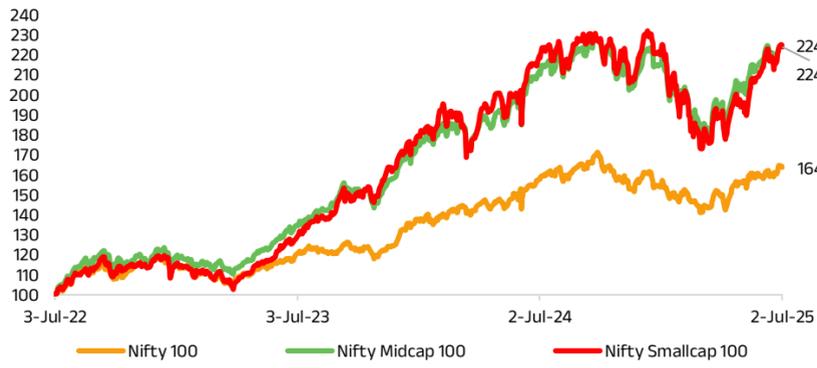


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 2-Jul-25 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|--------|--------|---------|
| Nifty 50 | 25,453.40 | -0.35% | 0.83% | 2.98% |
| Nifty 100 | 26,068.05 | -0.34% | 0.95% | 2.90% |
| Nifty 200 | 14,217.35 | -0.30% | 1.02% | 2.96% |
| Nifty 500 | 23,547.25 | -0.29% | 1.07% | 3.12% |
| Nifty Large Midcap 250 | 16,531.35 | -0.19% | 1.16% | 3.09% |
| Nifty Midcap 150 | 21,940.15 | -0.05% | 1.38% | 3.29% |
| Nifty Next 50 | 68,729.80 | -0.29% | 1.57% | 2.52% |
| Nifty Smallcap 250 | 17,693.10 | -0.39% | 1.36% | 4.36% |

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

Smart Beta Index

| Index | 2-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index | 31,722.70 | -0.59% | -0.03% | 3.97% |
| NIFTY 500 Value 50 | 14,333.80 | -0.32% | 2.21% | 3.35% |
| Nifty 200 Quality 30 | 20,953.10 | -0.05% | 0.68% | 2.01% |
| Nifty 50 Equal Weight | 32,008.60 | -0.17% | 1.08% | 3.66% |
| NIFTY Alpha Low Volatility 30 | 27,079.80 | -0.34% | 0.28% | 2.58% |
| Nifty High Beta 50 | 3,860.00 | -0.32% | 1.95% | 2.87% |
| Nifty Low Volatility 50 | 25,353.60 | -0.03% | 0.64% | 2.78% |
| Nifty Midcap150 Momentum 50 | 63,473.00 | -0.32% | 0.15% | 3.80% |
| Nifty PSE | 10,032.70 | -0.54% | 1.62% | 1.29% |
| Nifty SME Emerge | 14,758.66 | -0.37% | 0.70% | 3.59% |
| Nifty 100 ESG | 4,994.40 | -0.19% | 0.92% | 2.85% |

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

Sector Indices

| Index | 2-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 23,899.85 | 0.32% | 0.30% | 2.46% |
| Nifty Bank | 56,999.20 | -0.80% | 0.67% | 1.96% |
| Nifty Consumption | 11,845.95 | 0.13% | 0.74% | 3.50% |
| Nifty Financial | 26,861.70 | -0.97% | 0.04% | 1.56% |
| Nifty FMCG | 54,439.70 | -0.12% | -0.56% | -2.32% |
| Nifty Healthcare | 14,543.90 | 0.34% | 2.02% | 4.58% |
| Nifty IT | 38,879.10 | 0.12% | -0.43% | 4.90% |
| Nifty Media | 1,725.15 | -0.36% | -2.16% | 0.49% |
| Nifty Metal | 9,699.20 | 1.41% | 3.97% | 6.25% |
| Nifty MNC | 28,841.35 | 0.22% | 1.21% | 2.16% |
| Nifty Pharma | 22,110.80 | 0.32% | 1.40% | 3.35% |
| Nifty Realty | 970.05 | -1.44% | -4.87% | -0.12% |
| Nifty Energy | 36,331.25 | -0.41% | 1.43% | 1.11% |

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

Nifty 50 Top 5 Gainers

| Company | 2-Jul-25 | Prev_Day | % Change | 1 Week |
|-----------------------|-----------|-----------|----------|--------|
| JSW Steel | 1,059.90 | 1,029.60 | 2.94 | 3.46 |
| Asian Paints | 2,419.40 | 2,369.50 | 2.11 | 6.12 |
| Ultratech Cem | 12,436.00 | 12,210.00 | 1.85 | 5.99 |
| Shree Cements Limited | 31,640.00 | 31,185.00 | 1.46 | 8.82 |
| Maruti | 12,622.00 | 12,442.00 | 1.45 | -1.14 |

Source: NSE

Nifty 50 Top 5 Losers

| Company | 2-Jul-25 | Prev_Day | % Change | 1 Week |
|--------------------------------------|----------|----------|----------|--------|
| HDFC Standard Life Insurance Company | 789.70 | 810 | -2.49 | 0.59 |
| IndusInd Bank | 857.65 | 879 | -2.44 | 3.36 |
| L&T Ltd. | 3,596.80 | 3667 | -1.91 | -0.64 |
| HDFC Bank | 1,986.00 | 2012 | -1.30 | 0.29 |
| Cipla | 1,497.60 | 1516 | -1.19 | -0.82 |

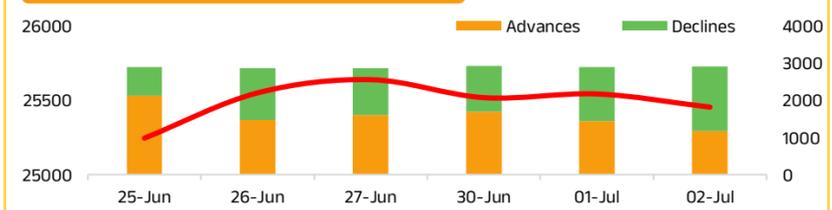
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

Indian equity markets declined amid ongoing uncertainty over the U.S.-India trade negotiations. Although the U.S. President hinted at an upcoming deal with reduced tariffs, investors are awaiting more details to assess its potential impact on the Indian economy and markets. Mixed global signals and the looming tariff deadline are fueling caution. Market focus is now shifting to Q1 FY26 earnings of domestic firms.

The Adani group has initiated the process of consolidating all its cement operations into a single entity as part of its "One Business, One Company" strategy. This move aims to establish a streamlined and efficient cement powerhouse that will encompass both the Ambuja and ACC brands, among others.

The investment firm 3G Capital, along with Singapore's sovereign wealth fund GIC, has requested authorization from the Competition Commission of India (CCI) to purchase the footwear and apparel company Skechers.

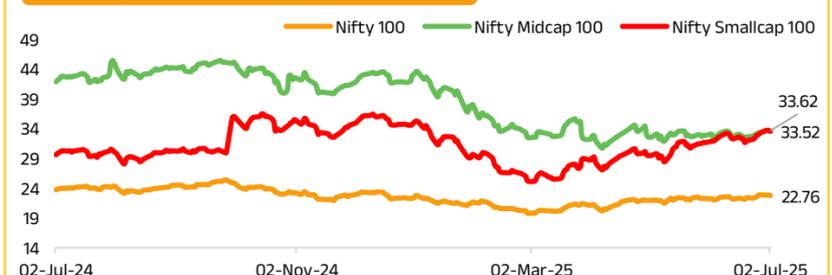
Adani Enterprises Limited (AEL) has successfully finalized the acquisition of an 85.1% stake in Air Works India (Engineering) Pvt. Ltd (AWIEPL) via its wholly owned subsidiary, Adani Defence Systems and Technologies Limited (ADSTL). The deal was valued at Rs. 400 crore for the 85.1% equity in AWIEPL.

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 | INR Cr. |
|-------------|---------|-------|-------|---------|
| | | | | YTD |
| FII | 1105.52 | 1,935 | 1,935 | -75,965 |
| MF** | 2252.7 | | | 230,986 |
| DII | 3036.68 | 3,808 | 3,808 | 352,283 |

Source: SEBI, NSDL;**As on 30th Jun 2025;

F&O Trends

| | Latest | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures | 25546.10 | 25643.30 | -0.38% |
| Near Basis | 92.70 | 101.50 | -8.67% |
| Mid Futures | 25650.80 | 25756.90 | -0.41% |
| Mid Basis | 197.40 | 215.10 | -8.23% |
| Near Open Interest (Cr.) | 1.41 | 1.45 | -3.17% |
| Mid Open Interest (Cr.) | 0.17 | 0.16 | 4.38% |
| Rollover (%) | 12.08 | 11.14 | 8.42% |
| Put Call Ratio (OI) | 0.78 | 0.88 | -11.37% |
| Put Call Ratio(Vol) | 1.05 | 0.92 | 14.93% |

Source: NSE

FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 2333 | 2446 | 28078 |
| Index Options | 1863758 | 1860360 | 318380 |
| Stock Futures | 16158 | 17493 | 390635 |
| Stock Options | 47402 | 48914 | 49437 |
| Total | 1929653 | 1929213 | 786530 |

Source: NSE

Global Equity Market

| Global Indices | 2-Jul-25 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.) | 3408.89 | 0.50% | 2.29% | 4.95% |
| Nasdaq 100 (U.S.) | 22641.89 | 0.73% | 1.82% | 5.35% |
| FTSE (U.K.) | 8774.69 | -0.12% | 0.64% | 0.00% |
| DAX Index (Germany) | 23790.11 | 0.49% | 1.24% | -0.59% |
| CAC 40 Index (France) | 7738.42 | 0.99% | 2.38% | 0.02% |
| SSE Composite (China) | 3454.79 | -0.09% | -0.03% | 3.21% |
| Nikkei (Japan) | 39762.48 | -0.56% | 2.11% | 6.12% |
| Kospi (South Korea) | 3075.06 | -0.47% | -1.07% | 13.93% |
| HangSeng (Hong Kong) | 24221.41 | 0.62% | -1.03% | 4.59% |
| Strait Times (Singapore) | 4010.77 | 0.53% | 2.16% | 3.09% |
| Ibovespa Sao Paulo (Brazil) | 139050.93 | -0.36% | 2.42% | 1.66% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8597.70 | 0.66% | 0.45% | 2.18% |
| Jakarta Composite (Indonesia) | 6881.24 | -0.49% | 0.72% | -2.60% |
| KLSE (Malaysia) | 1550.21 | 0.56% | 2.00% | 2.78% |

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

Global & Domestic Commodity Market

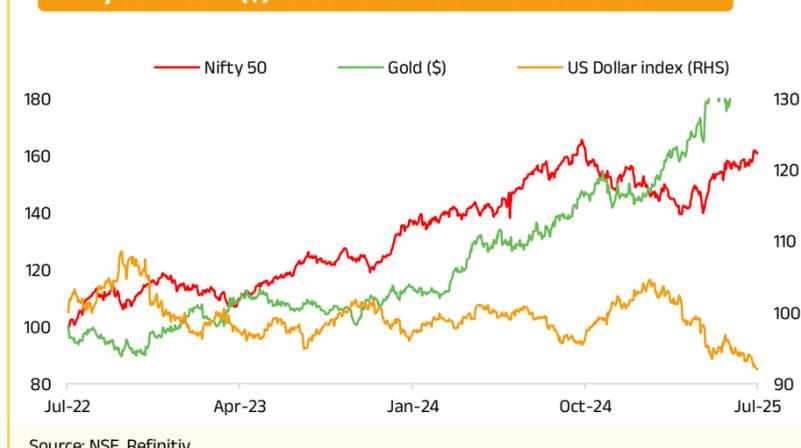
| Commodity Prices | 2-Jul-25 | 1 Day | 1 Week | 1 Month |
|---------------------------|----------|--------|---------|---------|
| Gold (INR/10 gm) | 97,057 | 0.16% | 0.25% | 0.94% |
| Gold (\$/oz) | 3,357.08 | 0.55% | 0.75% | -0.65% |
| Silver (INR/1 kg) | 106,007 | -0.58% | 0.85% | 8.80% |
| Silver (\$/oz) | 36.59 | 1.47% | 0.80% | 5.17% |
| Brent Crude(\$/bbl) | 71.24 | 2.87% | -1.07% | 8.00% |
| Crude Oil (INR/1 bbl) | 5,604.00 | 0.68% | 1.10% | 7.60% |
| NYMEX Crude(\$/bbl) | 68.56 | 3.04% | 4.07% | 8.70% |
| Natural Gas (INR/1 mmbtu) | 292.40 | -8.77% | -4.01% | -3.24% |
| Aluminium (INR/1 kg) | 249.50 | 0.30% | 0.85% | 4.88% |
| Copper (INR/1 kg) | 900.00 | 0.00% | 1.32% | 3.48% |
| Nickel (INR/1 kg) | 1,330.50 | 0.55% | 1.76% | -0.49% |
| Lead (INR/1 kg) | 184.00 | 0.82% | 0.66% | 0.93% |
| Zinc (INR/1 kg) | 260.25 | 0.08% | 0.89% | 1.54% |
| Mentha Oil (INR/1 kg) | 947.10 | 0.61% | 1.01% | 3.10% |
| Baltic Dry Index | 1,443 | -1.03% | -13.33% | 1.48% |

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



Stock Exchanges

Definition: A stock exchange is a regulated marketplace where securities such as stocks, bonds, and other financial instruments are bought and sold. It facilitates transparent and efficient trading between investors.



Explanation

Stock exchanges play a vital role in the financial system by providing liquidity, price discovery, and investor protection. In India, the major stock exchanges are the Bombay Stock Exchange (BSE) and the National Stock Exchange (NSE). For example, when an investor wants to buy shares of Company A, they place an order through a broker, and the transaction is executed on the exchange. The exchange ensures that trades are settled securely and fairly. It also enforces rules and regulations to maintain market integrity.

Mutual Fund Category Performance - Equity & Hybrid

| Category | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund | 3.06 | 2.89 | 4.39 | 19.47 |
| Mid Cap Fund | 4.09 | 0.03 | 4.57 | 27.11 |
| Large & Mid Cap Fund | 3.50 | 1.20 | 5.06 | 23.77 |
| Small Cap Fund | 3.70 | -2.93 | 2.54 | 26.46 |
| Multi Cap Fund | 3.40 | 0.17 | 4.72 | 24.79 |
| Focused Fund | 3.03 | 1.47 | 4.46 | 20.85 |
| Value Fund | 2.89 | 0.78 | 2.43 | 24.97 |
| Contra Fund | 3.26 | 1.31 | 4.77 | 25.98 |
| ELSS | 3.32 | 1.10 | 3.72 | 22.41 |
| Equity Savings | 1.21 | 3.05 | 6.75 | 11.32 |
| Arbitrage Fund | 0.54 | 3.27 | 6.71 | 6.66 |
| Dividend Yield Fund | 2.81 | 1.11 | 2.05 | 24.04 |
| Aggressive Hybrid Fund | 2.44 | 2.53 | 5.67 | 18.41 |
| Balanced Advantage | 1.90 | 2.56 | 5.25 | 14.53 |

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.

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