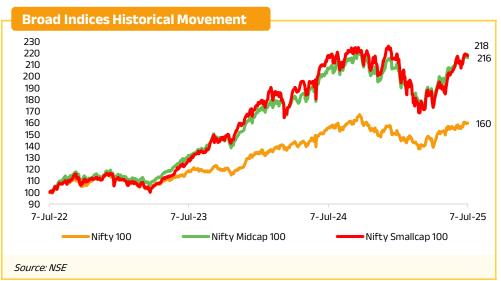
Daily Equity Market Pulse -July 08, 2025

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 | | | | |



privacy.

<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

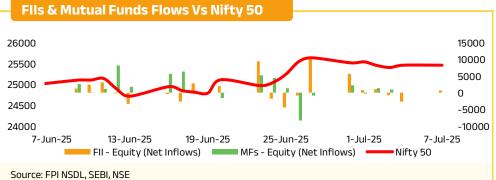


| | | Institutional Flows (Equity) | | | |
|-----------|------------------|------------------------------|-------|-------|---------|
| | motreactoriarrie | MS (Equity) | | | INR Cr. |
| 00 | Description | Net | MTD | QTD | YTD |
| 00 0 | FII | 691.97 | -729 | -729 | -78,629 |
| U | MF** | 1022.43 | 2,105 | 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 | | | |

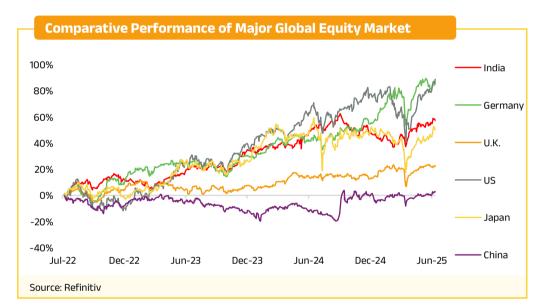
FII Derivative Trade Statistics

| | 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 | | | | | |

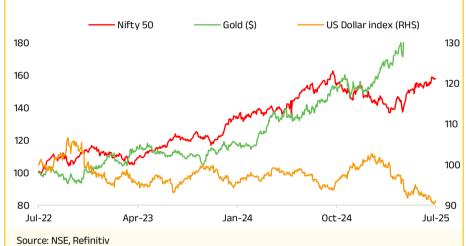
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.



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.

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.