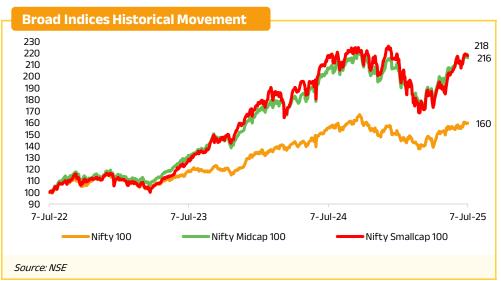
# **Daily Equity Market Pulse -**July 08, 2025

Aditya Birla Sun Life **Mutual Fund** 





#### **Broad Indices** 7-Jul-25 1 Day 1 Week 1 Month 25,461.30 Nifty 50 0.00% -0.22% 1.83% Nifty 100 26,074.55 0.03% -0.25% 1.70% Nifty 200 14,214.05 -0.02% -0.27% 1.56% Nifty 500 23,551.20 -0.05% -0.28% 1.67% Nifty Large Midcap 250 16,524.35 -0.11% -0.29% 1.35% Nifty Midcap 150 21,916.30 -0.26% -0.33% 1.05% 0.17% Nifty Next 50 68,725.80 -0.39% 1.08% -0.20% Nifty Smallcap 250 17,726.35 -0.40% 2.55%

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

Smart Beta Index				
Index	7-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,384.05	-0.19%	-1.62%	0.27%
NIFTY 500 Value 50	14,322.20	-0.16%	-0.30%	2.27%
Nifty 200 Quality 30	21,127.75	0.15%	0.49%	2.24%
Nifty 50 Equal Weight	31,920.30	-0.05%	-0.42%	2.20%
NIFTY Alpha Low Volatility 30	27,158.50	0.02%	-0.11%	1.74%
Nifty High Beta 50	3,832.10	-0.48%	-0.96%	0.45%
Nifty Low Volatility 50	25,473.30	0.27%	0.37%	2.37%
Nifty Midcap150 Momentum 50	63,112.30	-0.39%	-1.36%	0.15%
Nifty PSE	10,081.50	-0.28%	-0.12%	1.14%
Nifty SME Emerge	14,920.46	0.20%	0.93%	2.17%
Nifty 100 ESG	4,999.85	-0.06%	-0.29%	1.74%

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

Nifty 50 Top 5 Gainers Company 7-Jul-25 Prev\_Day % Change 1 Week HUL 2,410.40 2,339.30 3.04 5.05 Britannia Industries Limited 5,884.00 5,771.50 1.95 0.56 Indian Oil 153.75 151.62 1.40 4.62 BPCL 350.50 346.20 1.24 5.59 1,101.90 1,089.70 1.12 0.27 Tata Beverages Source: NSE



Sector Indices				
Index	7-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,943.90	-0.15%	0.30%	1.19%
Nifty Bank	56,949.20	-0.15%	-0.63%	0.66%
Nifty Consumption	11,827.85	0.43%	-0.13%	1.82%
Nifty Financial	26,833.45	-0.12%	-1.25%	-0.06%
Nifty FMCG	55,652.85	1.68%	1.40%	-0.27%
Nifty Healthcare	14,719.40	0.02%	1.77%	4.30%
Nifty IT	38,866.95	-0.76%	-0.21%	4.22%
Nifty Media	1,743.55	-1.03%	-0.62%	2.22%
Nifty Metal	9,522.15	-0.61%	-0.13%	1.23%
Nifty MNC	29,045.60	0.49%	0.37%	1.73%
Nifty Pharma	22,365.05	-0.09%	1.48%	3.14%
Nifty Realty	972.75	0.08%	-1.40%	-6.43%
Nifty Energy	36,532.40	0.06%	-0.10%	1.69%
Source: NSE: Decitive returns indicates green colour, unchanged is vallow and pogetive returns is reco				

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

Nifty 50 Top 5 Lose	rs			
Company	7-Jul-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,623.90	1655	-1.89	-3.74
ONGC	241.52	245	-1.52	-1.10
Ultratech Cem	12,345.00	12506	-1.29	2.08
Hindalco	692.10	699	-1.05	-0.11
Maruti	12,520.00	12646	-1.00	0.97
Source: NSE				



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<u>iĝ</u>i Indian equity markets closed on a flat note as a cautious undertone prevailed due to uncertainty surrounding the approaching Jul 09, 2025 deadline for U.S. reciprocal tariffs. Additionally, robust U.S. jobs data for the month of Jun, 2025 dampened hopes for an imminent interest rate cut by the U.S. Federal Reserve. Meanwhile, tariff-related uncertainty continued to keep investor sentiment muted.

HCLSoftware, has introduced Domino 14.5, a sovereign artificial intelligence

(AI) designed for governments and regulated entities that prioritize their data

## Source: NSE

JSW Infrastructure (JSW Infra) is set to construct container berths for the Syama Prasad Mookerjee Port Authority at Netaji Subhas Dock in Kolkata, with a projected capital expenditure (capex) of Rs. 740 crore.

逾 OLX India has introduced a subscription-based feature known as the Elite Buyer Program, designed for users who desire quicker and more dependable access to pre-owned items. The platform, which draws in excess of 180 million users each year, stated that the new program will operate across key categories such as automobiles, motorcycles, real estate, electronics, mobile

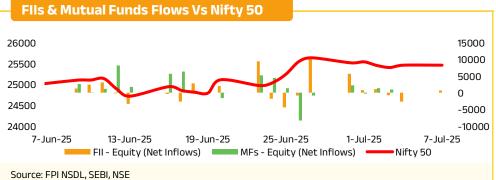


		Institutional Flows (Equity)			
	motreactoriarrie	MS (Equity)			INR Cr.
00	Description	Net	MTD	QTD	YTD
00 0	FII	691.97	-729	-729	-78,629
U	MF**	1022.43	2,105	2,105	233,091
00 000	DII	1853.39	5,965	5,965	354,441
		2 1 1 2025			

-500

Source: SEBI, NSDL;\*\*As on 3rd Jul 2025;

#### Nifty 50 Earnings Yield Vs 10 Year Gsec Yield Nifth 50 Earnings Yield 10 Year Gsec Yield 8.0% 7.0% 6.0% 5.0% 4.0% 3.0% 2.0% Jul-22 Jan-23 Jul-23 Jan-24 Jul-24 Jan-25 Jul-25 Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE





#### F&O Trends

	Latest	Previous	Change %
Near Futures	25538.90	25540.10	0.00%
Near Basis	77.60	79.10	-1.90%
Mid Futures	25650.30	25652.70	-0.01%
Mid Basis	189.00	191.70	-1.41%
Near Open Interest (Cr.)	1.33	1.35	-1.39%
Mid Open Interest (Cr.)	0.26	0.21	22.01%
Rollover (%)	17.49	14.84	17.87%
Put Call Ratio (OI)	0.95	0.93	1.89%
Put Call Ratio(Vol)	0.83	0.96	-13.11%
Source: NSE			

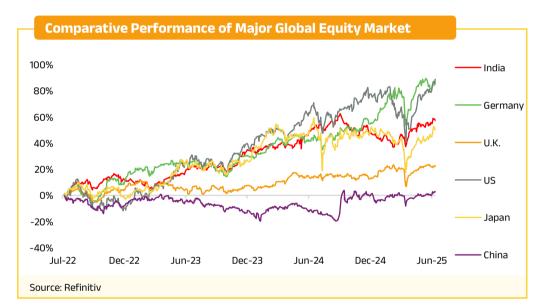
### FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2061	2809	29595
Index Options	870507	876601	275887
Stock Futures	13835	14257	389567
Stock Options	14149	14303	60209
Total	900552	907971	755258
Source: NSE			

# **Global Equity Market**

Global Indices	7-Jul-25	1 Day	1 Week	1 Month	
Russell 1000 Index (U.S.)	3410.86	-0.78%	0.45%	3.77%	
Nasdaq 100 (U.S.)	22685.57	-0.79%	0.03%	4.24%	
FTSE (U.K.)	8806.53	-0.19%	0.52%	-0.36%	
DAX Index (Germany)	24073.67	1.20%	0.69%	-0.95%	
CAC 40 Index (France)	7723.47	0.35%	0.75%	-1.04%	
SSE Composite (China)	3473.13	0.02%	0.83%	2.59%	
Nikkei (Japan)	39587.68	-0.56%	-2.22%	4.89%	
Kospi (South Korea)	3059.47	0.17%	-0.40%	8.80%	
HangSeng (Hong Kong)	23887.83	-0.12%	-0.77%	0.40%	
Strait Times (Singapore)	4031.86	0.45%	1.70%	2.48%	
Ibovespa Sao Paulo (Brazil)	139489.70	-1.26%	0.46%	2.49%	
RTS Index (Russia)	NA	NA	NA	NA	
S&P/ASX 200 (Australia)	8589.30	-0.16%	0.55%	0.86%	
Jakarta Composite (Indonesia)	6900.93	0.52%	-0.39%	-2.99%	
KLSE (Malaysia)	1537.54	-0.82%	0.30%	1.37%	
Source: Refinitiv: Positive returns indicates green colour, unchanged is vellow and negative returns is rose					

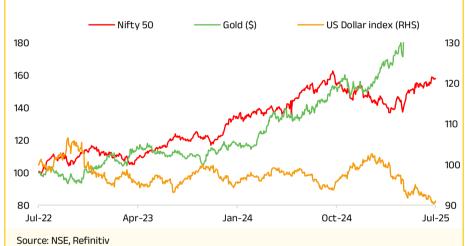
#### Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.



# **Global & Domestic Commodity Market**

Commodity Prices	7-Jul-25	1 Day	1 Week	1 Month	
Gold (INR/10 gm)	96,317	-0.30%	0.67%	-0.34%	
Gold (\$/oz)	3,335.24	-0.03%	0.97%	0.77%	
Silver (INR/1 kg)	107,068	-0.19%	1.28%	1.98%	
Silver (\$/oz)	36.74	-0.46%	1.83%	2.18%	
Brent Crude(\$/bbl)	72.43	1.06%	1.81%	5.12%	
Crude Oil (INR/1 bbl)	5,729.00	0.00%	2.19%	5.41%	
NYMEX Crude(\$/bbl)	69.06	1.51%	4.32%	6.08%	
Natural Gas (INR/1 mmbtu)	291.50	0.00%	-8.88%	-7.58%	
Aluminium (INR/1 kg)	248.25	-0.58%	-0.46%	3.14%	
Copper (INR/1 kg)	890.90	-0.47%	-0.20%	1.54%	
Nickel (INR/1 kg)	1,320.70	-0.95%	0.05%	-1.54%	
Lead (INR/1 kg)	184.10	-0.49%	-1.29%	0.60%	
Zinc (INR/1 kg)	258.95	-0.56%	-1.60%	0.86%	
Mentha Oil (INR/1 kg)	932.80	-0.43%	0.08%	-1.58%	
Baltic Dry Index	1,436	0.00%	-3.56%	-12.06%	
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.					

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





#### Price-to-Earnings (P/E) Ratio

Definition: The Price-to-Earnings (P/E) ratio is a financial metric that compares a **company's** current share price to its earnings per share (EPS), used to assess whether a stock is overvalued or undervalued.

# Explanation

Calculated as P/E = Market Price per Share  $\div$  Earnings per Share, this ratio helps investors gauge how much they are paying for each rupee of earnings. A high P/E may indicate that the stock is overvalued or that investors expect high future growth, while a low P/E could suggest undervaluation or weak growth prospects. For example, if Company **Y's** stock is trading at ₹100 and its EPS is ₹10, the P/E ratio is 10. Comparing this with industry peers helps in making informed investment decisions.

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.73	5.03	3.18	18.36
Mid Cap Fund	1.68	1.65	2.42	25.45
Large & Mid Cap Fund	1.46	3.13	3.43	22.40
Small Cap Fund	2.41	-1.20	1.33	25.42
Multi Cap Fund	1.93	2.13	3.20	23.62
Focused Fund	1.32	3.37	3.11	19.62
Value Fund	1.88	2.91	1.20	23.98
Contra Fund	2.05	3.43	3.49	24.80
ELSS	1.77	3.01	2.43	21.28
Equity Savings	0.78	3.61	6.33	11.01
Arbitrage Fund	0.53	3.21	6.69	6.69
Dividend Yield Fund	1.92	3.37	0.62	23.16
Aggressive Hybrid Fund	1.39	4.12	4.71	17.59
Balanced Advantage	1.14	3.77	4.49	13.98

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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