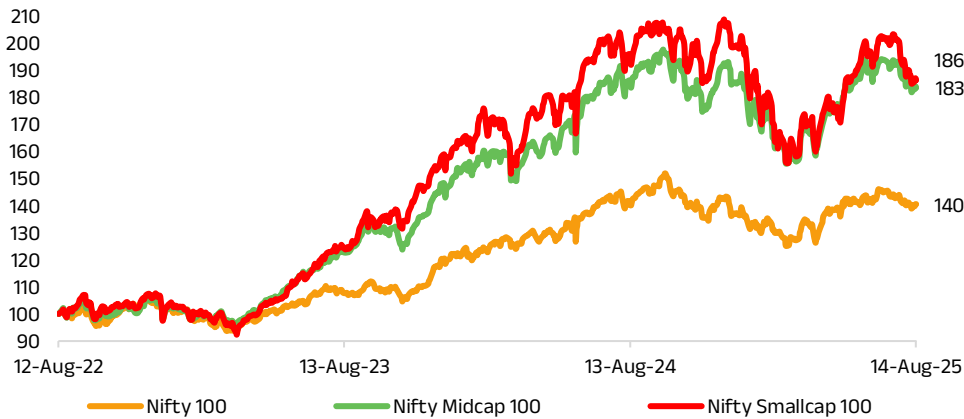


Broad Indices Historical Movement



Source: NSE

Broad Indices

	14-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,631.30	0.05%	1.10%	-2.24%
Nifty 100	25,226.25	0.01%	1.17%	-2.41%
Nifty 200	13,707.70	-0.04%	1.13%	-2.89%
Nifty 500	22,680.25	-0.08%	1.06%	-3.28%
Nifty Large Midcap 250	15,916.50	-0.11%	0.99%	-3.39%
Nifty Midcap 150	21,017.05	-0.24%	0.81%	-4.36%
Nifty Next 50	66,511.60	-0.17%	1.52%	-3.22%
Nifty Smallcap 250	16,656.75	-0.43%	0.69%	-7.22%

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

Smart Beta Index

Index	14-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,218.85	0.20%	1.74%	-2.98%
NIFTY 500 Value 50	13,803.45	-0.73%	1.02%	-3.55%
Nifty 200 Quality 30	20,143.50	-0.25%	0.34%	-3.96%
Nifty 50 Equal Weight	31,100.20	-0.09%	1.59%	-1.75%
NIFTY Alpha Low Volatility 30	26,169.60	0.06%	1.34%	-2.72%
Nifty High Beta 50	3,546.95	-0.65%	0.37%	-7.71%
Nifty Low Volatility 50	24,526.50	-0.07%	0.94%	-2.89%
Nifty Midcap150 Momentum 50	60,478.25	0.04%	1.17%	-3.52%
Nifty PSE	9,583.30	-0.70%	0.57%	-4.83%
Nifty SME Emerge	14,897.95	-0.14%	0.57%	-1.10%
Nifty 100 ESG	4,861.30	0.14%	1.39%	-1.97%

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

Sector Indices

Index	14-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	24,118.80	-0.02%	2.74%	0.89%
Nifty Bank	55,341.85	0.29%	0.61%	-2.92%
Nifty Consumption	11,839.90	-0.04%	1.66%	0.77%
Nifty Financial	26,333.45	0.36%	0.63%	-2.21%
Nifty FMCG	54,656.30	-0.64%	-0.45%	-3.14%
Nifty Healthcare	14,644.90	-0.32%	3.60%	-0.97%
Nifty IT	34,833.20	0.40%	1.26%	-6.92%
Nifty Media	1,653.15	-0.53%	1.10%	-4.76%
Nifty Metal	9,216.25	-1.39%	0.76%	-2.08%
Nifty MNC	28,286.60	-0.43%	0.54%	-3.10%
Nifty Pharma	22,151.85	0.10%	3.50%	-2.27%
Nifty Realty	879.35	-0.76%	0.59%	-10.63%
Nifty Energy	34,469.05	-0.78%	0.22%	-5.07%

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

Nifty 50 Top 5 Gainers

Company	14-Aug-25	Prev_Day	% Change	1 Week
Wipro	246.81	241.65	2.14	3.25
HDFC Standard Life Insurance Co.	788.75	776.60	1.56	3.57
Infosys	1,447.70	1,426.60	1.48	1.73
Asian Paints	2,528.70	2,500.20	1.14	2.14
Eicher Motors Limited	5,764.00	5,714.50	0.87	1.78

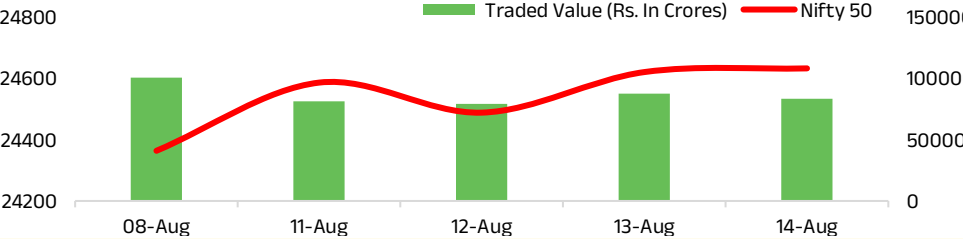
Source: NSE

Nifty 50 Top 5 Losers

Company	14-Aug-25	Prev_Day	% Change	1 Week
Indian Oil	140.13	142	-1.61	0.16
Adani Ports & SEZ	1,300.30	1320	-1.46	-1.86
BPCL	318.05	323	-1.38	-0.44
Britannia Industries Limited	5,302.50	5376	-1.36	-1.57
Tech Mahindra	1,486.70	1506	-1.30	0.43

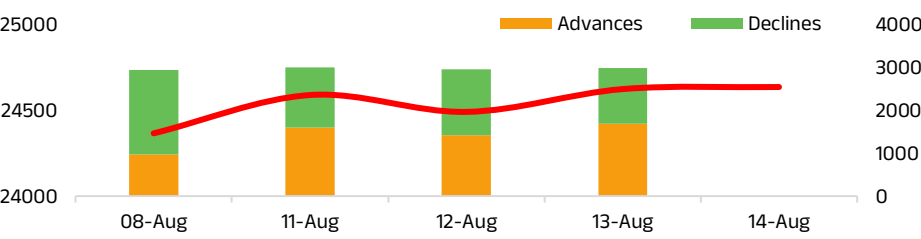
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

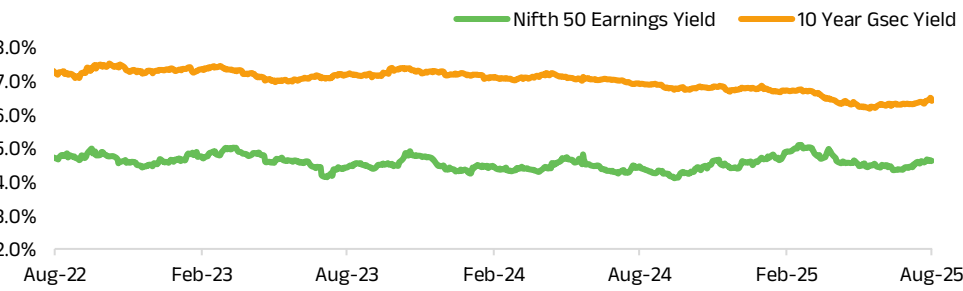
Indian equity markets rose marginally, tracking mixed cues from global markets. Meanwhile, investors assessed the potential impact of the U.S.-Russia summit on Ukraine, scheduled for Aug 15, 2025, on Russian crude oil flows.

Ashok Leyland reported a standalone net profit of Rs. 593.73 crore for Q1FY26, marking a 13% YoY increase from Rs. 525.58 crore in the same period last year. Standalone revenue from operations for the quarter ended Jun 2025 stood at Rs. 8,724.51 crore, a marginal 1.5% rise YoY compared to Rs. 8,598.53 crore in the Jun 2024 quarter.

Indian Railway Catering and Tourism Corporation (IRCTC) reported an 8% YoY increase in consolidated net profit for the quarter ended Jun 30, 2025, at Rs. 331 crore, compared to Rs. 308 crore in the same quarter last year. However, sequentially, net profit declined from Rs. 358 crore in the Mar 2025 quarter.

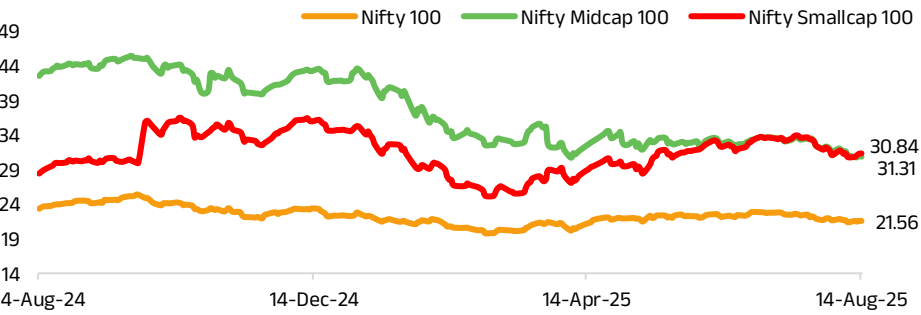
Muthoot Finance reported a 90% YoY surge in standalone net profit for the first quarter of 2025, reaching Rs. 2,046 crore compared to Rs. 1,079 crore in the same period last year. The sharp increase was driven by robust business expansion and a significant reduction in provisions.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



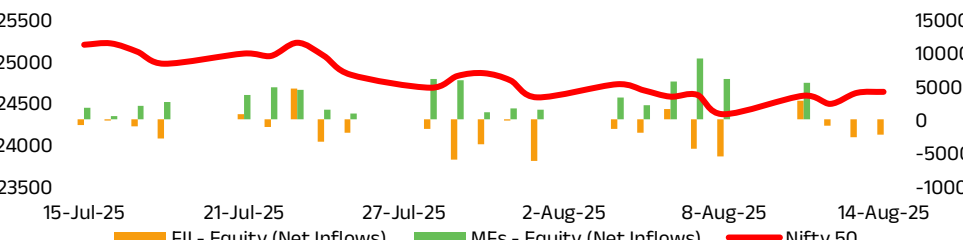
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII's & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII*	-2264.38	-20,975	-38,715	-116,616
MF**	5471.84	33,223	80,242	311,310
DII*	3895.68	55,795	116,734	465,210

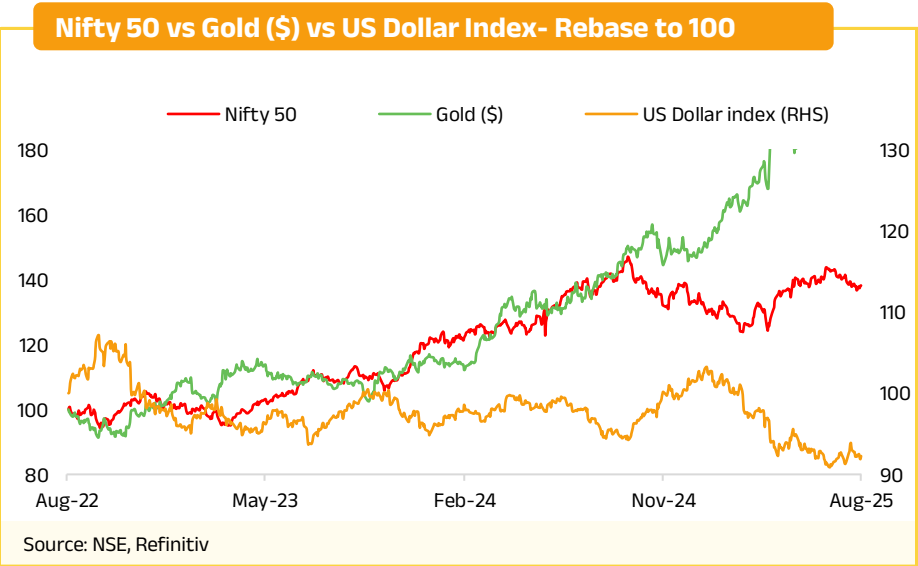
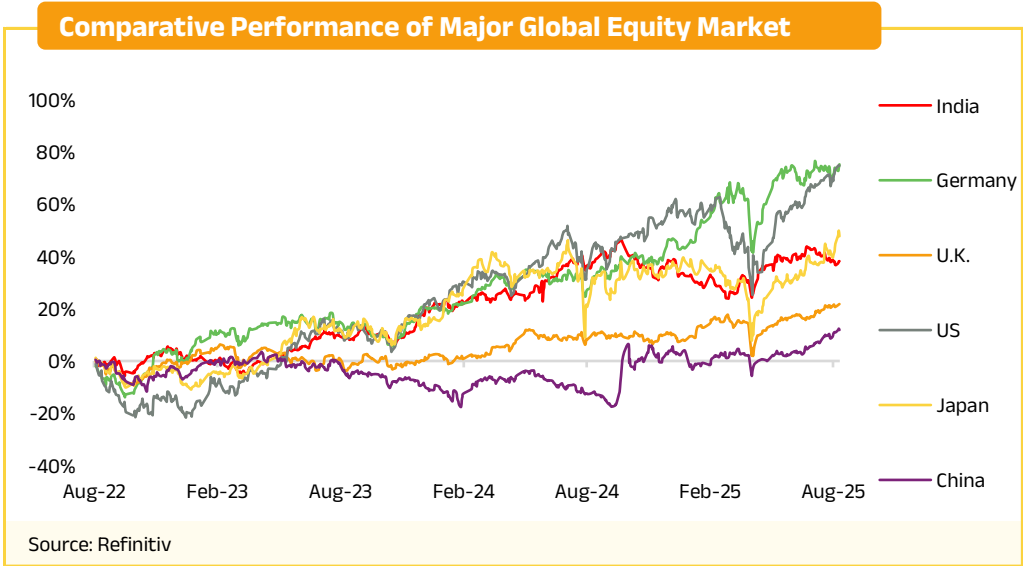
Source: SEBI, NSDL;\*As on 14th Aug 2025;\*\*As on 11th Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24684.70	24684.70	0.00%
Near Basis	53.40	53.40	0.00%
Mid Futures	24822.50	24822.50	0.00%
Mid Basis	191.20	191.20	0.00%
Near Open Interest (Cr.)	1.67	1.67	0.00%
Mid Open Interest (Cr.)	0.12	0.12	0.00%
Rollover (%)	8.16	8.16	0.00%
Put Call Ratio (OI)	0.96	1.08	-10.52%
Put Call Ratio(Vol)	1.02	0.89	14.60%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2087	1622	41209
Index Options	1164362	1171366	347748
Stock Futures	22715	20123	379140
Stock Options	20667	19989	23220
Total	1209830	1213100	791317
Source: NSE			

Global Equity Market				
Global Indices	15-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3525.97	-0.26%	0.97%	3.24%
Nasdaq 100 (U.S.)	23712.07	-0.51%	0.43%	3.62%
FTSE (U.K.)	9138.90	-0.42%	0.47%	2.24%
DAX Index (Germany)	24359.30	-0.07%	0.81%	1.24%
CAC 40 Index (France)	7923.45	0.67%	2.33%	2.02%
SSE Composite (China)	3696.77	0.83%	1.70%	5.47%
Nikkei (Japan)	43378.31	1.71%	3.73%	9.33%
Kospi (South Korea) <sup>[1]</sup>	3225.66	0.04%	0.49%	0.32%
HangSeng (Hong Kong)	25270.07	-0.98%	1.65%	2.77%
Strait Times (Singapore)	4230.53	-0.61%	-0.22%	2.69%
Ibovespa Sao Paulo (Brazil)	136340.77	-0.01%	0.31%	0.81%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8938.60	0.73%	1.49%	3.57%
Jakarta Composite (Indonesia)	7898.38	-0.41%	4.84%	10.61%
KLSE (Malaysia)	1576.34	-0.30%	1.24%	3.34%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	15-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm) <sup>[1]</sup>	99,665	-0.06%	-1.00%	2.11%
Gold (\$/oz)	3,334.98	-0.02%	-1.87%	0.39%
Silver (INR/1 kg) <sup>[1]</sup>	114,810	-0.26%	0.06%	2.68%
Silver (\$/oz)	37.99	0.00%	-0.87%	0.73%
Brent Crude(\$/bbl)	68.87	-0.48%	0.57%	-4.67%
Crude Oil (INR/1 bbl) <sup>[1]</sup>	5,494.00	-0.79%	-1.93%	-4.62%
NYMEX Crude(\$/bbl)	63.68	-1.86%	-1.79%	-5.88%
Natural Gas (INR/1 mmbtu)	248.00	0.73%	-7.81%	-16.78%
Aluminium (INR/1 kg) <sup>[1]</sup>	254.85	-0.12%	-0.06%	2.39%
Copper (INR/1 kg) <sup>[1]</sup>	894.80	-0.12%	0.88%	1.98%
Nickel (INR/1 kg) <sup>[1]</sup>	1,341.40	-0.89%	-0.08%	1.88%
Lead (INR/1 kg) <sup>[1]</sup>	185.15	-1.10%	0.76%	1.37%
Zinc (INR/1 kg) <sup>[1]</sup>	273.00	-0.64%	0.61%	5.30%
Mentha Oil (INR/1 kg) <sup>[1]</sup>	1,039.20	1.75%	2.44%	12.29%
Baltic Dry Index	2,044	0.25%	-0.34%	9.54%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Defensive Stocks

Definition: Defensive stocks are those that provide consistent returns regardless of the overall state of the economy.



Explanation

These stocks belong to companies that offer essential goods or services—such as utilities, healthcare, and consumer staples—which people continue to use even during economic downturns. Because demand for these products remains stable, the revenues and profits of defensive companies are relatively unaffected by economic cycles. As a result, their stock prices tend to be more stable compared to cyclical stocks. Defensive stocks are favored by conservative investors or those seeking to preserve capital during volatile market conditions. While they may not offer high growth potential, they provide a cushion during recessions and are often used to balance risk in a diversified portfolio.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-2.08	8.84	1.41	13.98
Flexi Cap Fund	-2.61	10.02	0.73	15.70
Mid Cap Fund	-3.03	14.77	1.38	20.58
Large & Mid Cap Fund	-2.85	11.91	1.49	17.66
Small Cap Fund	-5.10	13.28	-1.01	20.44
Multi Cap Fund	-3.18	11.84	1.31	18.83
Focused Fund	-2.63	9.71	1.21	15.33
Value Fund	-3.60	8.88	-1.43	18.98
Contra Fund	-2.64	10.12	0.76	20.21
ELSS	-3.11	10.56	0.77	16.51
Equity Savings	-0.29	5.53	5.46	9.64
Arbitrage Fund	0.51	3.12	6.54	6.77
Dividend Yield Fund	-3.09	8.25	-3.03	18.46
Aggressive Hybrid Fund	-1.89	8.87	2.89	14.05
Balanced Advantage	-1.47	6.79	2.67	11.36
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.				

<sup>[1]</sup>Data as on 14 Aug, 2025