05%	38.86%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Valuation Divergence Across Market

Definition: Valuation divergence refers to the difference in valuation metrics (like P/E and P/B ratios) across large-cap, mid-cap, and small-cap equity segments.



Explanation

Recent internal equity data reveals that while large-cap indices like BSE Sensex and BSE-100 maintain moderate valuations, mid-cap and small-cap indices are trading at elevated P/E and P/B levels. This divergence suggests that investors are pricing in higher growth expectations for smaller companies, possibly driven by domestic consumption trends, policy tailwinds, or sector-specific optimism. However, it also raises caution about overheating in certain pockets of the market. Analysts and fund managers often use this divergence to identify rotation opportunities or to adjust exposure based on valuation comfort and earnings visibility.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-3.09	4.28	1.87	14.47
Mid Cap Fund	-3.04	6.62	3.05	21.10
Large & Mid Cap Fund	-3.21	5.51	3.07	18.24
Small Cap Fund	-3.52	4.00	1.35	21.18
Multi Cap Fund	-3.17	4.86	2.76	19.32
Focused Fund	-2.98	4.28	2.48	15.89
Value Fund	-3.66	3.17	-0.41	19.67
Contra Fund	-3.06	4.25	1.63	20.62
ELSS	-3.38	4.38	1.98	17.12
Equity Savings	-0.46	3.77	5.96	9.84
Arbitrage Fund	0.49	3.14	6.61	6.76
Dividend Yield Fund	-3.57	2.85	-2.09	18.88
Aggressive Hybrid Fund	-2.19	4.63	3.94	14.55
Balanced Advantage	-1.79	3.73	3.23	11.66
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.				