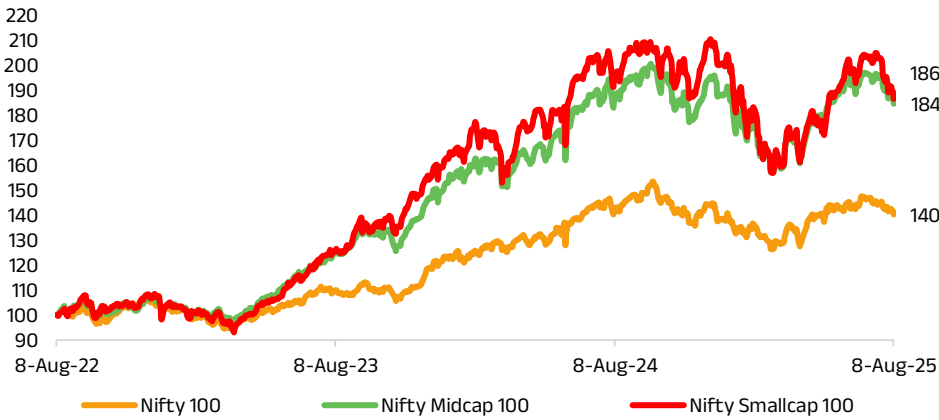


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,363.30	-0.95%	-0.82%	-4.54%
Nifty 100	24,934.05	-1.00%	-0.86%	-4.56%
Nifty 200	13,555.15	-1.11%	-0.90%	-4.76%
Nifty 500	22,443.15	-1.11%	-1.02%	-4.79%
Nifty Large Midcap 250	15,760.30	-1.22%	-1.00%	-4.65%
Nifty Midcap 150	20,848.25	-1.44%	-1.14%	-4.74%
Nifty Next 50	65,514.70	-1.24%	-1.02%	-4.66%
Nifty Smallcap 250	16,541.90	-1.26%	-1.91%	-6.46%

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

Smart Beta Index

Index	8-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,703.30	-1.47%	-0.54%	-5.49%
NIFTY 500 Value 50	13,663.65	-0.60%	0.27%	-4.82%
Nifty 200 Quality 30	20,075.65	-0.75%	-0.03%	-5.08%
Nifty 50 Equal Weight	30,613.45	-0.87%	-0.15%	-4.17%
NIFTY Alpha Low Volatility 30	25,823.80	-0.82%	-0.89%	-4.97%
Nifty High Beta 50	3,533.85	-2.12%	-1.57%	-7.79%
Nifty Low Volatility 50	24,298.40	-0.98%	-0.99%	-4.55%
Nifty Midcap150 Momentum 50	59,780.00	-1.48%	-1.15%	-4.89%
Nifty PSE	9,529.40	-0.12%	-0.09%	-6.21%
Nifty SME Emerge	14,813.90	0.14%	-1.64%	-0.31%
Nifty 100 ESG	4,794.50	-0.96%	-0.72%	-4.21%

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

Sector Indices

Index	8-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	23,474.65	-1.40%	0.27%	-1.59%
Nifty Bank	55,004.90	-0.93%	-1.10%	-3.93%
Nifty Consumption	11,647.10	-1.07%	-0.43%	-1.20%
Nifty Financial	26,167.35	-0.90%	-1.23%	-3.14%
Nifty FMCG	54,900.95	-0.72%	-2.31%	-1.09%
Nifty Healthcare	14,135.55	-1.22%	-2.30%	-3.10%
Nifty IT	34,398.50	-0.95%	-0.72%	-11.76%
Nifty Media	1,635.10	-0.10%	1.13%	-6.11%
Nifty Metal	9,147.10	-1.76%	0.49%	-3.89%
Nifty MNC	28,134.05	-1.00%	-1.92%	-2.87%
Nifty Pharma	21,402.15	-1.30%	-2.77%	-3.45%
Nifty Realty	874.15	-2.11%	-2.45%	-11.01%
Nifty Energy	34,391.95	-0.64%	-1.42%	-6.05%

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

Nifty 50 Top 5 Gainers

Company	8-Aug-25	Prev_Day	% Change	1 Week
BPCL	319.45	310.35	2.93	0.50
NTPC	334.75	329.75	1.52	1.16
Titan Industries Limited	3,460.20	3,415.70	1.30	4.35
HDFC Standard Life Insurance C	761.55	755.70	0.77	2.68
ITC	414.50	413.60	0.22	-0.47

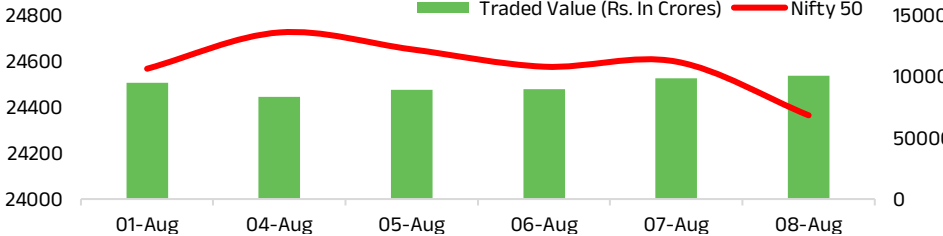
Source: NSE

Nifty 50 Top 5 Losers

Company	8-Aug-25	Prev_Day	% Change	1 Week
Divi's Lab	5,914.50	6132	-3.54	-7.03
Bharti Airtel	1,858.60	1923	-3.33	-1.37
IndusInd Bank	782.45	807	-3.08	-0.16
United Phos	688.75	705	-2.37	3.55
M&M	3,144.20	3211	-2.08	-0.48

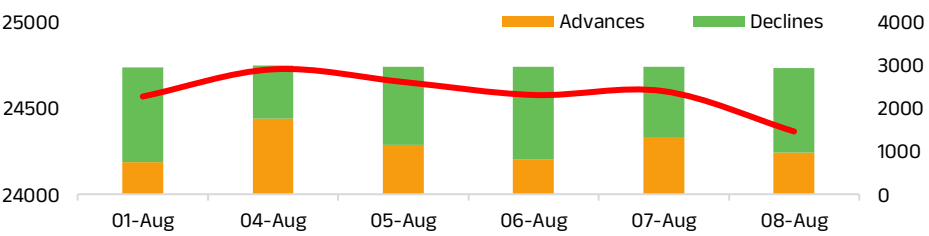
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

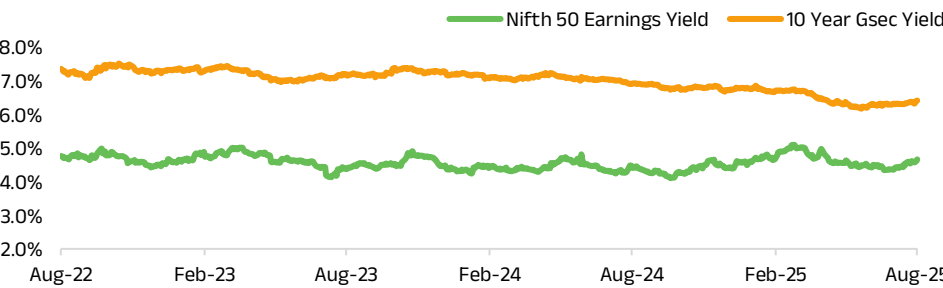
Indian equity markets fell sharply after the U.S. President unexpectedly doubled tariffs on Indian exports. Investor sentiment weakened as the 50% tariff hike threatened India's manufacturing push and could slow economic growth. Losses were extended amid escalating trade tensions, with expectations that foreign institutional investors may further reduce their exposure to the cash market.

State Bank of India (SBI) reported a 6% YoY growth in interest income to Rs. 1,17,996 crore for Q1FY26, while interest expenses rose 9% to Rs. 76,923 crore. The profit growth was attributed to operating efficiency and controlled expenses.

Tata Motors reported a 63% YoY decline in its Q1FY26 consolidated net profit to Rs. 3,924 crore, compared to Rs.10,514 crore in the same period last year. However, the profit attributable to shareholders came in above Street estimates of Rs. 3,408 crore.

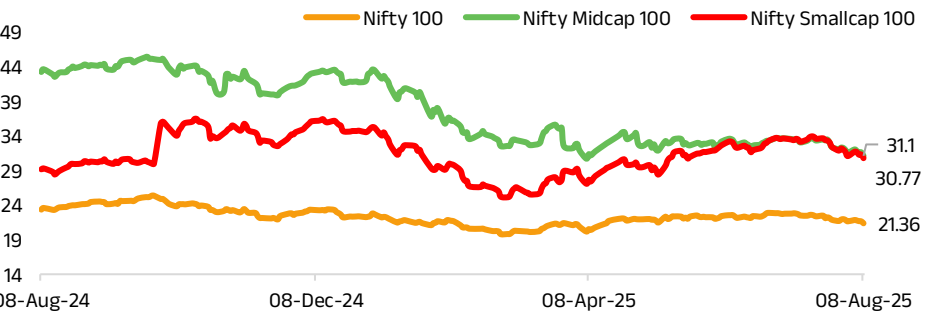
Voltas Ltd reported a 58% decline in its consolidated net profit to Rs. 140.61 crore for the Jun quarter of 2025, as unseasonal rains and the early arrival of the monsoon adversely impacted its cooling products business.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



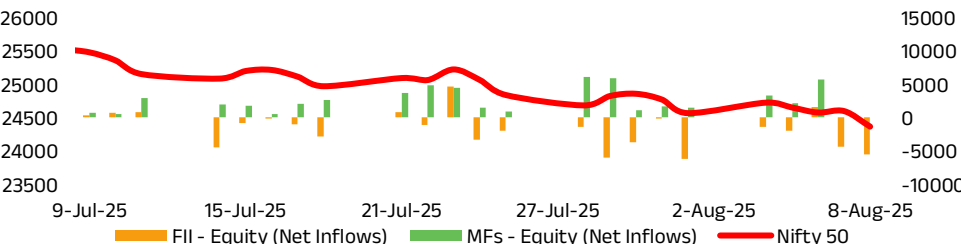
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	-5519.81	-17,924	-35,664	-113,564
MF**	5710.25	12,558	59,577	290,645
DII	7723.66	36,796	97,735	446,210

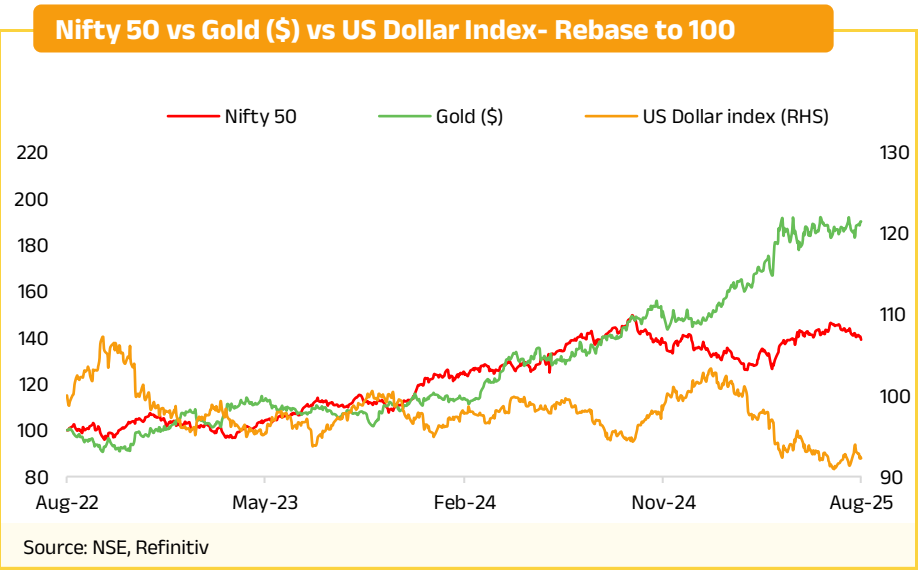
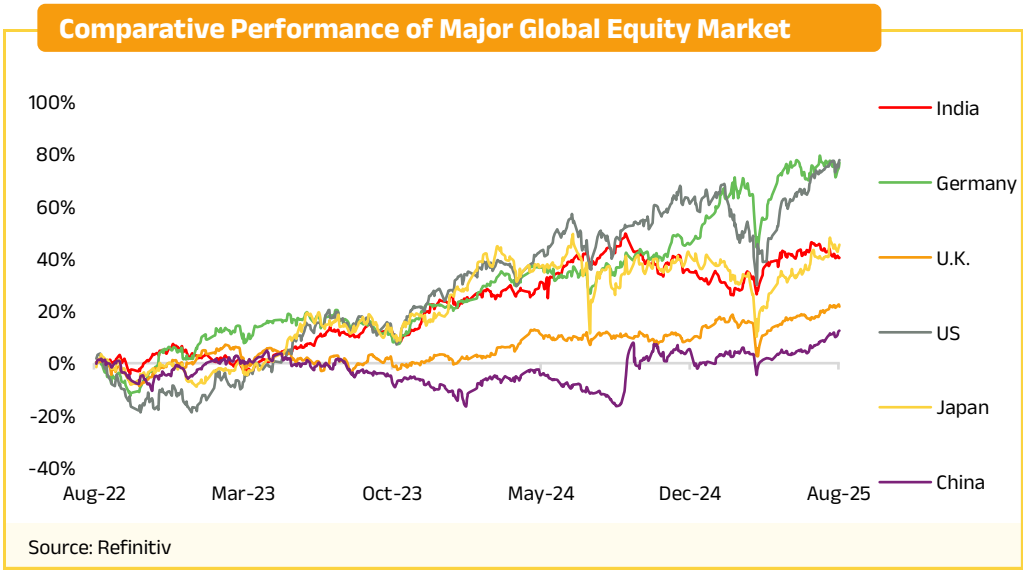
Source: SEBI, NSDL;**As on 6th Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24441.10	24673.40	-0.94%
Near Basis	77.80	77.25	0.71%
Mid Futures	24576.80	24805.90	-0.92%
Mid Basis	213.50	209.75	1.79%
Near Open Interest (Cr.)	1.72	1.68	2.94%
Mid Open Interest (Cr.)	0.10	0.10	7.25%
Rollover (%)	6.80	6.49	4.81%
Put Call Ratio (OI)	0.66	0.92	-28.30%
Put Call Ratio(Vol)	1.11	0.91	21.87%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3031	4158	38991
Index Options	3074790	3068985	232088
Stock Futures	21561	20321	369398
Stock Options	19174	19207	17111
Total	3118555	3112670	657588
Source: NSE			

Global Equity Market				
Global Indices	8-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3491.96	0.68%	2.34%	2.45%
Nasdaq 100 (U.S.)	23611.27	0.95%	3.73%	4.00%
FTSE (U.K.)	9095.73	-0.06%	0.30%	2.73%
DAX Index (Germany)	24162.86	-0.12%	3.15%	-0.18%
CAC 40 Index (France)	7743.00	0.44%	2.61%	-0.31%
SSE Composite (China)	3635.13	-0.12%	2.11%	3.94%
Nikkei (Japan)	41820.48	1.85%	2.50%	5.37%
Kospi (South Korea)	3210.01	-0.55%	2.90%	3.05%
HangSeng (Hong Kong)	24858.82	-0.89%	1.43%	2.94%
Strait Times (Singapore)	4239.83	-0.43%	2.07%	4.74%
Ibovespa Sao Paulo (Brazil)	135913.25	-0.45%	2.62%	-2.43%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8807.10	-0.28%	1.68%	2.52%
Jakarta Composite (Indonesia)	7533.39	0.58%	-0.06%	9.11%
KLSE (Malaysia)	1556.98	0.51%	1.54%	1.75%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	8-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	100,672	0.54%	2.97%	4.28%
Gold (\$/oz)	3,398.41	0.04%	1.07%	2.97%
Silver (INR/1 kg)	114,746	-0.30%	4.87%	6.86%
Silver (\$/oz)	38.33	0.04%	3.53%	4.20%
Brent Crude(\$/bbl)	68.48	-0.88%	-4.66%	-7.41%
Crude Oil (INR/1 bbl)	5,602.00	-0.73%	-7.62%	-3.89%
NYMEX Crude(\$/bbl)	64.84	0.06%	-5.05%	-6.64%
Natural Gas (INR/1 mmbtu)	269.00	-0.33%	-1.07%	-8.13%
Aluminium (INR/1 kg)	255.00	-0.20%	1.74%	2.62%
Copper (INR/1 kg)	887.00	-0.22%	0.38%	-1.28%
Nickel (INR/1 kg)	1,342.50	-0.10%	0.94%	1.45%
Lead (INR/1 kg)	183.75	-0.33%	-0.41%	0.49%
Zinc (INR/1 kg)	271.35	-0.42%	2.49%	5.34%
Mentha Oil (INR/1 kg)	1,014.40	2.62%	5.20%	8.41%
Baltic Dry Index	2,051	2.14%	1.64%	43.33%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Price-to-Book Ratio (P/B Ratio)

Definition: The Price-to-Book Ratio compares a **company's** market value to its book value. It is calculated by dividing the current share price by the book value per share.



Explanation

P/B ratio helps investors assess whether a stock is undervalued or overvalued relative to its net assets. A ratio below 1 may indicate undervaluation, especially in asset-heavy industries like banking or manufacturing. However, low P/B can also reflect poor future prospects. High P/B ratios are common in sectors with intangible assets (e.g., tech), where book value **doesn't** capture full business potential. Portfolio managers use P/B alongside other metrics like ROE and earnings growth to evaluate value versus growth opportunities. **It's** particularly useful in screening for turnaround candidates or identifying bubbles in overheated sectors.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-4.06	3.55	0.07	13.92
Mid Cap Fund	-3.59	5.49	0.36	20.67
Large & Mid Cap Fund	-3.95	4.58	0.64	17.74
Small Cap Fund	-4.25	3.46	-1.59	20.58
Multi Cap Fund	-3.97	4.10	0.25	18.81
Focused Fund	-3.79	3.43	0.31	15.35
Value Fund	-4.39	2.65	-2.38	19.16
Contra Fund	-3.62	3.86	-0.08	20.28
ELSS	-4.10	3.76	-0.18	16.62
Equity Savings	-0.71	3.54	5.22	9.68
Arbitrage Fund	0.51	3.13	6.51	6.78
Dividend Yield Fund	-4.32	2.31	-3.91	18.47
Aggressive Hybrid Fund	-2.95	4.00	2.16	14.11
Balanced Advantage	-2.37	3.25	1.97	11.34
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.				