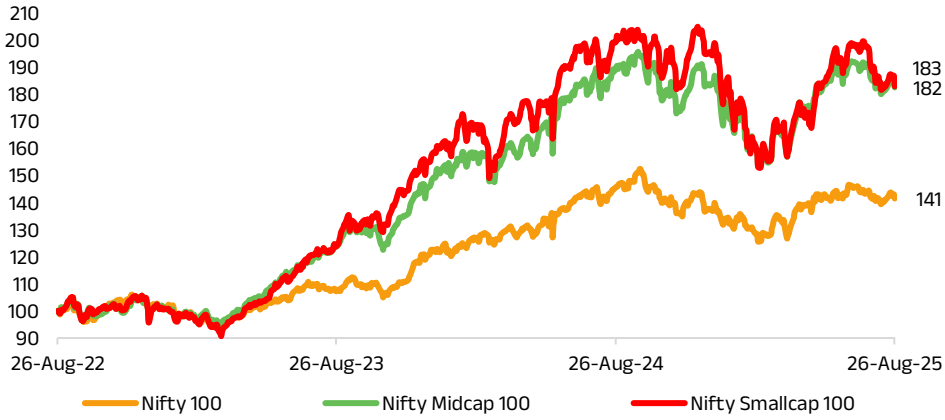


Broad Indices Historical Movement



Source: NSE

Broad Indices

	26-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,712.05	-1.02%	-1.35%	-0.50%
Nifty 100	25,313.50	-1.08%	-1.46%	-0.51%
Nifty 200	13,757.80	-1.17%	-1.56%	-0.79%
Nifty 500	22,768.65	-1.23%	-1.62%	-1.07%
Nifty Large Midcap 250	15,982.70	-1.27%	-1.77%	-1.14%
Nifty Midcap 150	21,119.30	-1.46%	-2.07%	-1.78%
Nifty Next 50	66,800.35	-1.35%	-2.00%	-0.52%
Nifty Smallcap 250	16,743.95	-1.86%	-1.88%	-3.66%

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

Smart Beta Index

Index	26-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,121.15	-1.60%	-1.87%	-1.56%
NIFTY 500 Value 50	13,725.70	-1.53%	-2.36%	-2.63%
Nifty 200 Quality 30	20,544.45	-0.42%	-0.97%	1.84%
Nifty 50 Equal Weight	31,345.00	-1.00%	-1.48%	0.70%
NIFTY Alpha Low Volatility 30	26,362.50	-0.87%	-0.92%	-0.39%
Nifty High Beta 50	3,524.60	-2.24%	-3.04%	-5.23%
Nifty Low Volatility 50	24,972.80	-0.72%	-1.16%	1.13%
Nifty Midcap150 Momentum 50	60,574.80	-1.53%	-2.28%	-1.41%
Nifty PSE	9,308.35	-1.67%	-2.71%	-4.92%
Nifty SME Emerge	15,106.94	-0.59%	-0.95%	0.42%
Nifty 100 ESG	4,909.35	-1.07%	-1.38%	0.19%

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

Sector Indices

Index	26-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	25,320.30	-0.41%	-0.58%	6.47%
Nifty Bank	54,450.45	-1.25%	-2.24%	-3.68%
Nifty Consumption	12,166.35	-0.38%	-1.05%	4.09%
Nifty Financial	25,952.60	-1.35%	-2.02%	-3.19%
Nifty FMCG	56,187.00	0.91%	-0.84%	2.94%
Nifty Healthcare	14,509.00	-1.66%	-0.54%	-2.27%
Nifty IT	36,063.20	-0.60%	1.05%	1.23%
Nifty Media	1,614.05	-0.75%	-1.49%	-3.33%
Nifty Metal	9,280.05	-1.66%	-2.29%	-1.54%
Nifty MNC	29,518.20	0.34%	-0.56%	3.35%
Nifty Pharma	21,990.00	-1.67%	0.09%	-2.97%
Nifty Realty	895.95	-2.24%	-1.96%	-5.75%
Nifty Energy	33,955.95	-1.56%	-2.56%	-3.67%

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

Nifty 50 Top 5 Gainers

Company	26-Aug-25	Prev_Day	% Change	1 Week
Britannia Industries Limited	5,765.50	5,550.50	3.87	1.13
Eicher Motors Limited	6,151.00	5,990.50	2.68	3.60
HUL	2,692.60	2,631.60	2.32	0.85
Maruti	14,714.00	14,452.00	1.81	3.47
ITC	403.35	399.35	1.00	-0.66

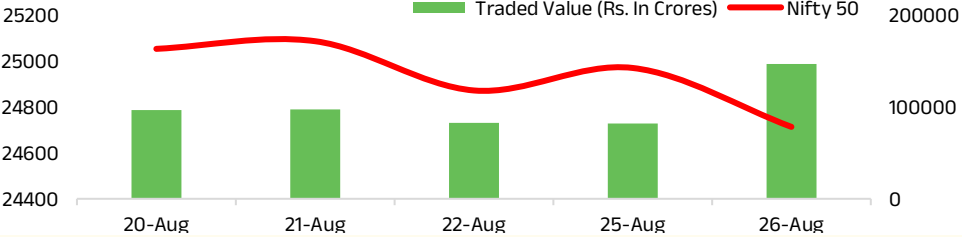
Source: NSE

Nifty 50 Top 5 Losers

Company	26-Aug-25	Prev_Day	% Change	1 Week
HDFC Bank	973.40	1964	-50.44	-51.04
Sun Pharma	1,600.30	1657	-3.40	-2.01
M&M	3,330.80	3399	-2.00	-1.91
Coal India	372.45	380	-1.99	-3.18
RIL	1,384.90	1413	-1.96	-1.99

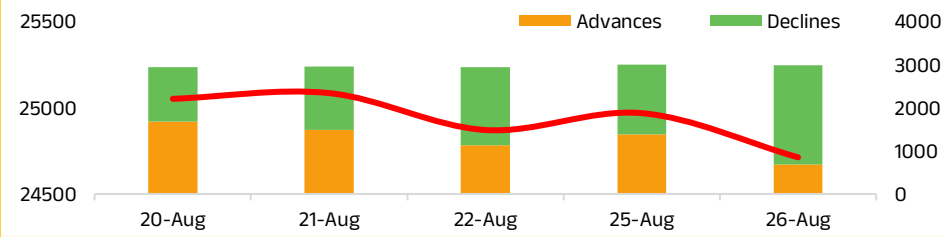
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

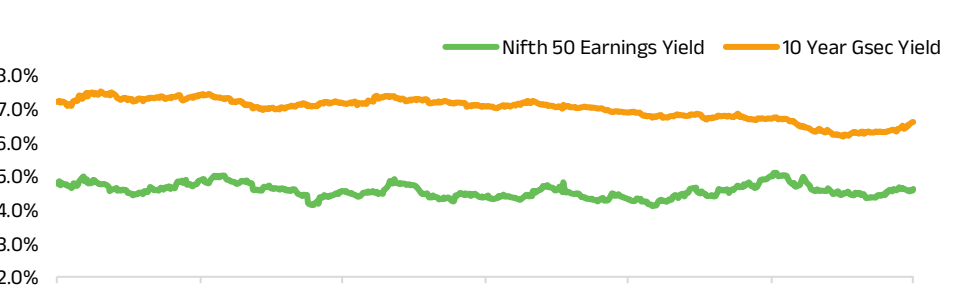
Indian equity markets witnessed a sharp selloff as investor sentiment turned cautious ahead of the U.S. penalty tariff deadline on Aug 27, 2025. Losses deepened after the U.S. administration issued a draft notice to impose up to 50% tariffs on Indian exports to the U.S. According to the U.S. Department of Homeland Security's draft order, an additional 25% tariff will be imposed on Indian goods entered for consumption or withdrawn from warehouse for consumption.

Jet Airways, currently in the process of liquidation, announced that it has finalized an agreement to transfer the lease of its office space in Mumbai to another entity for slightly more than Rs. 370 crore.

Jakson Engineers announced an investment of over Rs. 8,000 cr to establish a 6 GW integrated solar manufacturing facility in Madhya Pradesh. This will be the state's largest solar manufacturing project, developed in two phases on a 110-acre site.

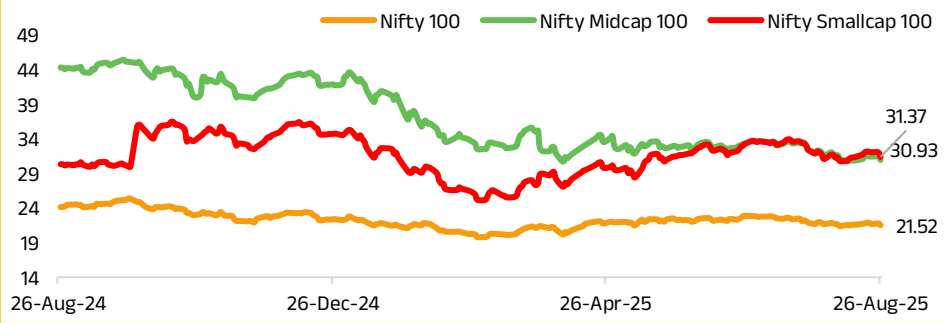
NRB Bearings has acquired an 8.5% equity stake in Amplus Ampere Private Limited for Rs. 4.80 cr to secure solar power as a captive consumer. Amplus Ampere, an SPV of Amplus Energy Solutions PTE LTD, focuses on solar power generation and distribution in India.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



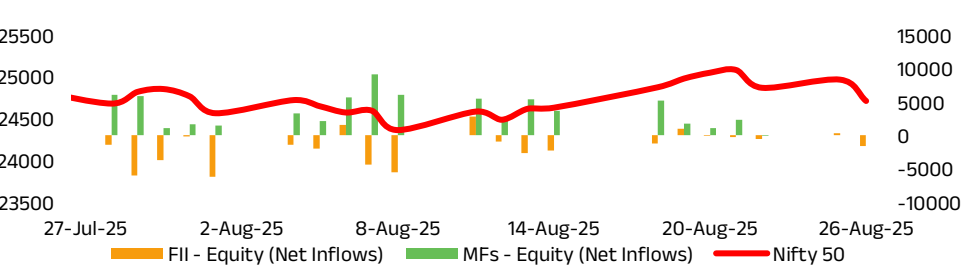
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	YTD
FII*	-1555.13	-23,255	-40,996	-118,896
MF**	-84.07	55,376	102,394	333,462
DII*	7060.37	76,421	137,360	485,835

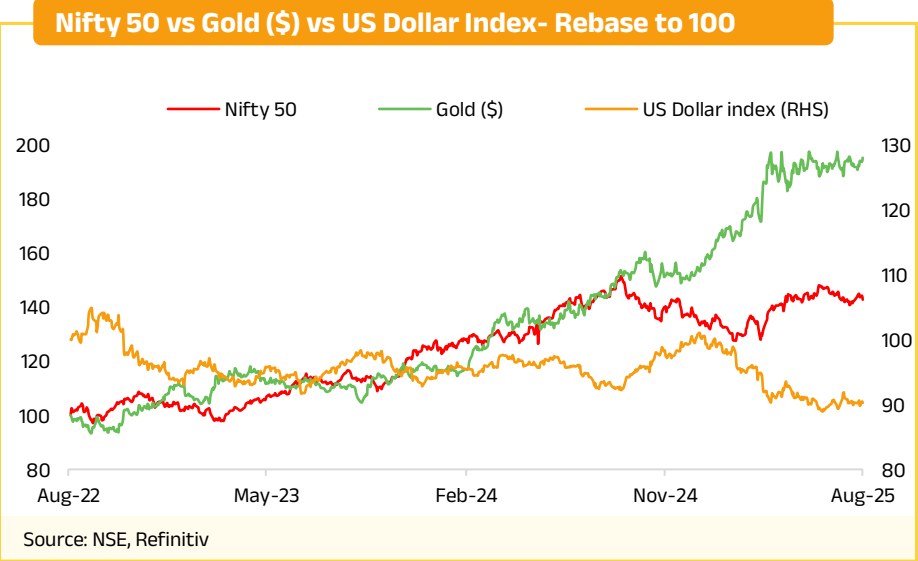
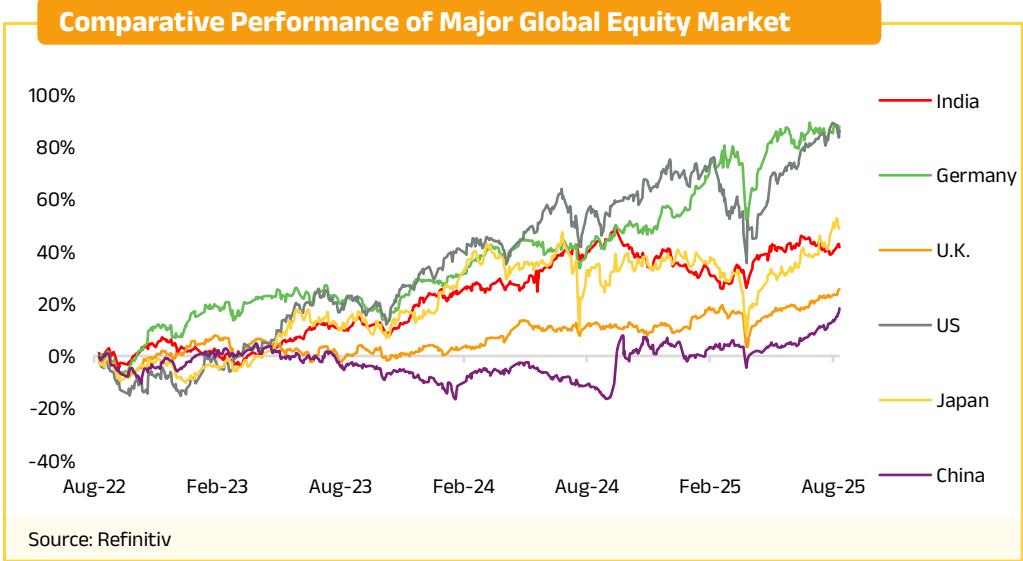
Source: SEBI, NSDL; *As on 26th Aug 2025; **As on 22nd Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24731.50	24731.50	0.00%
Near Basis	19.45	19.45	0.00%
Mid Futures	24857.50	24857.50	0.00%
Mid Basis	145.45	145.45	0.00%
Near Open Interest (Cr.)	0.69	0.69	0.00%
Mid Open Interest (Cr.)	1.14	1.14	0.00%
Rollover (%)	63.51	63.51	0.00%
Put Call Ratio (OI)	0.72	0.88	-18.01%
Put Call Ratio(Vol)	0.99	0.87	13.60%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	12681	12476	43814
Index Options	1094328	1103261	378253
Stock Futures	158041	157144	397650
Stock Options	30205	29667	28169
Total	1295256	1302547	847885
Source: NSE			

Global Equity Market				
Global Indices	27-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3547.40	0.26%	1.46%	1.45%
Nasdaq 100 (U.S.)	23565.85	0.17%	1.36%	1.26%
FTSE (U.K.)	9255.50	-0.11%	-0.35%	1.48%
DAX Index (Germany)	24046.21	-0.44%	-0.95%	-0.71%
CAC 40 Index (France)	7743.93	0.44%	-2.87%	-1.16%
SSE Composite (China)	3800.35	-1.76%	0.91%	5.75%
Nikkei (Japan)	42520.27	0.30%	-0.86%	2.57%
Kospi (South Korea)	3187.16	0.25%	1.82%	-0.28%
HangSeng (Hong Kong)	25201.76	-1.27%	0.14%	-0.73%
Strait Times (Singapore)	4245.57	0.04%	0.62%	-0.36%
Ibovespa Sao Paulo (Brazil)	139205.81	1.04%	3.37%	4.26%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8960.50	0.28%	0.48%	3.39%
Jakarta Composite (Indonesia)	7936.18	0.38%	-0.10%	5.21%
KLSE (Malaysia)	1587.91	0.40%	-0.02%	3.53%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	27-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm) ^[1]	100,351	0.31%	2.02%	2.35%
Gold (\$/oz)	3,396.89	0.13%	1.50%	1.83%
Silver (INR/1 kg) ^[1]	115,723	-0.31%	4.45%	1.22%
Silver (\$/oz)	38.61	0.06%	1.91%	1.24%
Brent Crude(\$/bbl)	68.39	-1.27%	-0.60%	-3.92%
Crude Oil (INR/1 bbl) ^[1]	5,665.00	1.78%	4.23%	-0.61%
NYMEX Crude(\$/bbl)	64.34	1.40%	0.39%	-2.93%
Natural Gas (INR/1 mmbtu)	235.70	-0.08%	-2.24%	-11.76%
Aluminium (INR/1 kg) ^[1]	252.75	-0.16%	0.82%	-1.13%
Copper (INR/1 kg) ^[1]	894.20	1.15%	2.39%	-0.42%
Nickel (INR/1 kg) ^[1]	1,337.30	0.80%	1.44%	-1.05%
Lead (INR/1 kg) ^[1]	181.65	-0.47%	-0.74%	-2.89%
Zinc (INR/1 kg) ^[1]	271.00	0.48%	0.56%	-1.00%
Mentha Oil (INR/1 kg) ^[1]	1,018.10	0.64%	0.43%	8.22%
Baltic Dry Index	2,046	0.24%	6.18%	-9.35%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Market Breadth

Definition: Market Breadth refers to the number of stocks advancing versus declining in a given market or index. It is a measure of overall market sentiment and participation.



Explanation

Market breadth provides insight into the strength or weakness of a market move. A rally with strong breadth—where most stocks are rising—suggests broad-based optimism. Conversely, a rally with weak breadth may indicate that gains are concentrated in a few large-cap stocks, raising concerns about sustainability. Breadth indicators include advance-decline ratios, new highs vs. new lows, and volume-based metrics. Analysts use these to confirm trends, spot divergences, and anticipate reversals. It’s especially useful in evaluating whether sectoral or index-level movements reflect genuine investor conviction or are driven by narrow leadership

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.30	11.32	-1.90	14.33
Flexi Cap Fund	-0.51	12.88	-2.61	16.01
Mid Cap Fund	-0.42	17.27	-2.08	20.52
Large & Mid Cap Fund	-0.86	14.25	-2.06	17.90
Small Cap Fund	-2.23	17.36	-5.21	20.08
Multi Cap Fund	-0.75	14.75	-2.23	18.92
Focused Fund	-0.67	12.20	-2.40	15.64
Value Fund	-1.50	11.09	-5.31	19.02
Contra Fund	-0.75	12.29	-3.00	20.35
ELSS	-1.06	13.35	-2.84	16.67
Equity Savings	0.18	6.20	4.34	9.76
Arbitrage Fund	0.43	3.07	6.50	6.80
Dividend Yield Fund	-0.87	10.08	-6.49	18.66
Aggressive Hybrid Fund	-0.63	10.71	0.02	14.20
Balanced Advantage	-0.53	8.03	0.48	11.48
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.				

^[1]Data as on 26 Aug,