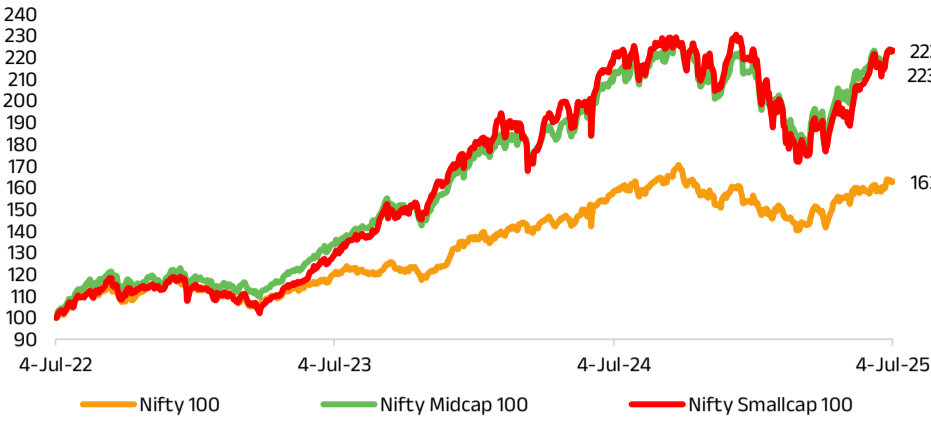


Broad Indices Historical Movement



Source: NSE

Broad Indices

	4-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,461.00	0.22%	-0.69%	3.42%
Nifty 100	26,066.65	0.24%	-0.60%	3.27%
Nifty 200	14,217.15	0.20%	-0.41%	3.23%
Nifty 500	23,562.45	0.17%	-0.24%	3.31%
Nifty Large Midcap 250	16,543.35	0.11%	0.00%	3.11%
Nifty Midcap 150	21,973.15	-0.02%	0.61%	2.99%
Nifty Next 50	68,607.80	0.37%	-0.15%	2.60%
Nifty Smallcap 250	17,762.20	0.02%	0.68%	4.11%

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

Smart Beta Index

Index	4-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,443.05	-0.22%	-1.28%	2.29%
NIFTY 500 Value 50	14,344.65	0.31%	0.27%	3.68%
Nifty 200 Quality 30	21,096.95	0.47%	0.38%	2.96%
Nifty 50 Equal Weight	31,936.75	-0.05%	-0.59%	3.93%
NIFTY Alpha Low Volatility 30	27,151.85	0.37%	-0.37%	2.98%
Nifty High Beta 50	3,850.45	-0.02%	0.33%	2.85%
Nifty Low Volatility 50	25,405.40	0.26%	-0.23%	3.19%
Nifty Midcap150 Momentum 50	63,358.05	-0.21%	-0.29%	2.28%
Nifty PSE	10,109.35	0.61%	0.31%	2.64%
Nifty SME Emerge	14,891.38	0.74%	1.43%	3.29%
Nifty 100 ESG	5,002.85	0.37%	-0.36%	3.50%

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

Sector Indices

Index	4-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,980.40	-0.10%	-0.11%	2.78%
Nifty Bank	57,031.90	0.42%	-0.72%	2.43%
Nifty Consumption	11,776.75	-0.49%	-0.79%	3.08%
Nifty Financial	26,866.30	0.49%	-1.75%	2.29%
Nifty FMCG	54,735.60	0.40%	-0.68%	-1.43%
Nifty Healthcare	14,716.10	0.66%	2.11%	5.93%
Nifty IT	39,166.55	0.80%	0.89%	6.03%
Nifty Media	1,761.75	0.66%	0.80%	1.88%
Nifty Metal	9,580.40	-0.45%	0.02%	4.39%
Nifty MNC	28,902.75	0.07%	0.15%	2.05%
Nifty Pharma	22,384.60	0.81%	2.08%	4.74%
Nifty Realty	971.95	0.91%	-2.21%	-0.41%
Nifty Energy	36,509.60	0.40%	-0.09%	2.17%

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

Nifty 50 Top 5 Gainers

Company	4-Jul-25	Prev_Day	% Change	1 Week
BPCL	346.20	331.50	4.43	3.96
Indian Oil	151.62	147.87	2.54	2.99
Infosys	1,640.70	1,618.70	1.36	2.03
ICICI Bank	1,442.80	1,425.90	1.19	-1.33
Wipro	270.05	267.05	1.12	1.89

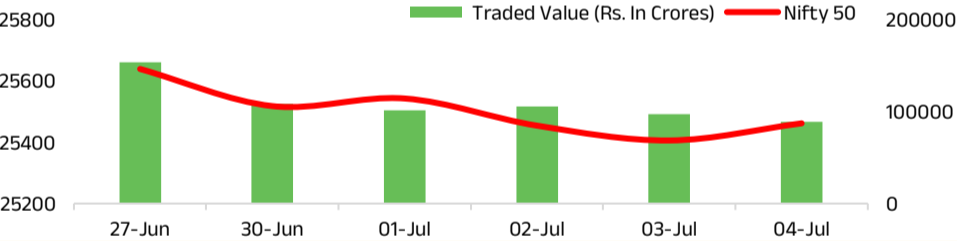
Source: NSE

Nifty 50 Top 5 Losers

Company	4-Jul-25	Prev_Day	% Change	1 Week
Eicher Motors Limited	5,629.00	5716	-1.52	-0.55
Tech Mahindra	1,655.20	1672	-1.00	-1.15
Maruti	12,646.00	12752	-0.83	0.03
IndusInd Bank	856.25	862	-0.71	-0.17
SBI Life Insurance Comp	1,799.70	1810	-0.58	-2.75

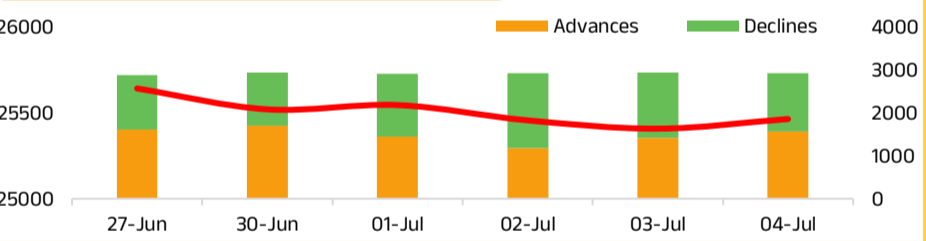
Source: NSE

Nifty 50 vs NSE Trading Volume




Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

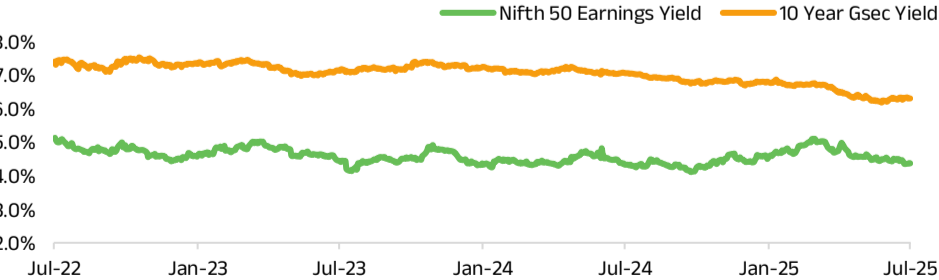
 Indian equity markets rebounded from early losses to close slightly higher, with investors closely watching developments around the U.S.-India trade deal ahead of the July 9 deadline. Market sentiment remained cautious amid uncertainty over potential U.S. reciprocal tariffs and strong U.S. jobs data of Jun 2025, which tempered expectations of a near-term rate cut by the U.S. Fed.

 BEML announced that it has obtained two export contracts valued at \$6.23 million for the provision of heavy-duty bulldozers and motor graders to Russia and Uzbekistan.

 Global energy leader Shell has purchased Raj Petro Specialities, based in Mumbai, to strengthen its presence in the world's third-largest lubricants market.

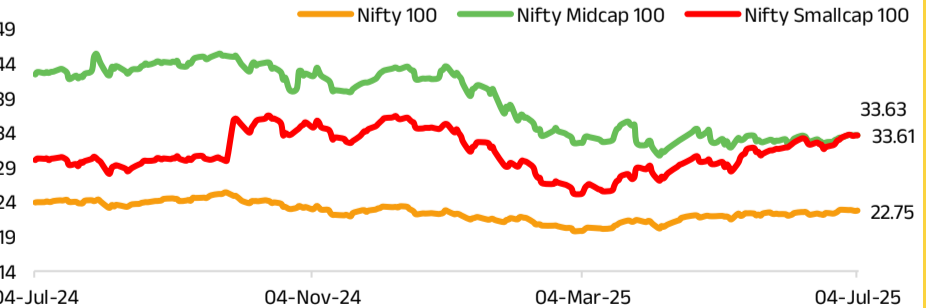
 Ananth Technologies, located in Hyderabad, is poised to be the inaugural private Indian firm to provide satellite communication (satcom) services utilizing a satellite constructed within the country.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



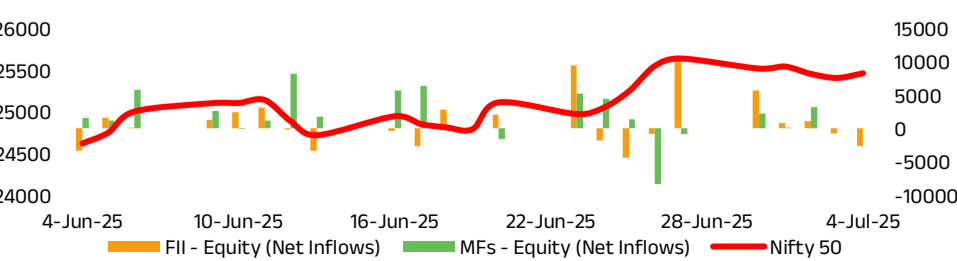
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-2608.57	-1,421	-1,421	-79,321
MF**	3194.57	3,269	3,269	234,255
DII	-1028.84	4,112	4,112	352,587

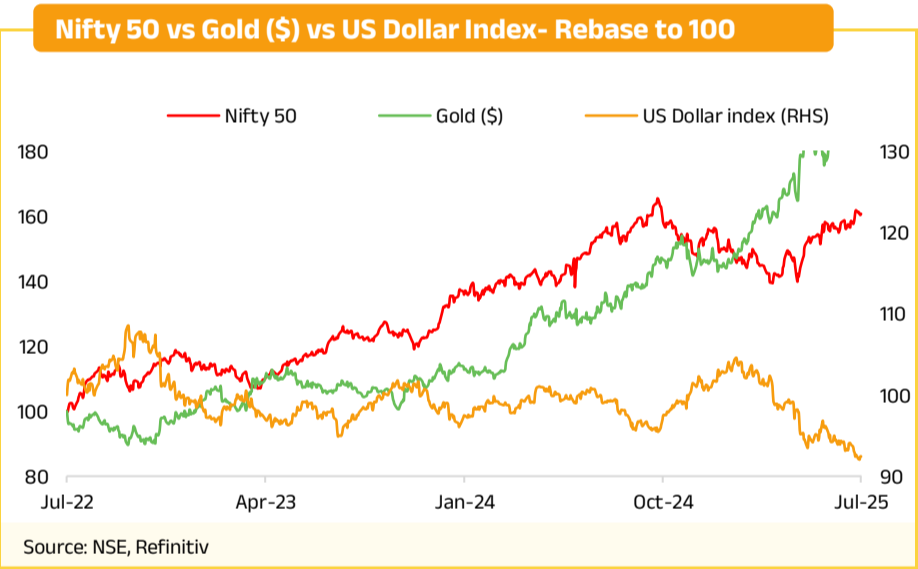
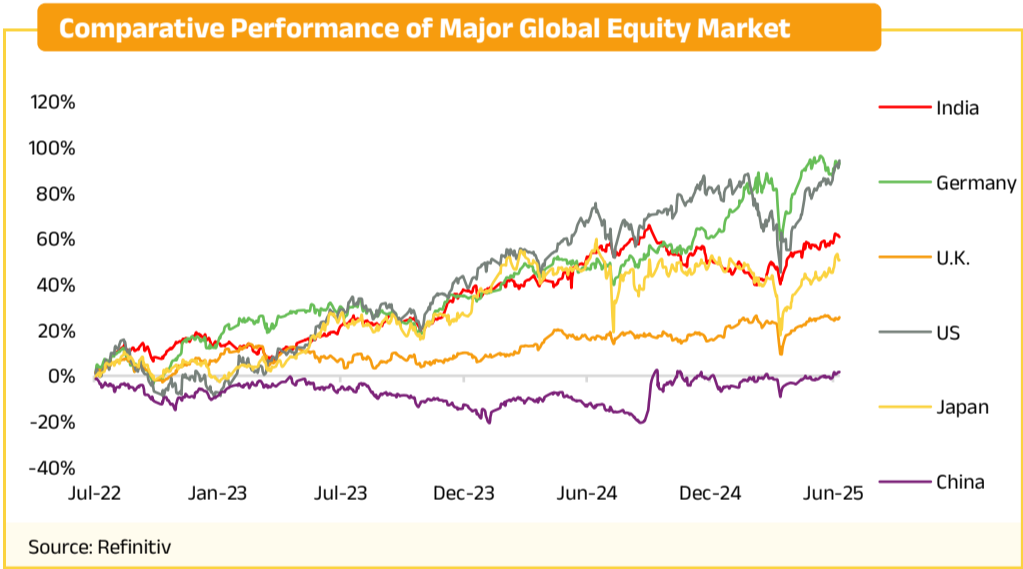
Source: SEBI, NSDL;\*\*As on 2nd Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25540.10	25508.60	0.12%
Near Basis	79.10	103.30	-23.43%
Mid Futures	25652.70	25615.00	0.15%
Mid Basis	191.70	209.70	-8.58%
Near Open Interest (Cr.)	1.35	1.37	-1.73%
Mid Open Interest (Cr.)	0.21	0.19	10.05%
Rollover (%)	14.84	13.50	9.96%
Put Call Ratio (OI)	0.93	0.86	9.05%
Put Call Ratio(Vol)	0.96	0.86	11.50%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2954	5397	28719
Index Options	3990319	3922264	231290
Stock Futures	15861	16039	388287
Stock Options	43203	43587	59084
Total	4052337	3987286	707380
Source: NSE			

Global Equity Market				
Global Indices	4-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.) <sup>[1]</sup>	3437.56	0.84%	1.77%	5.15%
Nasdaq 100 (U.S.) <sup>[1]</sup>	22866.97	0.99%	1.48%	5.27%
FTSE (U.K.)	8822.91	0.00%	0.27%	0.25%
DAX Index (Germany)	23787.45	-0.61%	-1.02%	-2.01%
CAC 40 Index (France)	7696.27	-0.75%	0.06%	-1.39%
SSE Composite (China)	3472.32	0.32%	1.40%	2.85%
Nikkei (Japan)	39810.88	0.06%	-0.85%	5.47%
Kospi (South Korea)	3054.28	-1.99%	-0.05%	10.23%
HangSeng (Hong Kong)	23916.06	-0.64%	-1.52%	1.11%
Strait Times (Singapore)	4013.62	-0.15%	1.20%	2.81%
Ibovespa Sao Paulo (Brazil)	141263.56	0.24%	3.21%	3.11%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8603.00	0.08%	1.04%	0.72%
Jakarta Composite (Indonesia)	6865.19	-0.19%	-0.47%	-2.88%
KLSE (Malaysia)	1550.19	0.08%	1.44%	2.80%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	4-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,609	-0.33%	1.27%	-0.12%
Gold (\$/oz)	3,336.34	0.30%	1.94%	-1.16%
Silver (INR/1 kg)	107,276	-0.06%	2.34%	6.07%
Silver (\$/oz)	36.91	0.22%	2.58%	5.58%
Brent Crude(\$/bbl)	71.67	-0.21%	0.96%	6.38%
Crude Oil (INR/1 bbl)	5,729.00	-0.88%	2.39%	5.72%
NYMEX Crude(\$/bbl) <sup>[1]</sup>	68.03	-0.77%	2.21%	7.35%
Natural Gas (INR/1 mmbtu)	291.50	-2.48%	-3.60%	-8.36%
Aluminium (INR/1 kg)	249.70	-0.12%	0.71%	3.03%
Copper (INR/1 kg)	895.15	-0.76%	0.07%	1.95%
Nickel (INR/1 kg)	1,333.30	-0.25%	0.39%	-0.69%
Lead (INR/1 kg)	185.00	-0.16%	-0.64%	2.07%
Zinc (INR/1 kg)	260.40	-0.42%	-0.57%	0.10%
Mentha Oil (INR/1 kg)	936.80	0.11%	0.41%	2.27%
Baltic Dry Index	1,436	0.14%	-5.59%	-3.56%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



### Equity Valuation Methods

Definition: Equity valuation methods are techniques used to estimate the intrinsic value of a **company's** shares, helping investors determine whether a stock is overvalued, undervalued, or fairly priced.



### Explanation

Common valuation approaches include the Discounted Cash Flow (DCF) method, which projects future cash flows and discounts them to present value, and Relative Valuation, which compares a **company's** financial ratios like P/E or EV/EBITDA with peers. Another method is Asset-Based Valuation, which calculates value based on the **company's** net assets. For example, if Company X has strong future earnings potential, DCF may show a higher intrinsic value than its current market price, indicating a buying opportunity. Each method has its strengths and is chosen based on the nature of the business and available data.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.33	3.55	3.44	19.22
Mid Cap Fund	3.46	0.26	3.12	26.75
Large & Mid Cap Fund	3.25	1.67	3.97	23.46
Small Cap Fund	3.80	-2.36	1.98	26.47
Multi Cap Fund	3.42	0.71	3.75	24.59
Focused Fund	3.12	2.07	3.57	20.60
Value Fund	3.37	1.54	1.63	24.87
Contra Fund	3.51	2.04	3.97	25.80
ELSS	3.46	1.81	2.86	22.26
Equity Savings	1.23	3.23	6.43	11.26
Arbitrage Fund	0.58	3.25	6.71	6.69
Dividend Yield Fund	3.16	1.74	1.20	23.90
Aggressive Hybrid Fund	2.51	3.05	4.95	18.25
Balanced Advantage	2.03	2.96	4.72	14.45
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.				

<sup>[1]</sup>Data as on 03 Jul, 2025