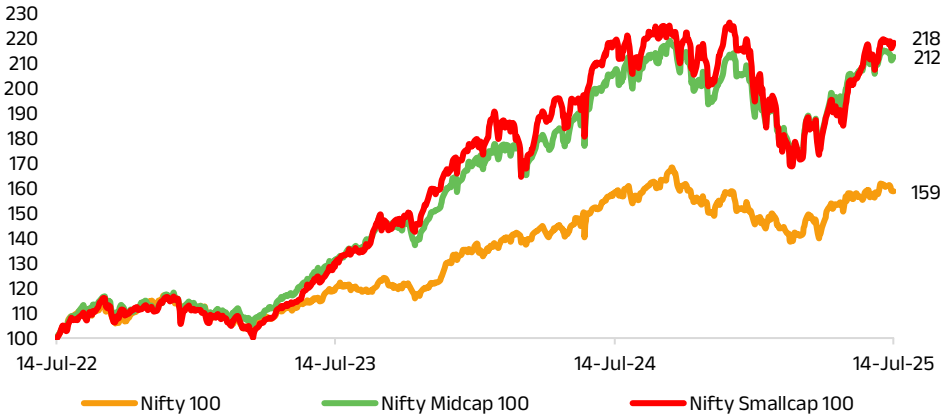


Broad Indices Historical Movement



Source: NSE

Broad Indices

	14-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,082.30	-0.27%	-1.49%	1.47%
Nifty 100	25,724.15	-0.14%	-1.34%	1.55%
Nifty 200	14,036.80	0.00%	-1.25%	1.53%
Nifty 500	23,309.05	0.11%	-1.03%	1.76%
Nifty Large Midcap 250	16,359.75	0.25%	-1.00%	1.55%
Nifty Midcap 150	21,773.90	0.64%	-0.65%	1.59%
Nifty Next 50	68,285.65	0.47%	-0.64%	1.95%
Nifty Smallcap 250	17,808.65	0.92%	0.46%	3.48%

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

Smart Beta Index

Index	14-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,980.50	0.20%	-1.29%	-0.14%
NIFTY 500 Value 50	14,239.55	0.40%	-0.58%	2.40%
Nifty 200 Quality 30	20,790.55	-0.08%	-1.60%	0.89%
Nifty 50 Equal Weight	31,483.70	-0.16%	-1.37%	1.49%
NIFTY Alpha Low Volatility 30	26,781.75	0.10%	-1.39%	0.64%
Nifty High Beta 50	3,826.90	0.72%	-0.14%	2.48%
Nifty Low Volatility 50	25,116.65	-0.12%	-1.40%	1.43%
Nifty Midcap150 Momentum 50	62,144.40	0.46%	-1.53%	-0.13%
Nifty PSE	10,044.55	-0.01%	-0.37%	1.60%
Nifty SME Emerge	15,051.70	0.27%	0.88%	3.11%
Nifty 100 ESG	4,933.90	-0.07%	-1.32%	1.34%

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

Sector Indices

Index	14-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,552.00	0.25%	-1.64%	0.96%
Nifty Bank	56,765.35	0.02%	-0.32%	2.23%
Nifty Consumption	11,665.60	0.38%	-1.37%	2.57%
Nifty Financial	26,802.25	-0.19%	-0.12%	1.77%
Nifty FMCG	56,025.60	0.21%	0.67%	2.75%
Nifty Healthcare	14,607.70	1.00%	-0.76%	1.95%
Nifty IT	37,273.70	-1.11%	-4.10%	-3.11%
Nifty Media	1,727.50	1.36%	-0.92%	0.08%
Nifty Metal	9,407.95	0.27%	-1.20%	1.61%
Nifty MNC	29,059.95	0.41%	0.05%	3.11%
Nifty Pharma	22,410.35	0.83%	0.20%	1.93%
Nifty Realty	976.25	1.39%	0.36%	-3.06%
Nifty Energy	36,201.05	0.29%	-0.91%	1.29%

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

Nifty 50 Top 5 Gainers

Company	14-Jul-25	Prev_Day	% Change	1 Week
Titan Industries Limited	3,404.70	3,361.60	1.28	-7.13
United Phos	659.50	652.80	1.03	-3.05
IndusInd Bank	867.60	858.85	1.02	1.54
ONGC	244.22	241.76	1.02	1.12
SBI Life Insurance Co.	1,851.30	1,835.20	0.88	2.38

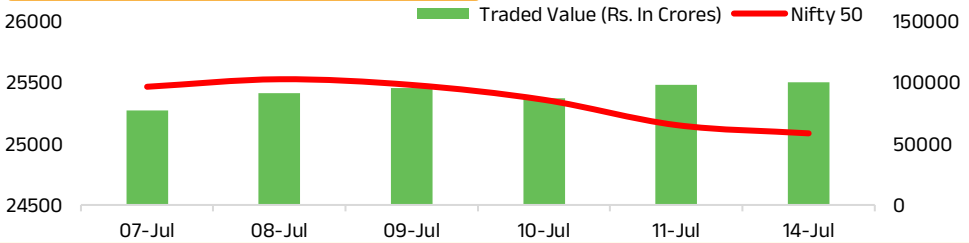
Source: NSE

Nifty 50 Top 5 Losers

Company	14-Jul-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,576.70	1603	-1.61	-2.91
Wipro	254.25	258	-1.57	-5.04
Infosys	1,570.30	1595	-1.54	-3.48
Asian Paints	2,401.60	2439	-1.54	-1.69
TCS	3,222.70	3266	-1.33	-5.54

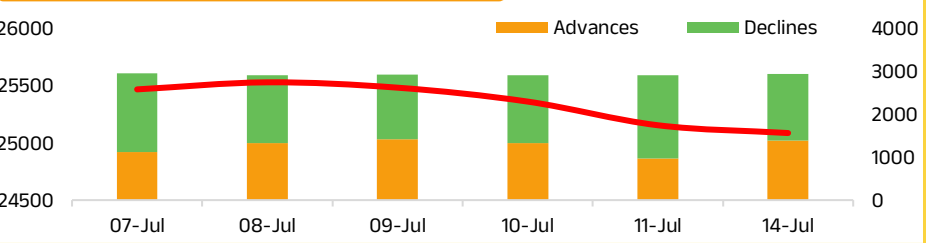
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

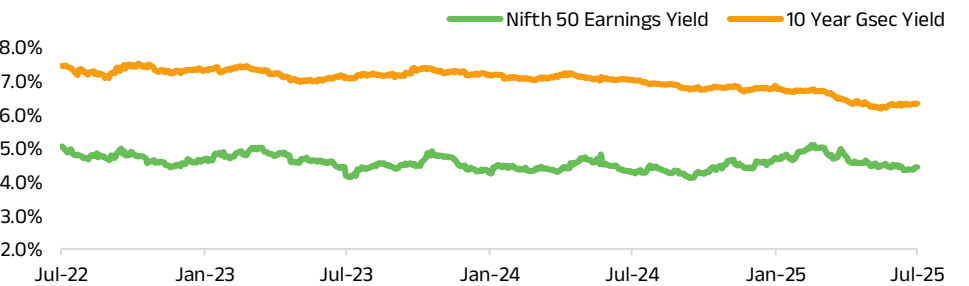
 Indian equity markets declined as the U.S. President escalated his trade offensive, triggering increased volatility in global markets. Market sentiment was further weighed down by concerns over the Russia-Ukraine conflict.

 Titagarh Rail Systems Ltd has obtained a 40-acre land parcel on lease from the West Bengal government for Rs.126 crore to enhance the production of Vande Bharat and metro coaches. A lease agreement for 99 years was formalised with the state on 12 Jul 2025, with a total consideration of Rs. 126.63 crore.

 SAEL Industries Ltd has announced an investment of Rs. 8,200 crore (\$954.04 million) to establish a manufacturing facility for integrated solar cells and modules with a capacity of 5 gigawatts (GW) per year in the northern state of Uttar Pradesh.

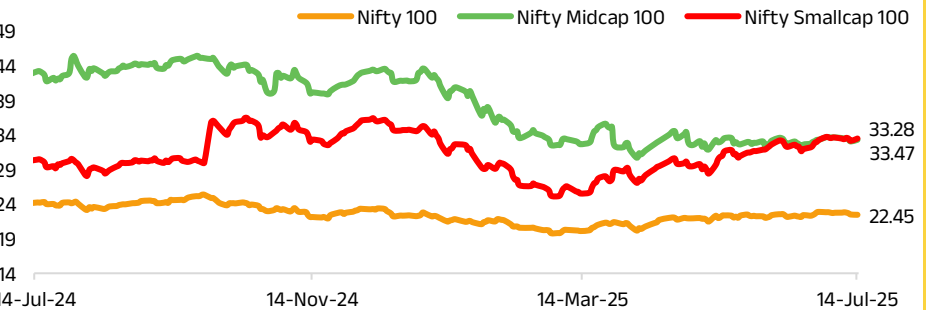
 Tata Steel's main steelmaking facility in the UK, is poised for a fresh start as the company initiates construction on an electric arc furnace (EAF), indicating a transition towards low-carbon steel manufacturing.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



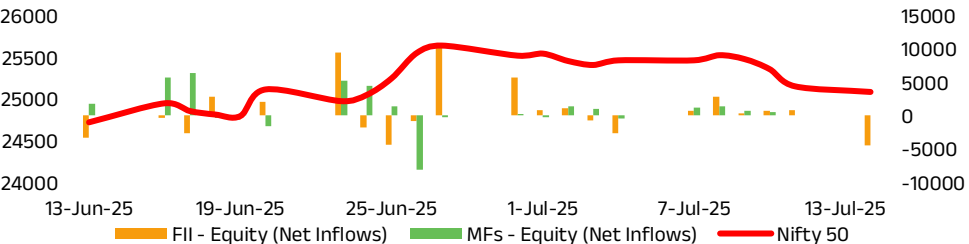
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-4495.01	-656	-656	-78,556
MF**	489.6	5,425	5,425	238,476
DII	1787.68	14,191	14,191	362,666

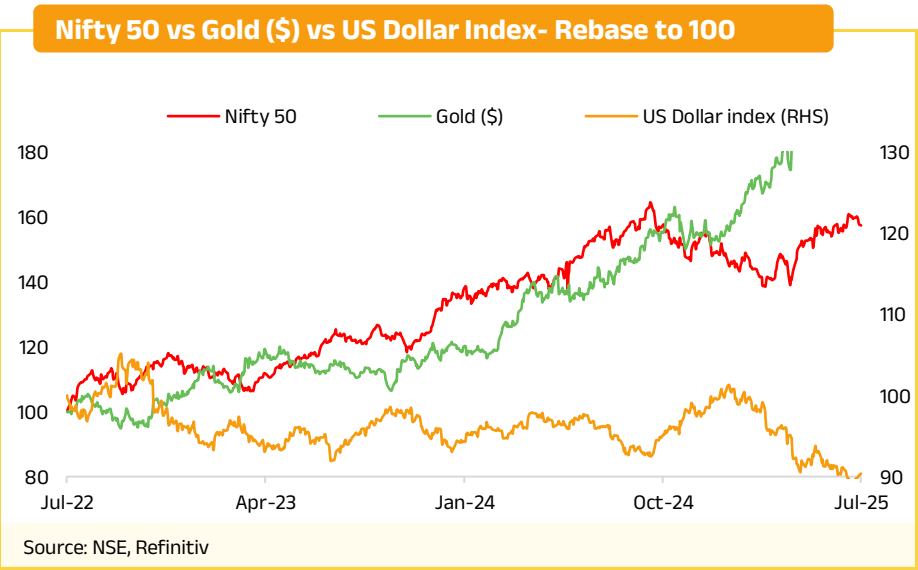
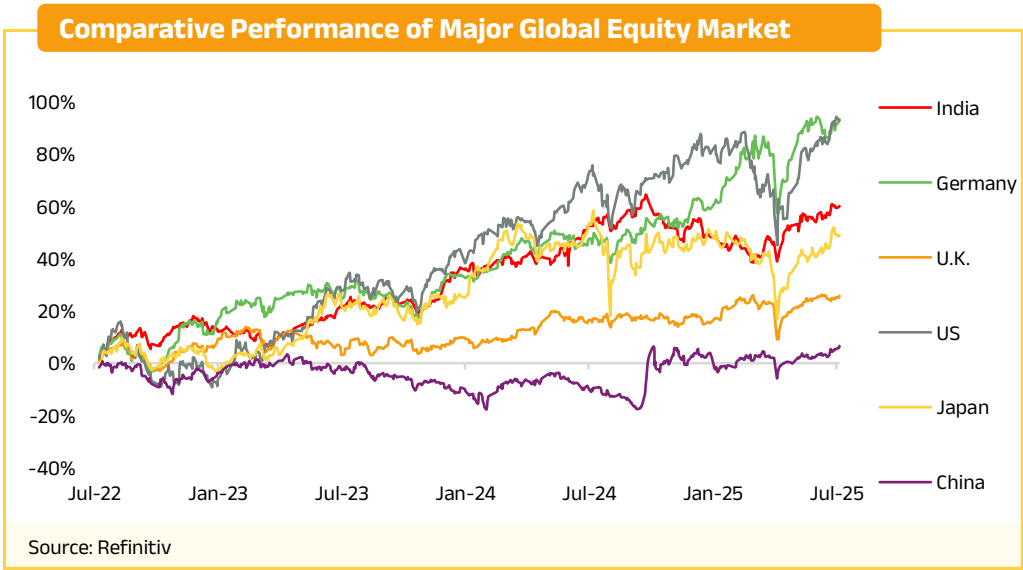
Source: SEBI, NSDL;**As on 10th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25167.50	25223.40	-0.22%
Near Basis	85.20	73.55	15.84%
Mid Futures	25268.80	25327.50	-0.23%
Mid Basis	186.50	177.65	4.98%
Near Open Interest (Cr.)	1.37	1.35	1.83%
Mid Open Interest (Cr.)	0.44	0.39	12.95%
Rollover (%)	26.12	24.24	7.75%
Put Call Ratio (OI)	0.72	0.76	-5.26%
Put Call Ratio(Vol)	0.94	0.98	-4.16%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2450	5989	33150
Index Options	722318	728040	291723
Stock Futures	17672	19337	385658
Stock Options	20689	19945	54150
Total	763130	773312	764682
Source: NSE			

Global Equity Market				
Global Indices	14-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3431.82	0.21%	0.61%	4.96%
Nasdaq 100 (U.S.)	22855.63	0.33%	0.75%	5.66%
FTSE (U.K.)	8998.06	0.64%	2.17%	1.67%
DAX Index (Germany)	24160.64	-0.39%	0.36%	2.74%
CAC 40 Index (France)	7808.17	-0.27%	1.10%	1.61%
SSE Composite (China)	3519.65	0.27%	1.34%	4.22%
Nikkei (Japan)	39459.62	-0.28%	-0.32%	4.30%
Kospi (South Korea)	3202.03	0.83%	4.66%	10.62%
HangSeng (Hong Kong)	24203.32	0.26%	1.32%	1.30%
Strait Times (Singapore)	4109.21	0.52%	1.92%	5.06%
Ibovespa Sao Paulo (Brazil)	135298.99	-0.65%	-3.00%	-1.39%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8570.40	-0.11%	-0.22%	0.27%
Jakarta Composite (Indonesia)	7097.15	0.71%	2.84%	-0.96%
KLSE (Malaysia)	1537.51	0.09%	0.00%	1.28%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	14-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,961	0.89%	1.71%	-0.78%
Gold (\$/oz)	3,343.52	-0.36%	0.25%	-2.58%
Silver (INR/1 kg)	113,788	3.21%	6.28%	7.44%
Silver (\$/oz)	38.13	-0.60%	3.80%	5.08%
Brent Crude(\$/bbl)	72.56	-1.33%	0.18%	-4.22%
Crude Oil (INR/1 bbl)	5,877.00	3.16%	2.58%	0.51%
NYMEX Crude(\$/bbl)	68.09	-2.07%	-1.40%	-7.54%
Natural Gas (INR/1 mmbtu)	284.50	-0.39%	-2.40%	-4.43%
Aluminium (INR/1 kg)	249.65	-0.20%	0.56%	3.05%
Copper (INR/1 kg)	882.00	-0.18%	-1.00%	0.80%
Nickel (INR/1 kg)	1,327.70	0.39%	0.53%	0.72%
Lead (INR/1 kg)	182.00	-0.52%	-1.14%	-1.89%
Zinc (INR/1 kg)	260.25	-0.38%	0.50%	2.62%
Mentha Oil (INR/1 kg)	922.50	-0.94%	-1.10%	-2.79%
Baltic Dry Index	1,783	7.22%	24.16%	-9.40%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				



Term of the Day



Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.80	7.60	1.50	18.28
Mid Cap Fund	2.19	7.82	2.25	25.24
Large & Mid Cap Fund	1.95	7.80	2.66	22.30
Small Cap Fund	3.00	6.14	2.03	25.45
Multi Cap Fund	2.29	7.27	2.73	23.49
Focused Fund	1.84	7.47	2.14	19.67
Value Fund	2.24	6.56	0.19	23.91
Contra Fund	2.61	7.21	2.47	24.80
ELSS	2.03	7.38	1.64	21.26
Equity Savings	0.92	4.70	5.83	11.00
Arbitrage Fund	0.36	3.21	6.53	6.67
Dividend Yield Fund	1.61	6.34	-1.19	23.10
Aggressive Hybrid Fund	1.59	6.92	3.60	17.50
Balanced Advantage	1.37	5.69	3.56	13.90
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.				