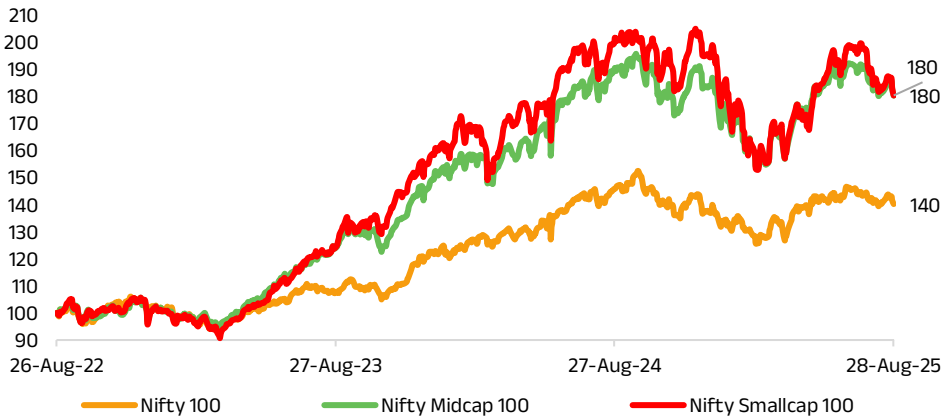


Broad Indices Historical Movement



Source: NSE

Broad Indices

	28-Aug-25	1 Day	1 Week	1 Month
Nifty 50	24,500.90	-0.85%	-2.32%	-0.73%
Nifty 100	25,078.50	-0.93%	-2.44%	-0.82%
Nifty 200	13,622.25	-0.99%	-2.51%	-1.11%
Nifty 500	22,541.65	-1.00%	-2.57%	-1.34%
Nifty Large Midcap 250	15,812.25	-1.07%	-2.64%	-1.47%
Nifty Midcap 150	20,864.75	-1.21%	-2.85%	-2.11%
Nifty Next 50	65,940.30	-1.29%	-2.99%	-1.24%
Nifty Smallcap 250	16,559.65	-1.10%	-3.03%	-3.52%

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

Smart Beta Index

Index	28-Aug-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,752.70	-1.22%	-3.07%	-1.86%
NIFTY 500 Value 50	13,603.60	-0.89%	-2.87%	-2.63%
Nifty 200 Quality 30	20,341.75	-0.99%	-1.62%	1.16%
Nifty 50 Equal Weight	31,133.45	-0.67%	-2.08%	0.67%
NIFTY Alpha Low Volatility 30	26,105.60	-0.97%	-2.18%	-0.73%
Nifty High Beta 50	3,468.10	-1.60%	-4.09%	-5.35%
Nifty Low Volatility 50	24,778.35	-0.78%	-1.89%	0.72%
Nifty Midcap150 Momentum 50	59,768.80	-1.33%	-3.16%	-1.90%
Nifty PSE	9,222.30	-0.92%	-3.15%	-5.06%
Nifty SME Emerge	15,076.73	-0.20%	-1.53%	0.24%
Nifty 100 ESG	4,859.15	-1.02%	-2.33%	-0.33%

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

Sector Indices

Index	28-Aug-25	1 Day	1 Week	1 Month
Nifty Auto	25,183.50	-0.54%	-0.76%	6.29%
Nifty Bank	53,820.35	-1.16%	-3.47%	-4.04%
Nifty Consumption	12,063.85	-0.84%	-1.59%	3.89%
Nifty Financial	25,640.30	-1.20%	-3.51%	-3.66%
Nifty FMCG	55,612.95	-1.02%	-1.23%	1.61%
Nifty Healthcare	14,375.60	-0.92%	-2.36%	-3.26%
Nifty IT	35,488.75	-1.59%	-0.66%	0.34%
Nifty Media	1,606.35	-0.48%	-1.96%	-1.12%
Nifty Metal	9,210.50	-0.75%	-2.98%	-1.14%
Nifty MNC	29,273.00	-0.83%	-1.12%	2.94%
Nifty Pharma	21,808.35	-0.83%	-1.67%	-4.19%
Nifty Realty	882.50	-1.50%	-3.80%	-3.22%
Nifty Energy	33,682.85	-0.80%	-2.88%	-3.82%

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

Nifty 50 Top 5 Gainers

Company	28-Aug-25	Prev_Day	% Change	1 Week
Titan Industries Limited	3,637.70	3,594.00	1.22	0.59
L&T Ltd.	3,560.10	3,541.30	0.53	-1.45
Coal India	374.30	372.45	0.50	-1.02
Hero Moto	5,091.70	5,073.40	0.36	-0.11
Asian Paints	2,489.00	2,481.40	0.31	-3.02

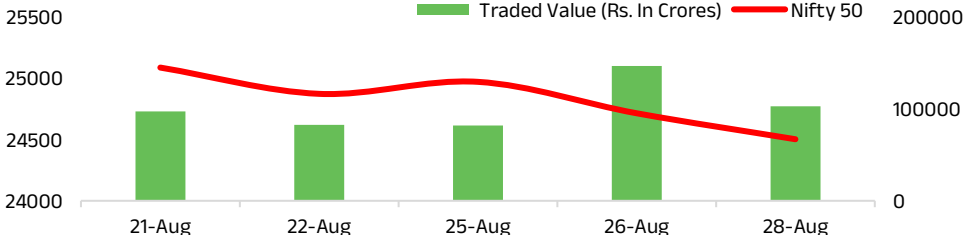
Source: NSE

Nifty 50 Top 5 Losers

Company	28-Aug-25	Prev_Day	% Change	1 Week
HCL Tech	1,449.80	1493	-2.88	-2.93
TCS	3,093.70	3157	-2.01	-0.29
Power Grid	274.45	280	-1.95	-3.36
Infosys	1,500.10	1530	-1.93	0.25
Tata Beverages	1,062.40	1080	-1.62	-2.36

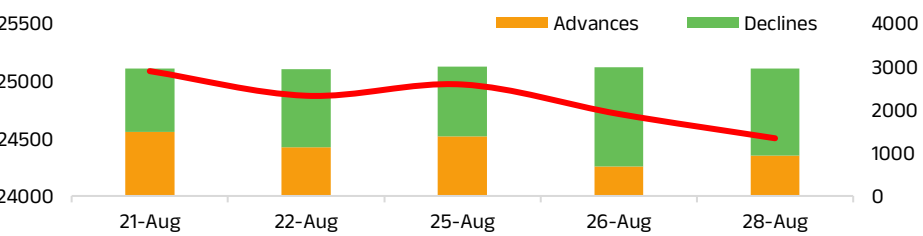
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

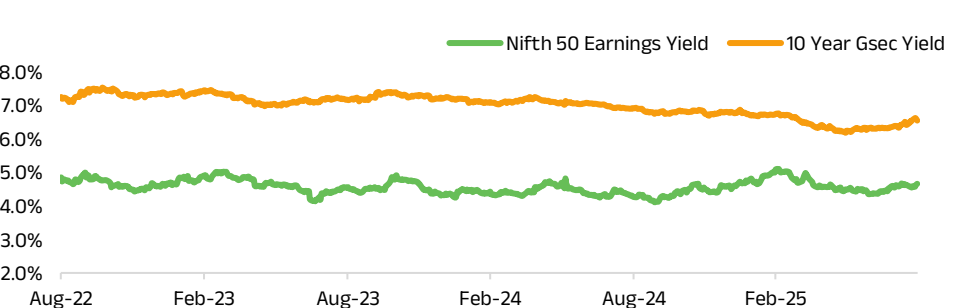
 Indian equity markets declined after the additional 25% tariff imposed by the U.S. President on India came into effect on Aug 27, 2025. This levy, targeting purchases of Russian oil, is in addition to the existing 25% duties on Indian exports to the U.S., effectively raising the total tariff rate to 50%. The steep increase in tariffs dampened investor sentiment, triggering a sharp market sell-off.

 Hindalco Industries plans to establish a new integrated aluminium facility in Kuppam, Andhra Pradesh, with an investment of Rs. 586 crore. The plant will supply aluminium for the production of Apple's iPhone chassis.

 Power Mech Projects announced on Thursday that it has secured an order worth Rs. 370.84 crore from Mahan Energen, a subsidiary of Adani Power, for executing civil works at the Mahan Phase-III project in Singrauli, Madhya Pradesh.

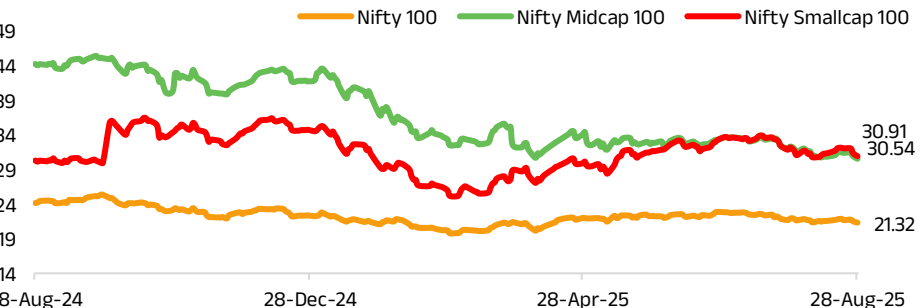
 India's largest beauty retailer and owner of the Nykaa platform, is expanding its overseas operations in a bid to compete with global cosmetics giants beyond its home market.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



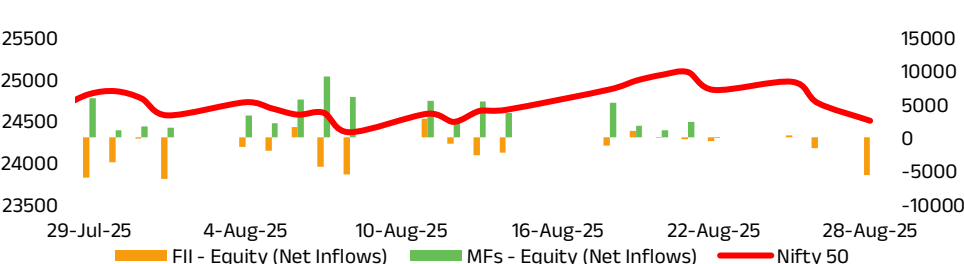
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-5650.28	-28,905	-46,646	-124,546
MF**	-84.07	55,376	102,394	333,462
DII	6920.34	83,341	144,280	492,755

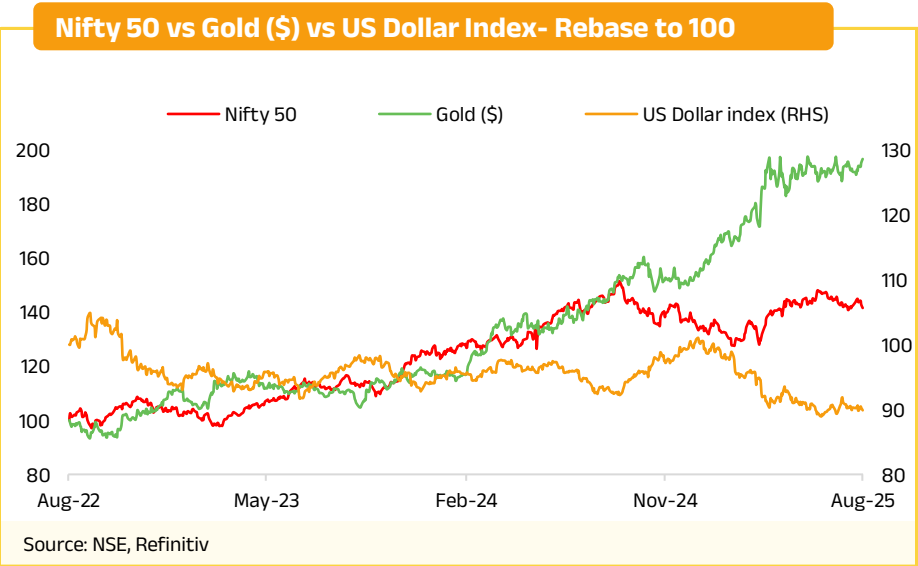
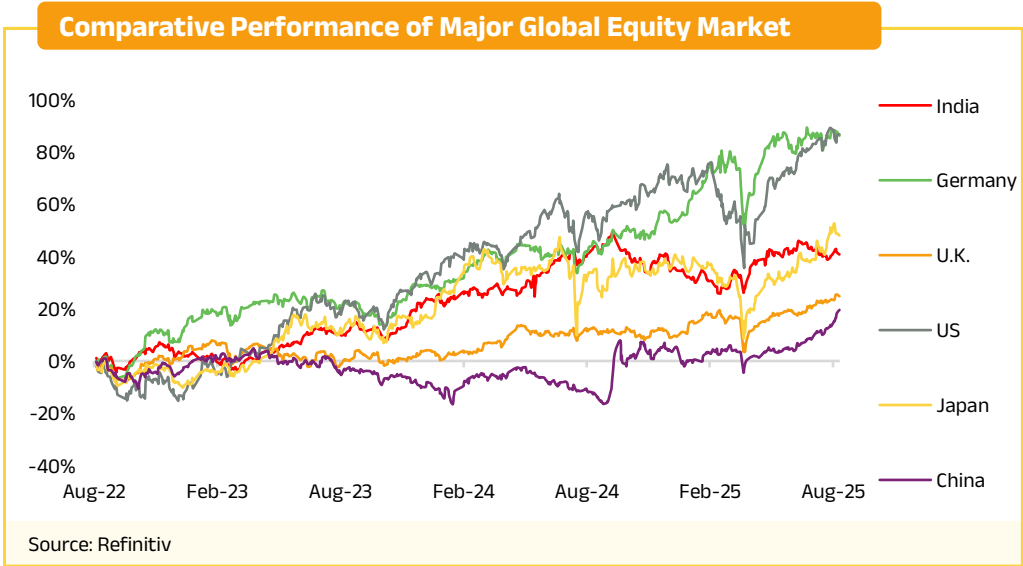
Source: SEBI, NSDL;\*\*As on 22nd Aug 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24496.30	24731.50	-0.95%
Near Basis	-4.60	19.45	-123.65%
Mid Futures	24651.70	24857.50	-0.83%
Mid Basis	150.80	145.45	3.68%
Near Open Interest (Cr.)	0.33	0.69	-52.16%
Mid Open Interest (Cr.)	1.60	1.14	40.49%
Rollover (%)	83.63	63.51	31.67%
Put Call Ratio (OI)	0.76	0.72	5.52%
Put Call Ratio(Vol)	0.95	0.99	-3.68%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	14955	16255	46110
Index Options	2333421	2337716	358835
Stock Futures	107142	107107	388949
Stock Options	22330	22378	25675
Total	2477847	2483455	819568
Source: NSE			

Global Equity Market				
Global Indices	28-Aug-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3560.21	0.36%	2.21%	1.81%
Nasdaq 100 (U.S.)	23703.45	0.58%	2.42%	1.49%
FTSE (U.K.)	9216.82	-0.42%	-0.99%	1.49%
DAX Index (Germany)	24039.92	-0.03%	-1.04%	0.29%
CAC 40 Index (France)	7762.60	0.24%	-2.21%	-0.49%
SSE Composite (China)	3843.60	1.14%	1.92%	6.83%
Nikkei (Japan)	42828.79	0.73%	0.51%	4.46%
Kospi (South Korea)	3196.32	0.29%	1.74%	-0.41%
HangSeng (Hong Kong)	24998.82	-0.81%	-0.42%	-2.20%
Strait Times (Singapore)	4253.78	0.19%	0.54%	0.30%
Ibovespa Sao Paulo (Brazil)	141049.20	1.32%	4.86%	6.75%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8980.00	0.22%	-0.43%	3.25%
Jakarta Composite (Indonesia)	7952.09	0.20%	0.78%	4.43%
KLSE (Malaysia)	1587.07	-0.05%	-0.36%	3.77%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	28-Aug-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	100,999	0.65%	2.12%	3.02%
Gold (\$/oz)	3,416.69	0.58%	2.34%	3.10%
Silver (INR/1 kg)	116,905	1.02%	3.71%	3.60%
Silver (\$/oz)	39.07	1.18%	2.37%	2.37%
Brent Crude(\$/bbl)	67.56	-1.21%	-1.82%	-5.75%
Crude Oil (INR/1 bbl)	5,629.00	-0.64%	3.06%	-0.16%
NYMEX Crude(\$/bbl)	64.81	0.73%	0.54%	-4.28%
Natural Gas (INR/1 mmbtu)	253.20	7.42%	5.63%	-5.91%
Aluminium (INR/1 kg)	254.15	0.55%	1.34%	-0.53%
Copper (INR/1 kg)	885.50	-0.97%	0.99%	-0.95%
Nickel (INR/1 kg)	1,337.80	0.04%	1.87%	0.02%
Lead (INR/1 kg)	183.65	1.10%	-0.03%	-1.00%
Zinc (INR/1 kg)	269.65	-0.50%	0.24%	0.33%
Mentha Oil (INR/1 kg)	1,015.50	-0.26%	0.41%	7.22%
Baltic Dry Index	2,017	-1.42%	6.55%	-9.39%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Free Cash Flow (FCF)

Definition: Free Cash Flow is the cash a company generates after accounting for capital expenditures needed to maintain or expand its asset base. It is calculated as operating cash flow minus capital expenditures.



Explanation

FCF is a critical measure of a company’s financial flexibility and long-term value creation. Unlike earnings, which can be influenced by accounting choices, FCF reflects actual cash available for dividends, debt repayment, or reinvestment. High and consistent FCF is often a hallmark of quality businesses with strong competitive advantages. Investors use FCF to assess sustainability of dividends, evaluate acquisition potential, and perform discounted cash flow (DCF) valuations. In equity analysis, FCF yield (FCF per share divided by stock price) is a useful metric for comparing companies across sectors.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.59	12.43	-2.92	13.94
Flexi Cap Fund	-0.74	14.10	-3.59	15.63
Mid Cap Fund	-0.68	18.39	-3.15	20.05
Large & Mid Cap Fund	-1.03	15.41	-3.05	17.50
Small Cap Fund	-2.18	18.47	-5.98	19.66
Multi Cap Fund	-0.95	15.84	-3.23	18.49
Focused Fund	-0.97	13.25	-3.52	15.24
Value Fund	-1.70	12.32	-6.14	18.63
Contra Fund	-0.96	13.51	-3.84	20.03
ELSS	-1.30	14.53	-3.89	16.27
Equity Savings	0.16	6.57	4.06	9.65
Arbitrage Fund	0.47	3.08	6.47	6.79
Dividend Yield Fund	-0.93	11.58	-7.18	18.36
Aggressive Hybrid Fund	-0.75	11.69	-0.70	13.93
Balanced Advantage	-0.68	8.60	-0.17	11.25
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.				