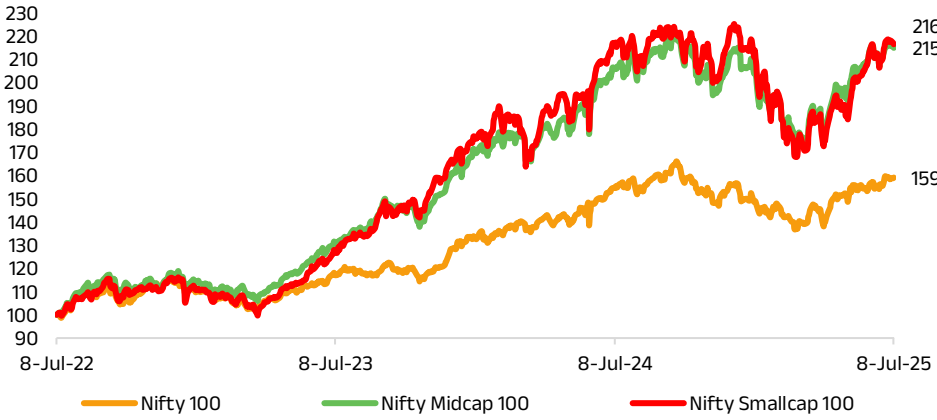


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,522.50	0.24%	-0.08%	2.08%
Nifty 100	26,126.05	0.20%	-0.11%	1.90%
Nifty 200	14,233.25	0.14%	-0.19%	1.69%
Nifty 500	23,572.55	0.09%	-0.18%	1.76%
Nifty Large Midcap 250	16,529.30	0.03%	-0.21%	1.38%
Nifty Midcap 150	21,886.15	-0.14%	-0.30%	0.91%
Nifty Next 50	68,719.05	-0.01%	-0.31%	1.07%
Nifty Smallcap 250	17,684.80	-0.23%	-0.43%	2.31%

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

Smart Beta Index

Index	8-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,430.15	0.15%	-1.51%	0.42%
NIFTY 500 Value 50	14,355.40	0.23%	-0.17%	2.50%
Nifty 200 Quality 30	21,149.95	0.11%	0.89%	2.34%
Nifty 50 Equal Weight	31,944.80	0.08%	-0.37%	2.28%
NIFTY Alpha Low Volatility 30	27,174.30	0.06%	0.01%	1.80%
Nifty High Beta 50	3,832.45	0.01%	-1.03%	0.46%
Nifty Low Volatility 50	25,457.80	-0.06%	0.38%	2.30%
Nifty Midcap150 Momentum 50	62,850.90	-0.41%	-1.30%	-0.26%
Nifty PSE	10,160.50	0.78%	0.73%	1.93%
Nifty SME Emerge	14,859.29	-0.41%	0.31%	1.75%
Nifty 100 ESG	5,005.00	0.10%	0.02%	1.84%

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

Sector Indices

Index	8-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,852.90	-0.38%	0.12%	0.81%
Nifty Bank	57,256.30	0.54%	-0.35%	1.20%
Nifty Consumption	11,788.35	-0.33%	-0.36%	1.48%
Nifty Financial	27,016.85	0.68%	-0.40%	0.63%
Nifty FMCG	55,504.00	-0.27%	1.84%	-0.54%
Nifty Healthcare	14,588.10	-0.89%	0.65%	3.37%
Nifty IT	38,983.25	0.30%	0.39%	4.53%
Nifty Media	1,741.55	-0.11%	0.59%	2.10%
Nifty Metal	9,517.40	-0.05%	-0.49%	1.18%
Nifty MNC	28,964.60	-0.28%	0.65%	1.45%
Nifty Pharma	22,165.90	-0.89%	0.57%	2.22%
Nifty Realty	982.35	0.99%	-0.19%	-5.51%
Nifty Energy	36,605.85	0.20%	0.34%	1.90%

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

Nifty 50 Top 5 Gainers

Company	8-Jul-25	Prev_Day	% Change	1 Week
Kotak Bank	2,224.50	2,149.80	3.47	1.87
Asian Paints	2,484.60	2,442.80	1.71	4.86
NTPC	343.20	337.45	1.70	3.19
Grasim Indus	2,820.80	2,779.10	1.50	-0.96
BPCL	355.60	350.50	1.46	7.09

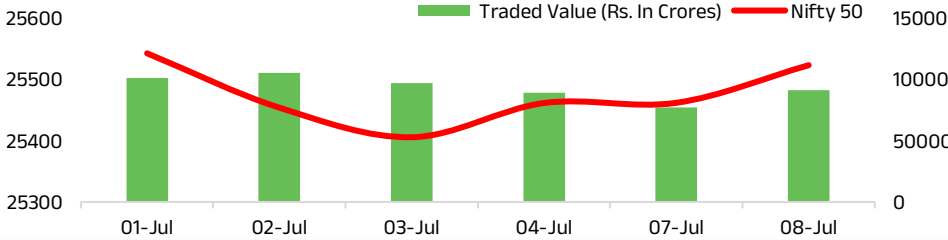
Source: NSE

Nifty 50 Top 5 Losers

Company	8-Jul-25	Prev_Day	% Change	1 Week
Titan Industries Limited	3,441.30	3666	-6.13	-7.00
Cipla	1,488.30	1511	-1.47	-1.81
Bajaj Auto	8,339.50	8464	-1.47	-0.71
United Phos	673.30	680	-1.02	0.34
Hindalco	685.60	692	-0.94	-1.25

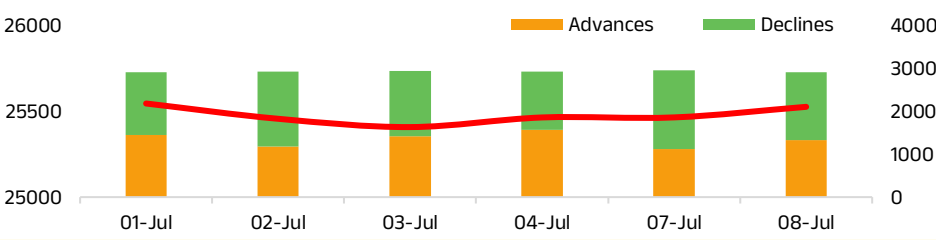
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

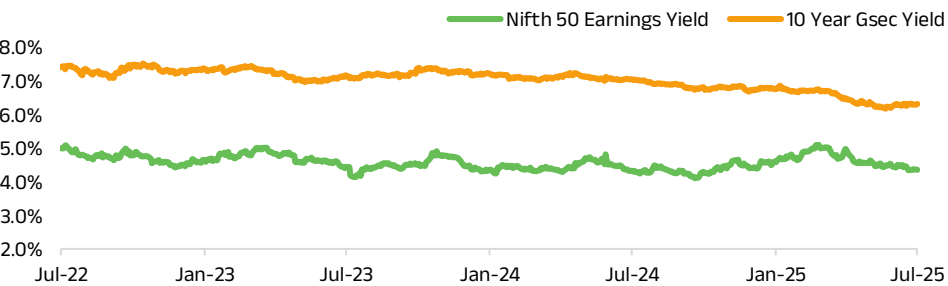
Indian equity markets remained largely rangebound and closed with moderate gains, as cautious optimism around the India–U.S. trade agreement supported sentiment, but lingering uncertainty limited fresh buying. The U.S. decision to postpone the implementation of 25% tariffs on major trade partners has contributed to a more constructive investor sentiment.

Adani Power Ltd declared that it has successfully finalized the acquisition of Vidarbha Industries Power Ltd, which has a capacity of 600 megawatts (MW), via the insolvency process for a total sum of Rs. 4,000 crore.

Hindustan Power has initiated the development of a solar power project with a peak capacity of 435 megawatts (MWp) located in Lalitpur, Uttar Pradesh. The project, awarded by the Uttar Pradesh Power Corporation Ltd (UPPCL) following a competitive bidding process in Apr 2025, is set to provide clean electricity to the state for a duration of 25 years.

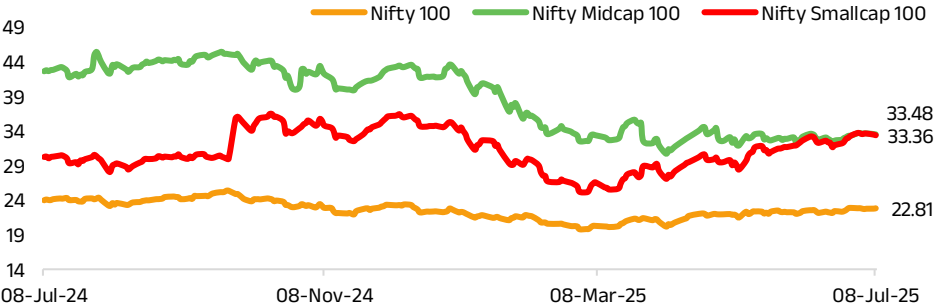
VinFast announced its collaboration with RoadGrid, a provider of EV charging and aftersales solutions, in India, in anticipation of its product launch in the nation.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



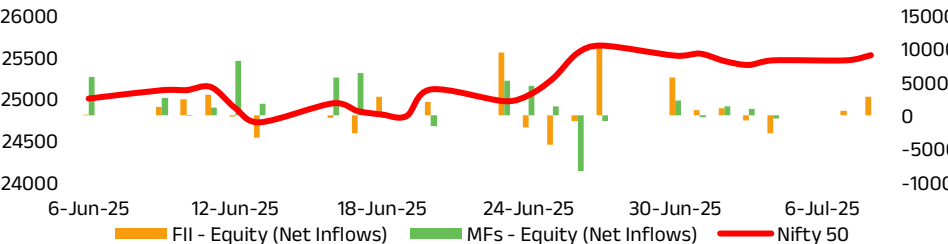
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	2771.19	2,043	2,043	-75,857
MF**	-425.98	1,679	1,679	232,665
DII	1366.82	7,332	7,332	355,808

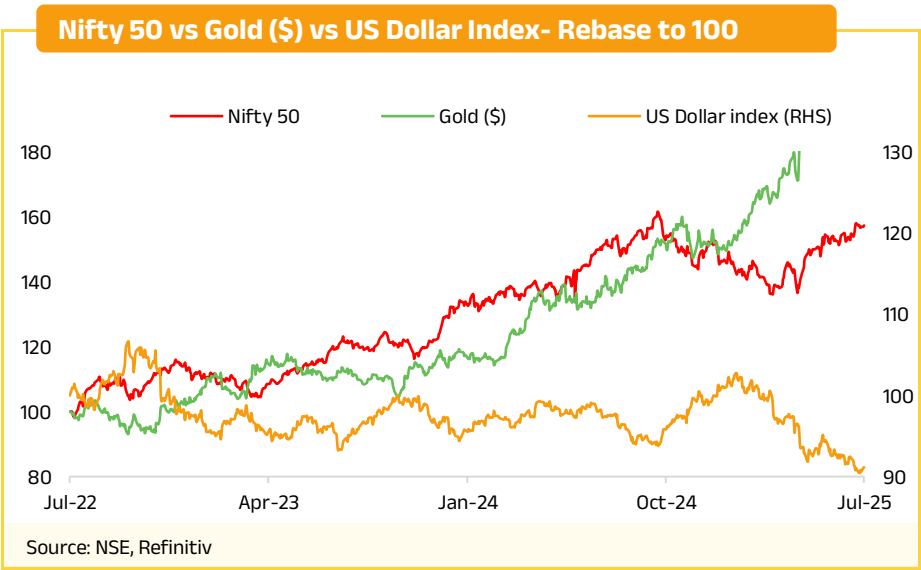
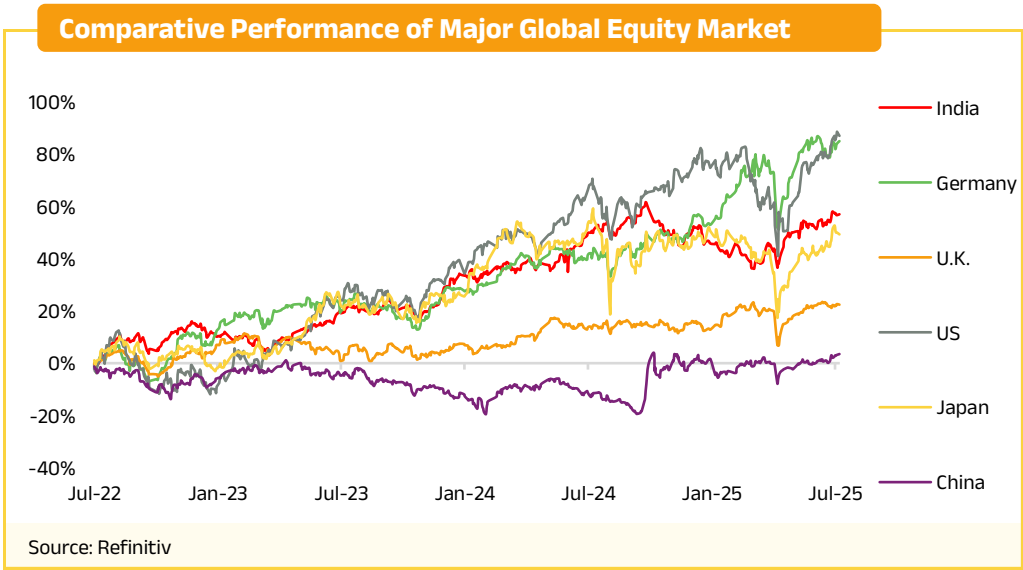
Source: SEBI, NSDL;\*\*As on 4th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25611.90	25538.90	0.29%
Near Basis	89.40	77.60	15.21%
Mid Futures	25728.40	25650.30	0.30%
Mid Basis	205.90	189.00	8.94%
Near Open Interest (Cr.)	1.33	1.33	0.49%
Mid Open Interest (Cr.)	0.32	0.26	23.58%
Rollover (%)	20.40	17.49	16.65%
Put Call Ratio (OI)	1.04	0.95	9.10%
Put Call Ratio(Vol)	0.79	0.83	-5.35%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2135	2802	30589
Index Options	874580	878248	290337
Stock Futures	13233	13426	388984
Stock Options	14035	14027	60849
Total	903982	908503	770759
Source: NSE			

Global Equity Market				
Global Indices	8-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3408.34	-0.07%	0.49%	3.69%
Nasdaq 100 (U.S.)	22702.25	0.07%	1.00%	4.32%
FTSE (U.K.)	8854.18	0.54%	0.78%	0.18%
DAX Index (Germany)	24206.91	0.55%	2.25%	-0.40%
CAC 40 Index (France)	7766.71	0.56%	1.36%	-0.49%
SSE Composite (China)	3497.48	0.70%	1.15%	3.31%
Nikkei (Japan)	39688.81	0.26%	-0.74%	5.16%
Kospi (South Korea)	3114.95	1.81%	0.82%	10.77%
HangSeng (Hong Kong)	24148.07	1.09%	0.31%	1.49%
Strait Times (Singapore)	4047.86	0.40%	1.46%	2.89%
Ibovespa Sao Paulo (Brazil)	139302.85	-0.13%	-0.18%	2.35%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8590.70	0.02%	0.58%	0.88%
Jakarta Composite (Indonesia)	6904.39	0.05%	-0.16%	-2.94%
KLSE (Malaysia)	1530.14	-0.48%	-0.74%	0.88%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	8-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,537	0.23%	-0.37%	-0.11%
Gold (\$/oz)	3,300.45	-1.04%	-1.15%	-0.28%
Silver (INR/1 kg)	107,381	0.29%	0.71%	2.28%
Silver (\$/oz)	36.78	0.11%	2.00%	2.29%
Brent Crude(\$/bbl)	73.96	2.11%	6.80%	7.34%
Crude Oil (INR/1 bbl)	5,829.00	1.75%	4.73%	7.25%
NYMEX Crude(\$/bbl)	69.45	0.56%	4.37%	6.68%
Natural Gas (INR/1 mmbtu)	292.80	0.45%	-8.64%	-7.17%
Aluminium (INR/1 kg)	248.50	0.10%	-0.10%	3.24%
Copper (INR/1 kg)	898.50	0.85%	-0.17%	2.41%
Nickel (INR/1 kg)	1,323.30	0.20%	0.01%	-1.34%
Lead (INR/1 kg)	182.85	-0.68%	0.19%	-0.08%
Zinc (INR/1 kg)	257.60	-0.52%	-0.94%	0.33%
Mentha Oil (INR/1 kg)	935.70	0.31%	-0.61%	-1.28%
Baltic Dry Index	1,431	-0.35%	-1.85%	-12.37%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Primary Instrument

Definition: It is a type of financial instrument whose price is derived from its own market value or whose price is not derived from any other instrument. It simply means that the price of the primary instrument is directly determined by the market.



Explanation

Primary instruments include stocks, bonds, Certificate of Deposit (CD) and anything else that has its own value. In contrast to this, the price of derivative instruments, such as options, swaps and futures, is based on the value of their underlying assets like spot equity, currency, commodity and bonds. Hence, derivative products are known non-primary instruments.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.96	5.72	3.51	18.20
Mid Cap Fund	1.66	2.76	2.86	25.41
Large & Mid Cap Fund	1.56	4.09	3.79	22.27
Small Cap Fund	2.31	-0.12	1.60	25.24
Multi Cap Fund	2.03	3.14	3.65	23.47
Focused Fund	1.49	4.38	3.49	19.48
Value Fund	2.04	3.63	1.39	23.81
Contra Fund	2.21	4.14	3.77	24.64
ELSS	1.87	3.87	2.78	21.13
Equity Savings	0.79	3.83	6.41	10.94
Arbitrage Fund	0.50	3.19	6.67	6.67
Dividend Yield Fund	2.08	3.85	0.67	22.95
Aggressive Hybrid Fund	1.48	4.78	4.91	17.46
Balanced Advantage	1.24	4.25	4.66	13.92
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.				