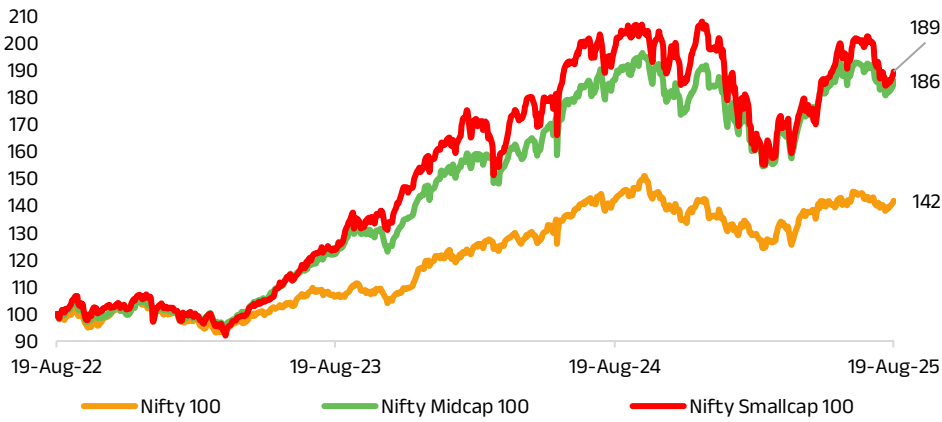


Broad Indices Historical Movement



Source: NSE

Broad Indices

	19-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,980.65	0.42%	2.01%	0.05%
Nifty 100	25,613.30	0.47%	2.10%	-0.04%
Nifty 200	13,930.00	0.56%	2.15%	-0.45%
Nifty 500	23,066.60	0.59%	2.21%	-0.90%
Nifty Large Midcap 250	16,208.75	0.71%	2.32%	-0.92%
Nifty Midcap 150	21,466.85	0.94%	2.54%	-1.79%
Nifty Next 50	67,907.45	0.75%	2.54%	-0.47%
Nifty Smallcap 250	17,006.45	0.76%	2.32%	-5.04%

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

Smart Beta Index

Index	19-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,685.25	0.07%	3.03%	-0.02%
NIFTY 500 Value 50	14,079.65	1.04%	1.88%	-1.61%
Nifty 200 Quality 30	20,520.85	0.60%	2.13%	-1.26%
Nifty 50 Equal Weight	31,716.20	0.43%	2.76%	0.86%
NIFTY Alpha Low Volatility 30	26,527.80	0.18%	2.29%	-0.30%
Nifty High Beta 50	3,637.35	1.24%	2.29%	-4.82%
Nifty Low Volatility 50	25,081.40	0.49%	2.78%	0.26%
Nifty Midcap150 Momentum 50	61,631.50	0.76%	2.61%	-0.47%
Nifty PSE	9,562.90	0.16%	-0.19%	-4.01%
Nifty SME Emerge	15,137.09	0.54%	1.52%	-0.63%
Nifty 100 ESG	4,947.00	0.58%	2.47%	0.67%

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

Sector Indices

Index	19-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	25,456.70	1.31%	6.71%	6.54%
Nifty Bank	55,865.15	0.23%	1.49%	-0.74%
Nifty Consumption	12,189.70	0.83%	3.77%	4.19%
Nifty Financial	26,592.30	-0.06%	1.75%	0.14%
Nifty FMCG	55,886.65	1.05%	1.55%	-1.10%
Nifty Healthcare	14,625.50	-0.05%	1.67%	-0.29%
Nifty IT	34,756.70	0.35%	0.24%	-6.42%
Nifty Media	1,671.50	1.34%	1.45%	-5.62%
Nifty Metal	9,457.50	0.75%	2.47%	-0.01%
Nifty MNC	29,457.75	1.32%	4.24%	1.10%
Nifty Pharma	22,066.75	-0.34%	1.44%	-2.33%
Nifty Realty	904.30	0.65%	2.31%	-9.56%
Nifty Energy	34,768.10	0.83%	0.08%	-4.04%

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

Nifty 50 Top 5 Gainers

Company	19-Aug-25	Prev_Day	% Change	1 Week
Tata Motors	700.25	676.00	3.59	7.06
Adani Ports & SEZ	1,369.40	1,327.20	3.18	2.92
RIL	1,420.10	1,381.70	2.78	2.88
Hero Moto	5,118.20	4,984.00	2.69	10.18
Bajaj Auto	8,795.50	8,588.50	2.41	7.31

Source: NSE

Nifty 50 Top 5 Losers

Company	19-Aug-25	Prev_Day	% Change	1 Week
Shree Cements Limited	30,905.00	31340	-1.39	1.63
Divi's Lab	6,079.50	6165	-1.38	1.99
Hindalco	706.70	714	-1.04	5.94
Cipla	1,548.90	1565	-1.04	1.79
M&M	3,354.00	3383	-0.86	3.63

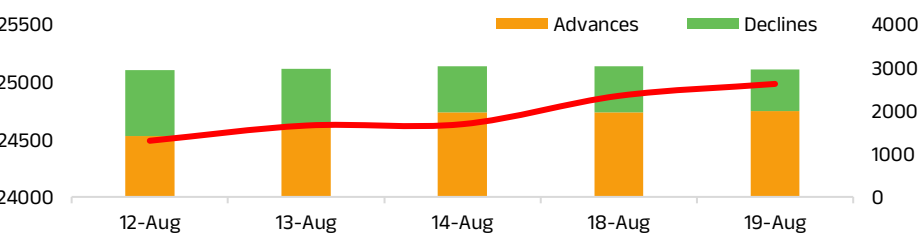
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

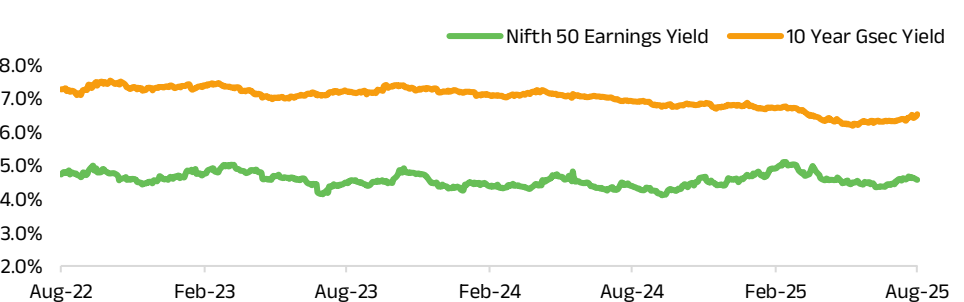
Indian equity markets continued their upward momentum from the previous session, driven by expectations that the Prime Minister's recent GST reforms could stimulate household consumption, ease inflationary pressures, and open the door for further rate cuts by the RBI. Market sentiment was further boosted by diplomatic initiatives aimed at resolving the conflict in Ukraine and enhancing India-China relations in the face of global uncertainty.

HealthTech startup and India's fastest-growing online medical services company Meradoc has entered into a strategic partnership with travel booking MakeMyTrip to offer a bouquet of healthcare services on the go for the latter's subscribers across the country.

Hindustan Zinc plans to expand into uranium mining if the government opens the sector to private players. According to a report, government sources stated last week that India is considering allowing private firms to mine, import, and process uranium as part of efforts to end a decades-old state monopoly over the nuclear sector and attract billions of dollars in investment.

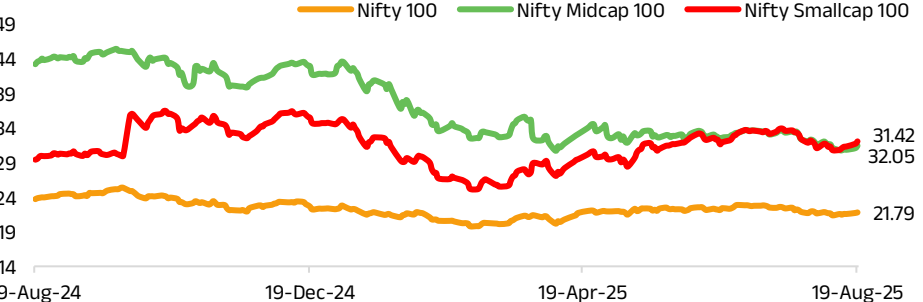
Reliance Infrastructure has received a Letter of Award (LoA) from NHPC for a 390-megawatt (MW) solar power project and a 780 megawatt-hour (MWh) battery energy storage system (BESS).

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



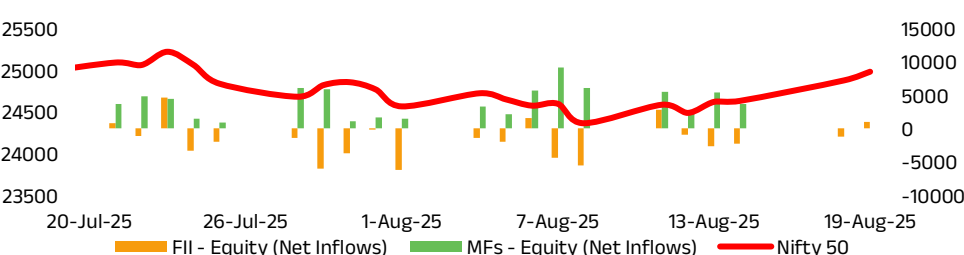
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1015.64	-21,168	-38,908	-116,808
MF**	3723.54	45,049	92,068	323,136
DII	2261.06	62,160	123,099	471,575

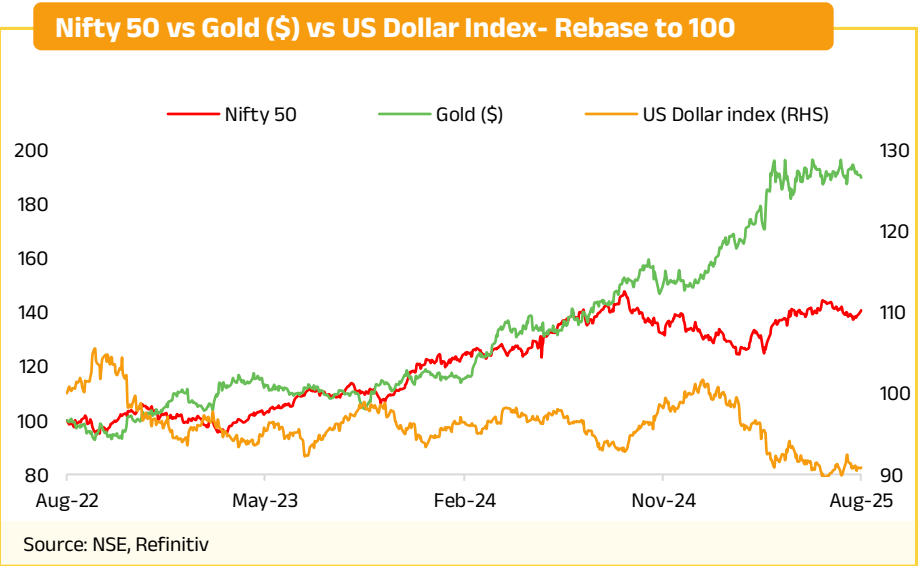
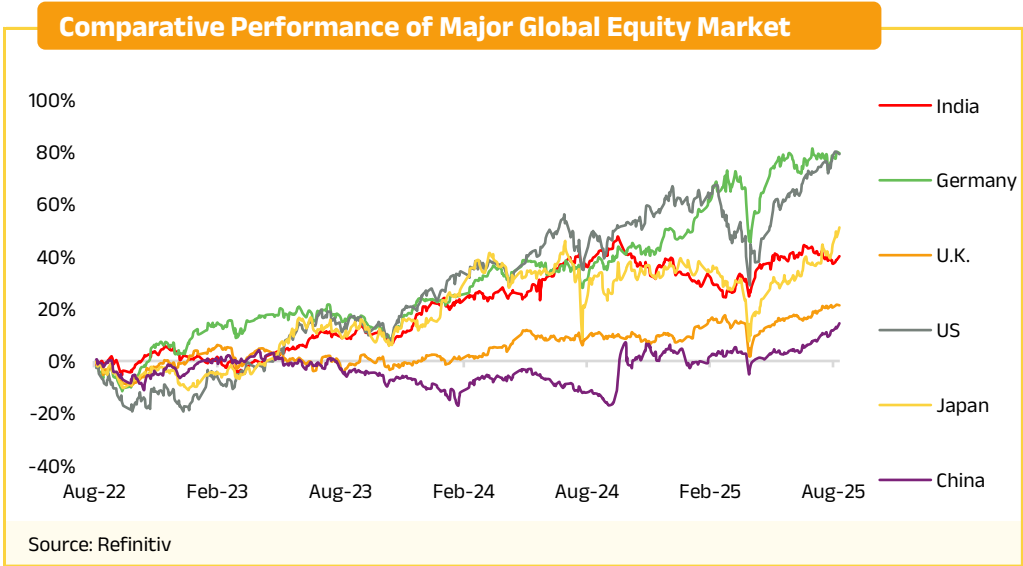
Source: SEBI, NSDL;**As on 14th Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25033.50	24966.80	0.27%
Near Basis	52.85	89.85	-41.18%
Mid Futures	25174.60	25104.00	0.28%
Mid Basis	193.95	227.05	-14.58%
Near Open Interest (Cr.)	1.62	1.64	-1.25%
Mid Open Interest (Cr.)	0.15	0.14	7.21%
Rollover (%)	10.34	9.53	8.48%
Put Call Ratio (OI)	1.14	1.00	14.47%
Put Call Ratio(Vol)	0.82	0.92	-11.09%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	4869	2673	40056
Index Options	1050570	1054431	338634
Stock Futures	26628	22551	388381
Stock Options	28377	28422	26247
Total	1110444	1108078	793317
Source: NSE			

Global Equity Market				
Global Indices	19-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3504.97	-0.61%	-0.54%	1.65%
Nasdaq 100 (U.S.)	23384.77	-1.39%	-1.91%	1.38%
FTSE (U.K.)	9189.22	0.34%	0.45%	2.19%
DAX Index (Germany)	24423.07	0.45%	1.66%	0.55%
CAC 40 Index (France)	7979.08	1.21%	2.91%	2.00%
SSE Composite (China)	3727.29	-0.02%	1.67%	5.45%
Nikkei (Japan)	43546.29	-0.38%	1.94%	9.36%
Kospi (South Korea)	3151.56	-0.81%	-1.20%	-1.15%
HangSeng (Hong Kong)	25122.90	-0.21%	0.61%	1.20%
Strait Times (Singapore)	4216.19	0.69%	-0.11%	0.64%
Ibovespa Sao Paulo (Brazil)	134432.26	-2.10%	-2.52%	0.79%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8896.20	-0.70%	0.17%	1.59%
Jakarta Composite (Indonesia)	7862.95	-0.45%	0.91%	7.54%
KLSE (Malaysia)	1590.24	0.33%	1.42%	4.22%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	19-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,702	-0.50%	-0.67%	0.92%
Gold (\$/oz)	3,315.19	-0.45%	-0.89%	-1.02%
Silver (INR/1 kg)	113,424	-0.50%	0.20%	0.72%
Silver (\$/oz)	37.37	-1.68%	-1.37%	-2.10%
Brent Crude(\$/bbl)	68.20	-0.96%	-0.04%	-5.13%
Crude Oil (INR/1 bbl)	5,544.00	-0.93%	-0.07%	-4.46%
NYMEX Crude(\$/bbl)	63.28	-1.75%	-1.31%	-7.53%
Natural Gas (INR/1 mmbtu)	252.60	1.65%	-3.73%	-16.99%
Aluminium (INR/1 kg)	250.65	-1.12%	-1.51%	0.52%
Copper (INR/1 kg)	882.40	-0.25%	-0.79%	-0.85%
Nickel (INR/1 kg)	1,329.60	-0.22%	-1.45%	0.86%
Lead (INR/1 kg)	186.40	0.92%	-0.88%	1.66%
Zinc (INR/1 kg)	268.75	-0.19%	-1.38%	0.56%
Mentha Oil (INR/1 kg)	1,012.50	-0.65%	-3.22%	8.91%
Baltic Dry Index	1,964	-2.87%	-2.63%	-4.29%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Earnings Visibility

Definition: Earnings visibility refers to the predictability and consistency of a **company's** future earnings, based on stable revenue streams, cost structures, and industry dynamics.



Explanation

Companies with high earnings visibility are favored by long-term investors and fund managers, especially during volatile market phases. These firms typically operate in sectors with recurring demand (e.g., FMCG, utilities, healthcare) and have strong pricing power, efficient operations, and low cyclicality. High visibility supports valuation premiums and reduces downside risk. Conversely, firms with low visibility—such as those in commodities or discretionary sectors—face earnings uncertainty due to external shocks. Analysts assess visibility through forward guidance, historical earnings stability, and macro linkages. **It's** a critical factor in portfolio construction and sector rotation strategies.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.12	10.22	1.08	14.38
Flexi Cap Fund	-0.35	11.59	0.45	16.21
Mid Cap Fund	-0.63	15.93	1.27	21.24
Large & Mid Cap Fund	-0.51	13.17	1.23	18.26
Small Cap Fund	-3.03	15.88	-1.62	21.19
Multi Cap Fund	-0.97	13.55	1.09	19.49
Focused Fund	-0.36	11.08	0.84	15.79
Value Fund	-1.66	9.99	-2.13	19.43
Contra Fund	-0.87	10.77	0.04	20.59
ELSS	-0.93	12.24	0.46	17.06
Equity Savings	0.27	5.88	5.27	9.75
Arbitrage Fund	0.42	3.01	6.48	6.73
Dividend Yield Fund	-1.30	9.00	-3.94	18.85
Aggressive Hybrid Fund	-0.32	9.95	2.52	14.39
Balanced Advantage	-0.31	7.54	2.48	11.61
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.				