

Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 1-Jul-25 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|--------|--------|---------|
| Nifty 50 | 25,541.80 | 0.10% | 1.99% | 3.20% |
| Nifty 100 | 26,156.10 | 0.06% | 2.05% | 3.20% |
| Nifty 200 | 14,260.50 | 0.06% | 2.03% | 3.35% |
| Nifty 500 | 23,615.45 | -0.01% | 2.17% | 3.57% |
| Nifty Large Midcap 250 | 16,563.30 | -0.05% | 2.01% | 3.55% |
| Nifty Midcap 150 | 21,951.05 | -0.17% | 1.99% | 3.91% |
| Nifty Next 50 | 68,930.20 | -0.10% | 2.35% | 3.25% |
| Nifty Smallcap 250 | 17,762.00 | -0.20% | 3.39% | 5.52% |

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

Smart Beta Index

| Index | 1-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index | 31,912.00 | 0.03% | 1.17% | 4.61% |
| NIFTY 500 Value 50 | 14,380.15 | 0.10% | 2.97% | 4.01% |
| Nifty 200 Quality 30 | 20,962.70 | -0.30% | 1.20% | 2.10% |
| Nifty 50 Equal Weight | 32,062.90 | 0.03% | 1.94% | 3.74% |
| NIFTY Alpha Low Volatility 30 | 27,171.95 | -0.06% | 1.56% | 2.85% |
| Nifty High Beta 50 | 3,872.50 | 0.08% | 2.75% | 4.16% |
| Nifty Low Volatility 50 | 25,361.85 | -0.07% | 1.55% | 2.70% |
| Nifty Midcap150 Momentum 50 | 63,676.25 | -0.47% | 1.06% | 4.48% |
| Nifty PSE | 10,086.70 | -0.07% | 1.75% | 2.22% |
| Nifty SME Emerge | 14,812.74 | 0.20% | 1.44% | 3.49% |
| Nifty 100 ESG | 5,004.00 | -0.20% | 1.83% | 3.04% |

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

Sector Indices

| Index | 1-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 23,824.00 | -0.20% | 0.96% | 2.14% |
| Nifty Bank | 57,459.45 | 0.26% | 1.77% | 3.07% |
| Nifty Consumption | 11,830.95 | -0.10% | 1.84% | 3.93% |
| Nifty Financial | 27,124.20 | -0.18% | 1.40% | 2.36% |
| Nifty FMCG | 54,502.95 | -0.69% | 0.29% | -1.41% |
| Nifty Healthcare | 14,494.20 | 0.21% | 2.63% | 4.35% |
| Nifty IT | 38,833.15 | -0.30% | 1.08% | 4.05% |
| Nifty Media | 1,731.40 | -1.31% | 0.15% | 1.17% |
| Nifty Metal | 9,564.55 | 0.31% | 2.94% | 4.04% |
| Nifty MNC | 28,777.40 | -0.55% | 1.76% | 2.35% |
| Nifty Pharma | 22,041.25 | 0.01% | 1.70% | 2.79% |
| Nifty Realty | 984.20 | -0.24% | -2.96% | 3.67% |
| Nifty Energy | 36,480.10 | -0.24% | 2.11% | 1.68% |

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

Nifty 50 Top 5 Gainers

| Company | 1-Jul-25 | Prev_Day | % Change | 1 Week |
|------------------------------------|----------|----------|----------|--------|
| RIL | 1,528.40 | 1,500.60 | 1.85 | 5.35 |
| United Phos | 671.05 | 661.25 | 1.48 | 4.13 |
| SBI Life Insurance Company Limited | 1,862.50 | 1,838.30 | 1.32 | 1.06 |
| Asian Paints | 2,369.50 | 2,341.10 | 1.21 | 4.14 |
| Eicher Motors Limited | 5,715.50 | 5,656.50 | 1.04 | 1.54 |

Source: NSE

Nifty 50 Top 5 Losers

| Company | 1-Jul-25 | Prev_Day | % Change | 1 Week |
|------------------------------|----------|----------|----------|--------|
| Axis Bank | 1,173.30 | 1199 | -2.16 | -3.92 |
| Britannia Industries Limited | 5,743.50 | 5851 | -1.84 | 2.25 |
| ICICI Bank | 1,432.00 | 1446 | -0.95 | 0.55 |
| Tech Mahindra | 1,671.20 | 1687 | -0.94 | -0.35 |
| TCS | 3,429.70 | 3462 | -0.93 | 1.16 |

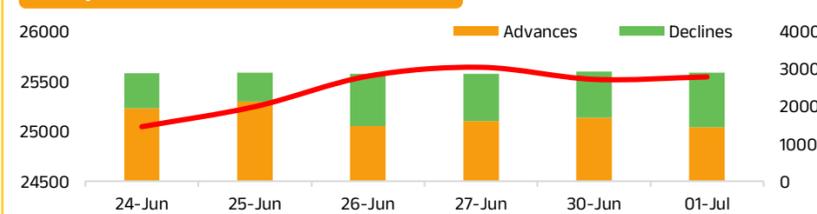
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

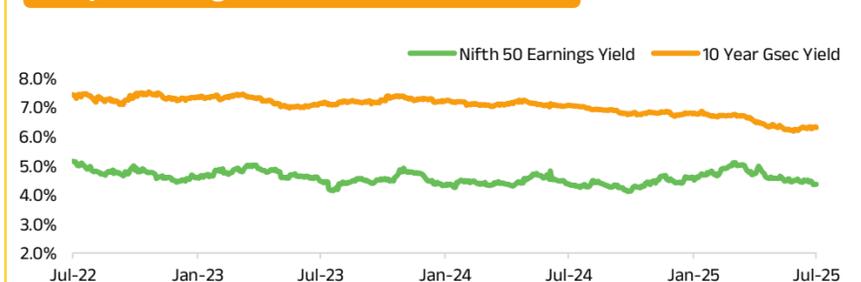
Indian equity markets ended flat with a modest upward bias, as investors remained cautious ahead of the U.S. reciprocal tariff deadline on Jul 8, 2025. Market attention was centered on ongoing trade talks between India and the U.S., with expectations of a possible agreement later this week.

BPTP Group plans to invest Rs. 3000 crores in the development of a premium housing project in Gurugram as a component of its expansion strategy. The company is working on a 12.05-acre project located in Sector 102 along the Dwarka Expressway, Gurugram, which will include approximately 1,600 apartments.

CleanMax has partnered with Toyota Tsusho India to create renewable energy projects with a total capacity of 300 megawatts in India. The company's objective of this new collaboration is to utilize the synergies between the two companies to develop and manage renewable energy projects for Japanese corporations operating in India.

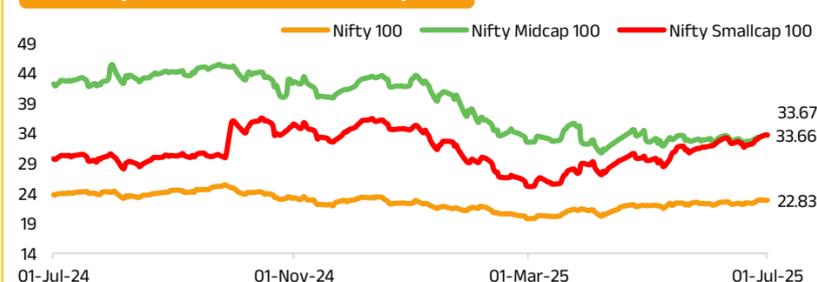
Prestige Estates Projects Ltd aims to achieve a revenue of Rs. 3,350 crore from its forthcoming housing development in Chennai. The firm has initiated a residential project named Prestige Pallavaram Gardens, located on the Pallavaram-Thoraipakkam Radial Road in Chennai.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



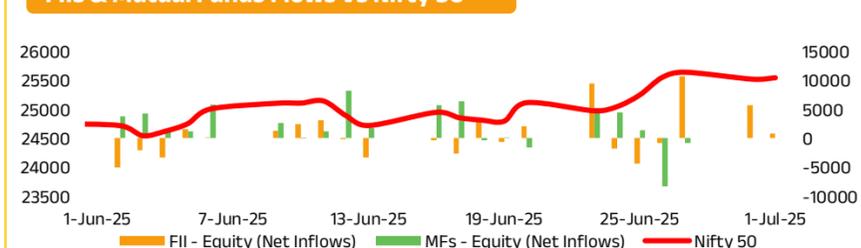
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

| Description | INR Cr. | | | |
|-------------|---------|-----|-----|---------|
| | Net | MTD | QTD | YTD |
| FII | 829.62 | 830 | 830 | -77,070 |
| MF** | -808.37 | | | 228,733 |
| DII | 771.08 | 771 | 771 | 349,246 |

Source: SEBI, NSDL;**As on 27th Jun 2025;

F&O Trends

| | Latest | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures | 25643.30 | 25614.20 | 0.11% |
| Near Basis | 101.50 | 97.15 | 4.48% |
| Mid Futures | 25756.90 | 25733.90 | 0.09% |
| Mid Basis | 215.10 | 216.85 | -0.81% |
| Near Open Interest (Cr.) | 1.45 | 1.44 | 0.91% |
| Mid Open Interest (Cr.) | 0.16 | 0.16 | 3.63% |
| Rollover (%) | 11.14 | 10.82 | 2.97% |
| Put Call Ratio (OI) | 0.88 | 0.81 | 8.64% |
| Put Call Ratio(Vol) | 0.92 | 0.95 | -3.94% |

Source: NSE

FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 3072 | 3973 | 27075 |
| Index Options | 1236448 | 1251666 | 351569 |
| Stock Futures | 14669 | 18160 | 389109 |
| Stock Options | 42186 | 41992 | 42607 |
| Total | 1296375 | 1315791 | 810360 |

Source: NSE

Global Equity Market

| Global Indices | 1-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.) | 3391.83 | -0.11% | 1.70% | 4.82% |
| Nasdaq 100 (U.S.) | 22478.13 | -0.89% | 1.30% | 5.33% |
| FTSE (U.K.) | 8785.33 | 0.28% | 0.30% | 0.15% |
| DAX Index (Germany) | 23673.29 | -0.99% | 0.13% | -1.35% |
| CAC 40 Index (France) | 7662.59 | -0.04% | 0.61% | -1.15% |
| SSE Composite (China) | 3457.75 | 0.39% | 1.09% | 3.29% |
| Nikkei (Japan) | 39986.33 | -1.24% | 3.08% | 5.32% |
| Kospi (South Korea) | 3089.65 | 0.58% | -0.45% | 14.53% |
| HangSeng (Hong Kong) ^[1] | 24072.28 | -0.87% | -0.43% | 3.36% |
| Strait Times (Singapore) | 3989.76 | 0.64% | 2.19% | 2.44% |
| Ibovespa Sao Paulo (Brazil) | 139549.43 | 0.50% | 1.74% | 1.84% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8541.10 | -0.01% | -0.17% | 1.26% |
| Jakarta Composite (Indonesia) | 6915.36 | -0.18% | 0.67% | -3.63% |
| KLSE (Malaysia) | 1541.53 | 0.56% | 1.80% | 2.20% |

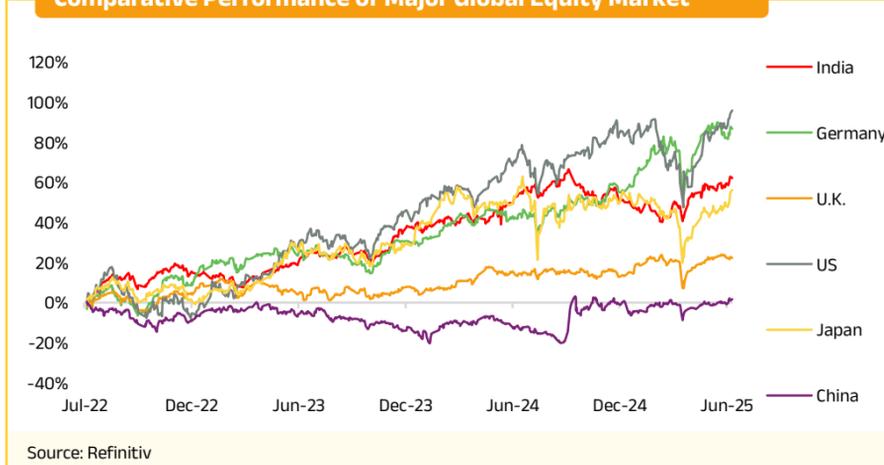
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

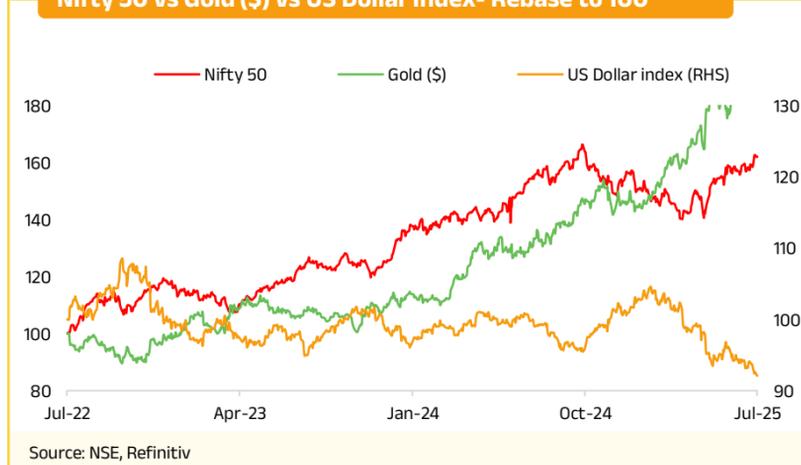
| Commodity Prices | 1-Jul-25 | 1 Day | 1 Week | 1 Month |
|---------------------------|----------|--------|---------|---------|
| Gold (INR/10 gm) | 96,900 | 1.28% | 0.12% | 1.94% |
| Gold (\$/oz) | 3,338.83 | 1.08% | 0.45% | 1.51% |
| Silver (INR/1 kg) | 106,624 | 0.86% | 0.59% | 9.64% |
| Silver (\$/oz) | 36.06 | -0.06% | 0.44% | 9.37% |
| Brent Crude(\$/bbl) | 69.25 | -2.66% | -4.42% | 6.34% |
| Crude Oil (INR/1 bbl) | 5,566.00 | -0.71% | -6.41% | 6.83% |
| NYMEX Crude(\$/bbl) | 66.54 | 0.51% | 1.82% | 8.62% |
| Natural Gas (INR/1 mmbtu) | 320.50 | 0.19% | -0.16% | 6.44% |
| Aluminium (INR/1 kg) | 248.75 | -0.26% | 0.00% | 4.74% |
| Copper (INR/1 kg) | 900.00 | 0.82% | 1.74% | 3.73% |
| Nickel (INR/1 kg) | 1,323.20 | 0.23% | 0.82% | -0.62% |
| Lead (INR/1 kg) | 182.50 | -2.14% | -1.27% | -0.90% |
| Zinc (INR/1 kg) | 260.05 | -1.18% | 0.68% | 1.58% |
| Mentha Oil (INR/1 kg) | 941.40 | 1.00% | 0.43% | -3.67% |
| Baltic Dry Index | 1,458 | -2.08% | -13.27% | 2.82% |

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

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index - Rebase to 100



Term of the Day



Secondary Market

Definition: The secondary market is the segment of the capital market where previously issued securities such as stocks and bonds are bought and sold among investors.



Explanation

Unlike the primary market, where companies raise capital, the secondary market facilitates trading between investors. Stock exchanges like NSE and BSE in India are key platforms for this. For example, if Investor A buys shares of Company X during its IPO, and later sells them to Investor B on the stock exchange, that transaction happens in the secondary market. It provides liquidity, price discovery, and a continuous platform for trading.

Mutual Fund Category Performance - Equity & Hybrid

| Category | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund | 3.36 | 4.86 | 4.57 | 19.62 |
| Mid Cap Fund | 4.53 | 1.23 | 4.31 | 27.15 |
| Large & Mid Cap Fund | 3.92 | 2.80 | 5.03 | 23.90 |
| Small Cap Fund | 4.23 | -2.14 | 2.78 | 26.56 |
| Multi Cap Fund | 3.69 | 1.52 | 4.81 | 24.88 |
| Focused Fund | 3.34 | 3.18 | 4.57 | 20.99 |
| Value Fund | 3.28 | 2.29 | 2.64 | 25.11 |
| Contra Fund | 3.48 | 2.65 | 4.61 | 26.06 |
| ELSS | 3.69 | 2.57 | 3.83 | 22.55 |
| Equity Savings | 1.27 | 3.55 | 6.80 | 11.35 |
| Arbitrage Fund | 0.56 | 3.27 | 6.77 | 6.66 |
| Dividend Yield Fund | 3.08 | 2.70 | 2.10 | 24.13 |
| Aggressive Hybrid Fund | 2.72 | 3.80 | 5.80 | 18.51 |
| Balanced Advantage | 2.06 | 3.55 | 5.32 | 14.59 |

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 30 Jun, 2025

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