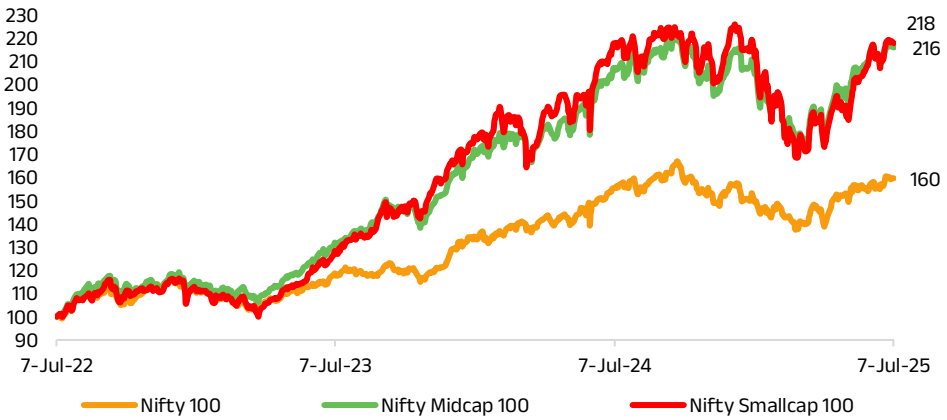


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 7-Jul-25 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|--------|--------|---------|
| Nifty 50 | 25,461.30 | 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% |
| Nifty Next 50 | 68,725.80 | 0.17% | -0.39% | 1.08% |
| Nifty Smallcap 250 | 17,726.35 | -0.20% | -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.

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; 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 |
| Tata Beverages | 1,101.90 | 1,089.70 | 1.12 | 0.27 |

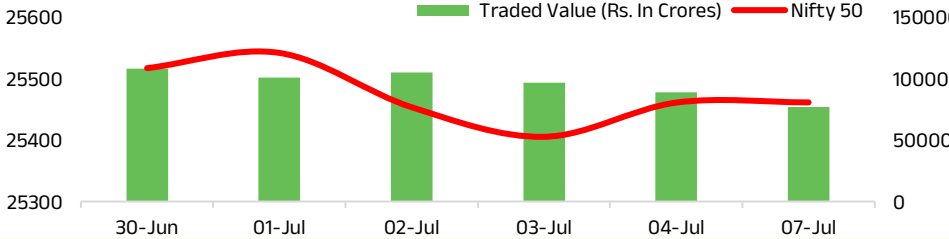
Source: NSE

Nifty 50 Top 5 Losers

| 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 |

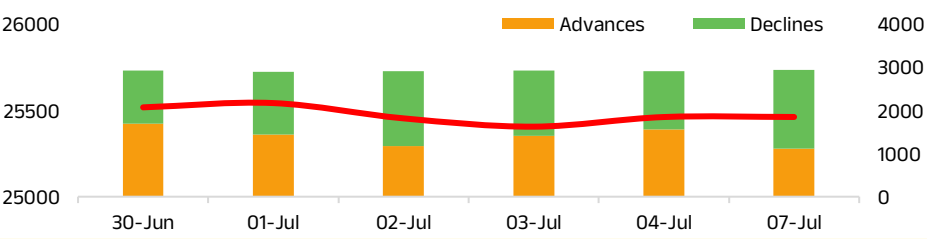
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

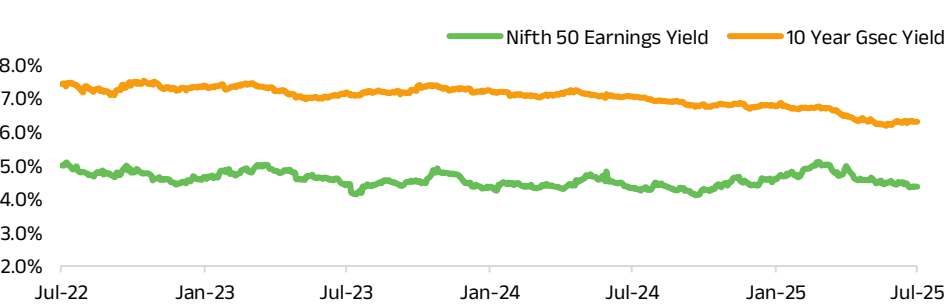
Indian equity markets closed on a flat note as a cautious undertone prevailed due to uncertainty surrounding the approaching Jul 09, 2025 deadline for U.S. reciprocal tariffs. Additionally, robust U.S. jobs data for the month of Jun, 2025 dampened hopes for an imminent interest rate cut by the U.S. Federal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

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.

HCLSoftware, has introduced Domino 14.5, a sovereign artificial intelligence (AI) designed for governments and regulated entities that prioritize their data privacy.

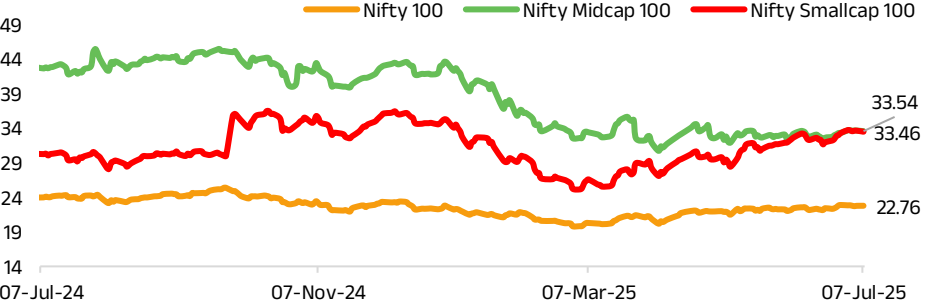
OLX India has introduced a subscription-based feature known as the Elite Buyer Program, designed for users who desire quicker and more dependable access to pre-owned items. The platform, which draws in excess of 180 million users each year, stated that the new program will operate across key categories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

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



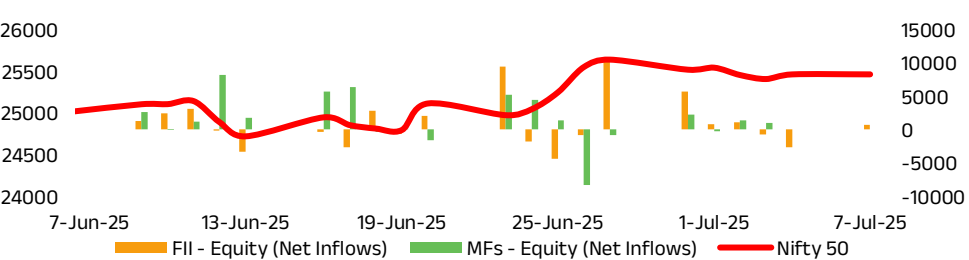
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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 | 691.97 | -729 | -729 | -78,629 |
| MF** | 1022.43 | 2,105 | 2,105 | 233,091 |
| DII | 1853.39 | 5,965 | 5,965 | 354,441 |

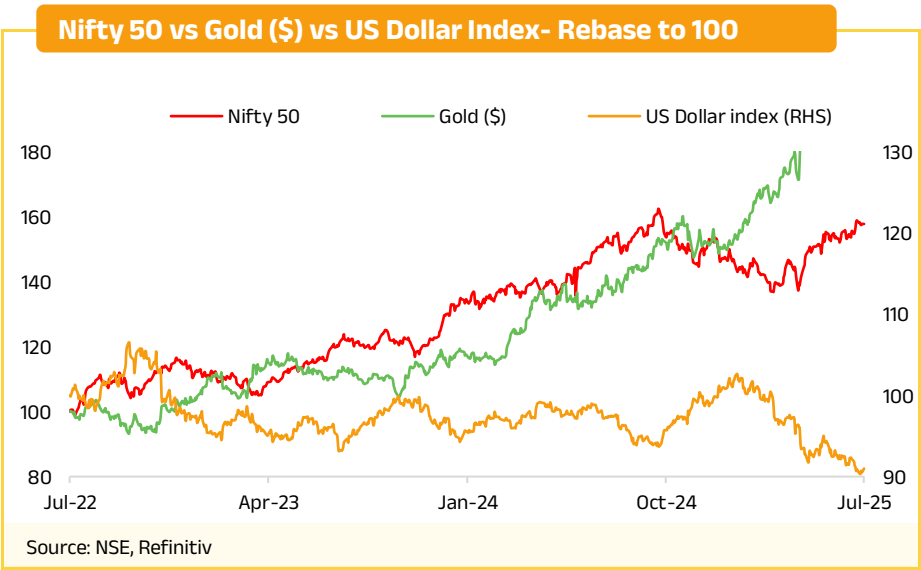
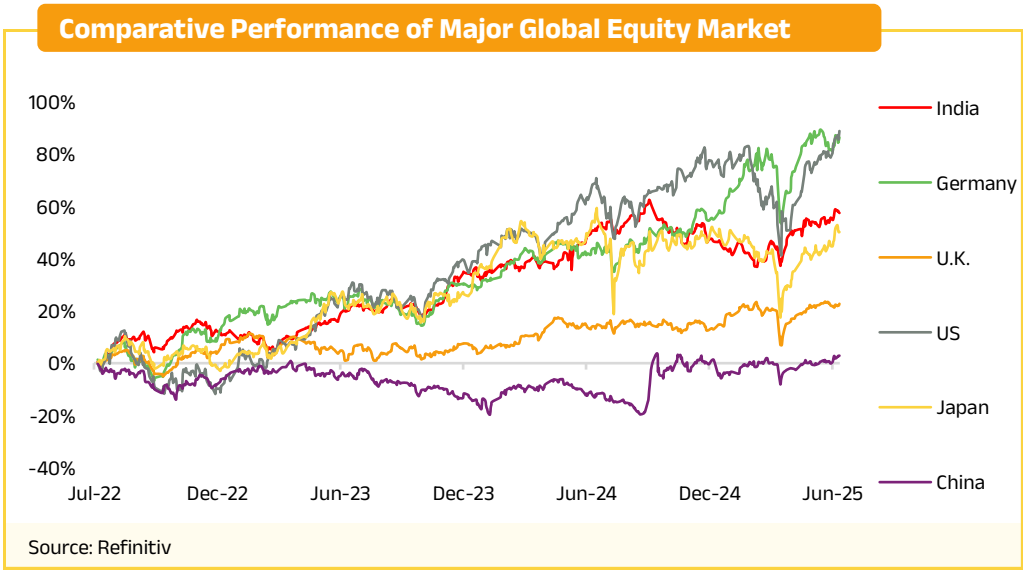
Source: SEBI, NSDL;**As on 3rd Jul 2025;

| 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 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. | | | | |




Term of the Day



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 $P/E = \text{Market Price per Share} \div \text{Earnings per Share}$, 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.

| Mutual Fund Category Performance - Equity & Hybrid | | | | |
|---|---------|---------|--------|--------|
| 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. | | | | |