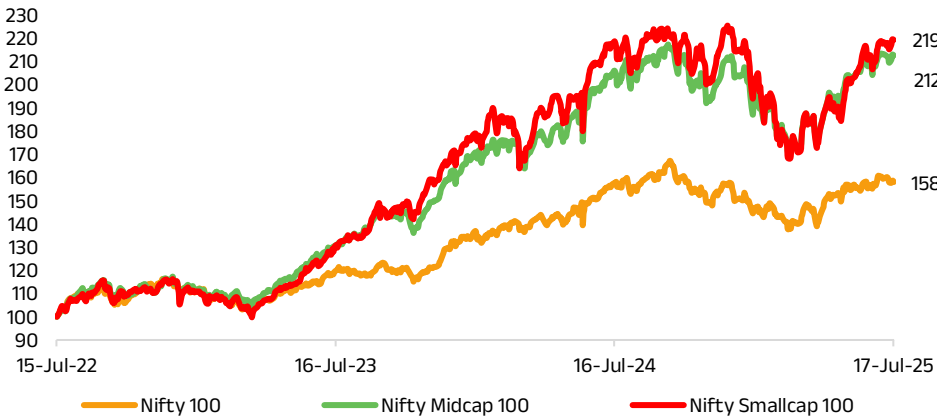


Broad Indices Historical Movement



Source: NSE

Broad Indices

	17-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,111.45	-0.40%	-0.96%	1.04%
Nifty 100	25,776.45	-0.37%	-0.75%	1.30%
Nifty 200	14,079.55	-0.34%	-0.52%	1.41%
Nifty 500	23,419.70	-0.22%	-0.22%	1.91%
Nifty Large Midcap 250	16,464.00	-0.16%	0.06%	1.90%
Nifty Midcap 150	22,006.25	0.05%	0.86%	2.54%
Nifty Next 50	68,711.45	-0.23%	0.27%	2.56%
Nifty Smallcap 250	18,032.30	0.27%	1.47%	4.98%

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

Smart Beta Index

Index	17-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,897.75	-0.75%	-1.12%	-1.10%
NIFTY 500 Value 50	14,334.10	0.01%	0.57%	3.35%
Nifty 200 Quality 30	20,892.65	-0.32%	-0.47%	0.50%
Nifty 50 Equal Weight	31,584.90	-0.20%	-0.55%	1.47%
NIFTY Alpha Low Volatility 30	26,788.35	-0.26%	-0.71%	0.51%
Nifty High Beta 50	3,851.40	-0.23%	0.58%	3.47%
Nifty Low Volatility 50	25,198.10	-0.13%	-0.46%	1.25%
Nifty Midcap150 Momentum 50	62,456.10	-0.29%	-0.30%	-0.31%
Nifty PSE	10,036.75	-0.25%	-0.70%	1.14%
Nifty SME Emerge	15,234.68	0.42%	1.39%	4.08%
Nifty 100 ESG	4,944.95	-0.40%	-0.67%	1.37%

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

Sector Indices

Index	17-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	24,002.50	-0.04%	0.36%	3.34%
Nifty Bank	56,828.80	-0.59%	-0.22%	2.00%
Nifty Consumption	11,772.20	-0.19%	0.39%	3.06%
Nifty Financial	26,809.45	-0.40%	-0.65%	1.35%
Nifty FMCG	56,843.05	0.28%	2.18%	3.90%
Nifty Healthcare	14,763.90	0.18%	2.15%	4.42%
Nifty IT	37,138.55	-1.39%	-3.23%	-5.63%
Nifty Media	1,754.25	-0.25%	1.28%	1.79%
Nifty Metal	9,423.35	0.67%	0.00%	2.16%
Nifty MNC	29,254.85	0.18%	1.02%	3.19%
Nifty Pharma	22,680.35	0.38%	2.73%	4.89%
Nifty Realty	1,001.10	1.24%	2.71%	-1.24%
Nifty Energy	36,438.25	0.24%	-0.03%	1.68%

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

Nifty 50 Top 5 Gainers

Company	17-Jul-25	Prev_Day	% Change	1 Week
United Phos	692.65	671.45	3.16	4.69
Tata Beverages	1,105.80	1,081.50	2.25	1.55
Hindalco	674.55	666.75	1.17	-0.07
Titan Industries Limited	3,433.30	3,417.30	0.47	0.39
Cipla	1,482.40	1,475.80	0.45	0.31

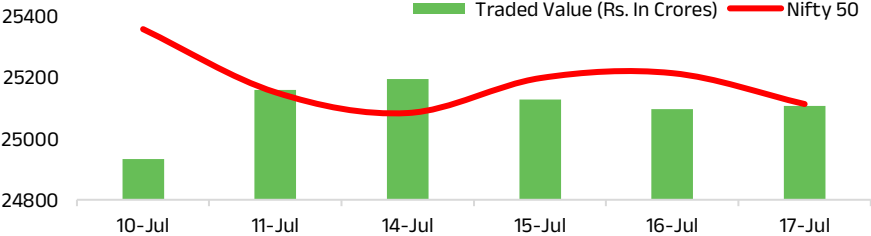
Source: NSE

Nifty 50 Top 5 Losers

Company	17-Jul-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,563.70	1608	-2.75	-2.27
IndusInd Bank	865.10	880	-1.67	1.44
Infosys	1,583.50	1608	-1.52	-2.00
SBI Life Insurance Company Limited	1,802.80	1829	-1.44	-0.41
HCL Tech	1,543.90	1563	-1.21	-7.20

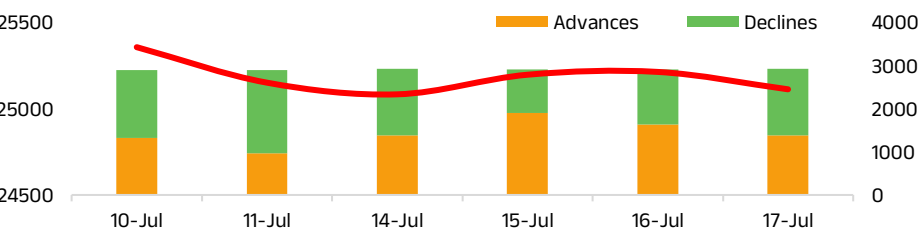
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

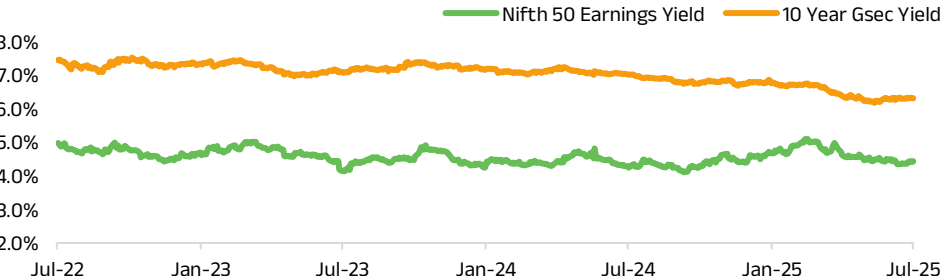
Indian equity markets declined as investors remained cautious amid subdued Q1FY26 earnings from domestic corporates, particularly in the technology and banking sectors. Sentiment further weakened after the U.S. President signaled a potential trade deal with India, coinciding with upcoming bilateral talks. Prolonged negotiations are straining Indian businesses, disrupting exports, operations, and the acquisition of new U.S. clients.

Tata Electronics has signed a Memorandum of Understanding (MoU) with German tech giant Robert Bosch GmbH to collaborate in key areas of the electronics and semiconductor sectors. The MoU outlines plans for joint efforts in chip packaging and manufacturing.

LTIMindtree reported an 11% YoY growth in its Q1 FY26 consolidated net profit, reaching Rs. 1,255 crore compared to Rs. 1,135 crore in the same period last year. Revenue from operations rose 8% to Rs. 9,841 crore, up from Rs. 9,143 crore a year ago.

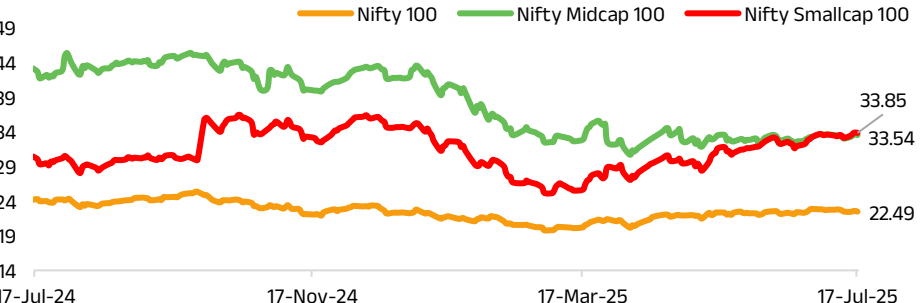
Wipro posted an 11% increase in its Q1 FY26 consolidated net profit at Rs. 3,330 crore, compared to Rs. 3,003 crore in the year-ago period. The profit attributable to equity holders slightly exceeded Street estimates of Rs. 3,233 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



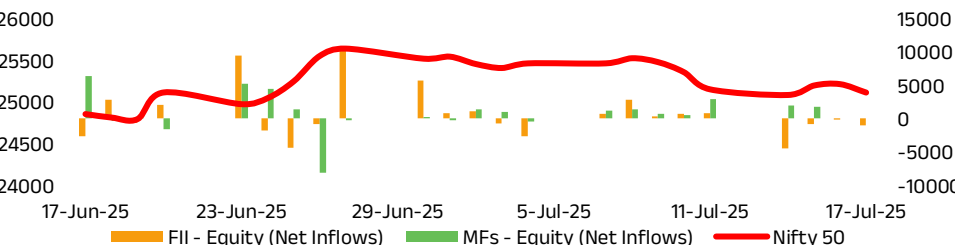
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	INR Cr.
				YTD
FII	-1040.59	-2,660	-2,660	-80,560
MF**	1715.26	11,948	11,948	245,000
DII	2820.77	19,790	19,790	368,265

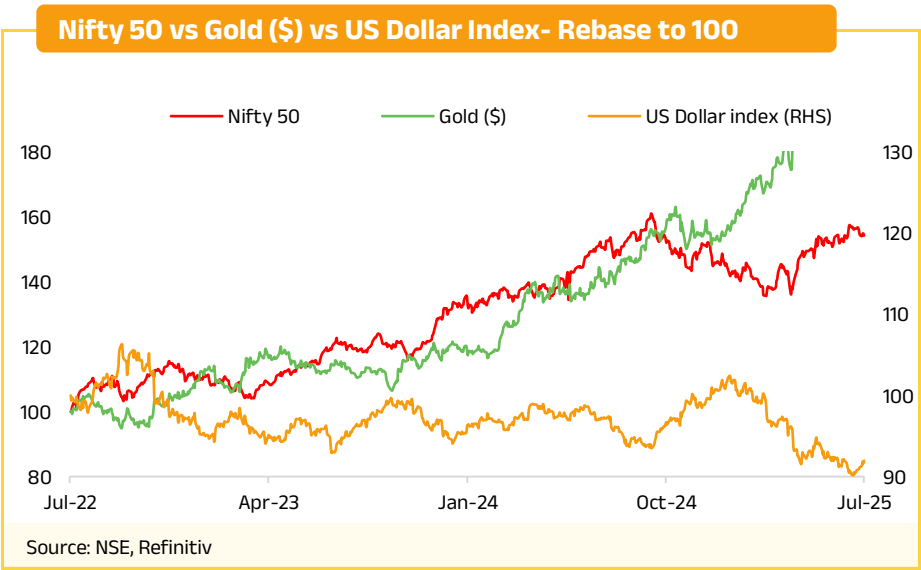
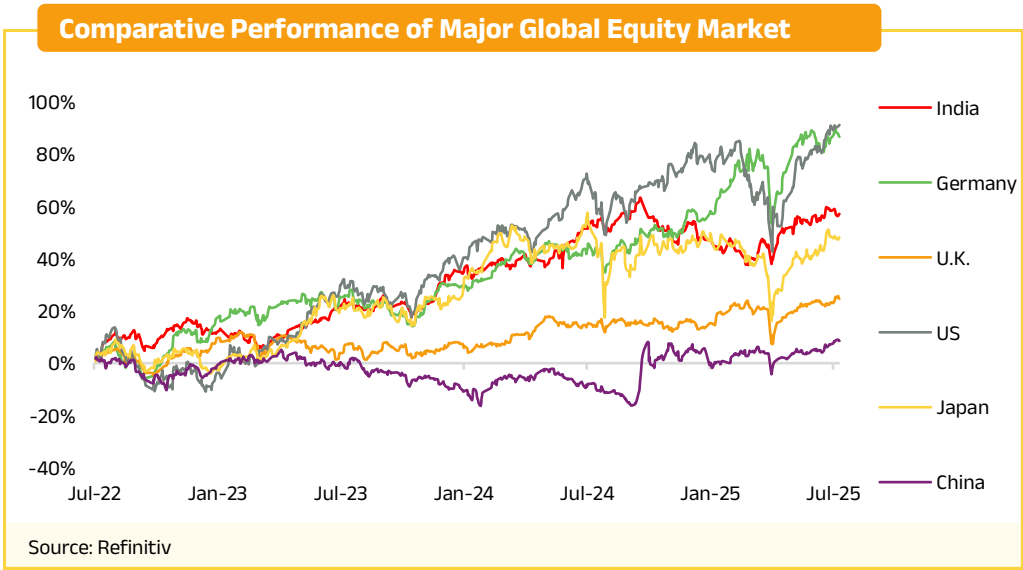
Source: SEBI, NSDL;**As on 15th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25174.60	25245.80	-0.28%
Near Basis	63.15	33.75	87.11%
Mid Futures	25274.80	25348.00	-0.29%
Mid Basis	163.35	135.95	20.15%
Near Open Interest (Cr.)	1.38	1.37	0.68%
Mid Open Interest (Cr.)	0.48	0.47	3.03%
Rollover (%)	27.43	26.96	1.75%
Put Call Ratio (OI)	0.79	0.92	-14.57%
Put Call Ratio(Vol)	1.01	0.82	23.37%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1964	2653	37719
Index Options	855925	858501	317193
Stock Futures	17904	21519	391259
Stock Options	23032	22925	54662
Total	898825	905599	800833
Source: NSE			

Global Equity Market				
Global Indices	17-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3447.87	0.59%	0.29%	5.32%
Nasdaq 100 (U.S.)	23081.05	0.76%	1.10%	6.27%
FTSE (U.K.)	8972.64	0.52%	-0.03%	1.57%
DAX Index (Germany)	24370.93	1.51%	-0.35%	4.00%
CAC 40 Index (France)	7822.00	1.29%	-1.02%	1.80%
SSE Composite (China)	3516.83	0.37%	0.20%	3.82%
Nikkei (Japan)	39901.19	0.60%	0.64%	3.54%
Kospi (South Korea)	3192.29	0.19%	0.28%	8.20%
HangSeng (Hong Kong)	24498.95	-0.08%	1.96%	2.16%
Strait Times (Singapore)	4161.43	0.71%	2.10%	5.87%
Ibovespa Sao Paulo (Brazil)	135564.74	0.04%	-0.86%	-2.36%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8639.00	0.90%	0.58%	1.14%
Jakarta Composite (Indonesia)	7287.02	1.32%	4.02%	1.83%
KLSE (Malaysia)	1520.94	0.62%	-1.01%	0.62%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	17-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,100	-0.10%	0.62%	-1.69%
Gold (\$/oz)	3,338.58	-0.23%	0.48%	-1.47%
Silver (INR/1 kg)	110,844	-0.42%	3.39%	2.36%
Silver (\$/oz)	38.12	0.46%	2.93%	2.32%
Brent Crude(\$/bbl)	72.21	1.73%	-0.06%	-8.32%
Crude Oil (INR/1 bbl)	5,696.00	-0.23%	-2.91%	-7.74%
NYMEX Crude(\$/bbl)	68.66	2.43%	1.45%	-8.96%
Natural Gas (INR/1 mmbtu)	304.70	0.76%	10.48%	-5.49%
Aluminium (INR/1 kg)	248.50	0.20%	-0.40%	1.62%
Copper (INR/1 kg)	880.00	0.09%	-0.78%	-0.17%
Nickel (INR/1 kg)	1,321.20	0.53%	-0.29%	0.85%
Lead (INR/1 kg)	186.85	2.86%	1.74%	-0.61%
Zinc (INR/1 kg)	259.50	0.78%	-0.90%	1.76%
Mentha Oil (INR/1 kg)	935.10	1.66%	0.23%	-1.28%
Baltic Dry Index	2,030	6.51%	38.57%	4.00%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Rights Issue

Definition: A rights issue is a method by which a company raises additional capital by offering existing shareholders the right to purchase additional shares at a discounted price, in proportion to their current holdings.



Explanation

This approach allows companies to strengthen their capital base without taking on debt. Shareholders can either subscribe to the new shares, sell their rights in the market, or let them lapse. For example, if a shareholder owns 100 shares and the company announces a 1:5 rights issue, they can buy 20 more shares at a discounted rate. Rights issues are often used to fund expansion, reduce debt, or meet regulatory requirements.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.61	7.30	1.37	18.09
Mid Cap Fund	2.84	7.57	2.59	25.29
Large & Mid Cap Fund	2.26	7.37	2.77	22.27
Small Cap Fund	4.49	6.33	3.16	25.78
Multi Cap Fund	2.83	7.21	3.16	23.56
Focused Fund	2.08	7.23	2.26	19.60
Value Fund	2.65	6.37	0.28	23.95
Contra Fund	2.82	7.34	2.30	24.76
ELSS	2.48	7.25	1.91	21.24
Equity Savings	0.93	4.46	5.90	10.98
Arbitrage Fund	0.39	3.14	6.61	6.70
Dividend Yield Fund	1.63	5.78	-1.28	23.03
Aggressive Hybrid Fund	1.72	6.69	3.72	17.45
Balanced Advantage	1.39	5.46	3.61	13.86
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.				