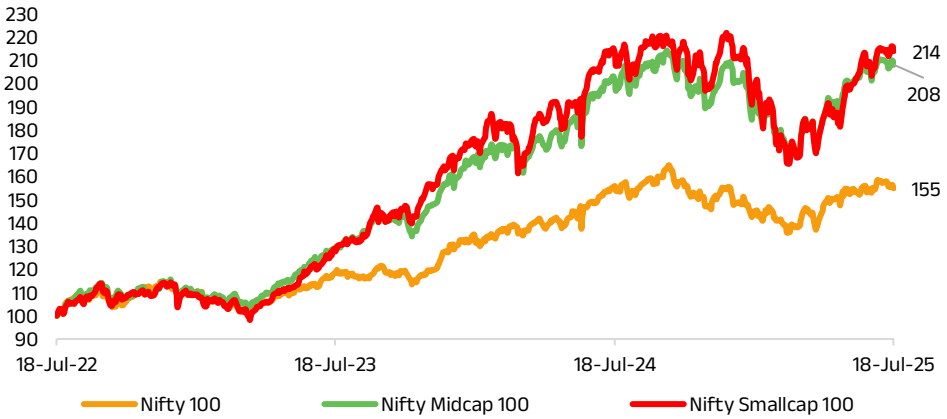


Broad Indices Historical Movement



Source: NSE

Broad Indices

	18-Jul-25	1 Day	1 Week	1 Month
Nifty 50	24,968.40	-0.57%	-0.72%	0.63%
Nifty 100	25,623.50	-0.59%	-0.53%	0.89%
Nifty 200	13,993.45	-0.61%	-0.31%	1.03%
Nifty 500	23,275.15	-0.62%	-0.03%	1.53%
Nifty Large Midcap 250	16,359.95	-0.63%	0.25%	1.60%
Nifty Midcap 150	21,858.85	-0.67%	1.03%	2.34%
Nifty Next 50	68,225.15	-0.71%	0.38%	2.15%
Nifty Smallcap 250	17,909.25	-0.68%	1.50%	4.47%

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

Smart Beta Index

Index	18-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,690.50	-0.67%	-0.74%	-1.73%
NIFTY 500 Value 50	14,309.55	-0.17%	0.89%	3.40%
Nifty 200 Quality 30	20,782.60	-0.53%	-0.12%	0.45%
Nifty 50 Equal Weight	31,445.10	-0.44%	-0.28%	1.14%
NIFTY Alpha Low Volatility 30	26,607.30	-0.68%	-0.55%	0.02%
Nifty High Beta 50	3,821.70	-0.77%	0.58%	3.06%
Nifty Low Volatility 50	25,016.00	-0.72%	-0.52%	0.78%
Nifty Midcap150 Momentum 50	61,923.10	-0.85%	0.10%	-0.63%
Nifty PSE	9,962.25	-0.74%	-0.83%	1.15%
Nifty SME Emerge	15,233.69	-0.01%	1.49%	4.63%
Nifty 100 ESG	4,913.90	-0.63%	-0.48%	0.88%

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

Sector Indices

Index	18-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,894.35	-0.45%	1.70%	2.50%
Nifty Bank	56,283.00	-0.96%	-0.83%	0.81%
Nifty Consumption	11,699.15	-0.62%	0.67%	2.26%
Nifty Financial	26,556.15	-0.94%	-1.11%	0.59%
Nifty FMCG	56,506.90	-0.59%	1.07%	3.77%
Nifty Healthcare	14,668.30	-0.65%	1.41%	4.36%
Nifty IT	37,141.85	0.01%	-1.46%	-4.84%
Nifty Media	1,771.05	0.96%	3.92%	4.09%
Nifty Metal	9,458.20	0.37%	0.80%	3.28%
Nifty MNC	29,137.65	-0.40%	0.68%	3.08%
Nifty Pharma	22,592.75	-0.39%	1.65%	4.65%
Nifty Realty	999.90	-0.12%	3.84%	-0.89%
Nifty Energy	36,231.65	-0.57%	0.37%	1.58%

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

Nifty 50 Top 5 Gainers

Company	18-Jul-25	Prev_Day	% Change	1 Week
Wipro	266.95	260.60	2.44	3.35
ONGC	246.31	243.87	1.00	1.88
Coal India	388.50	385.90	0.67	1.98
IndusInd Bank	870.05	865.10	0.57	1.30
ICICI Bank	1,425.80	1,418.70	0.50	0.27

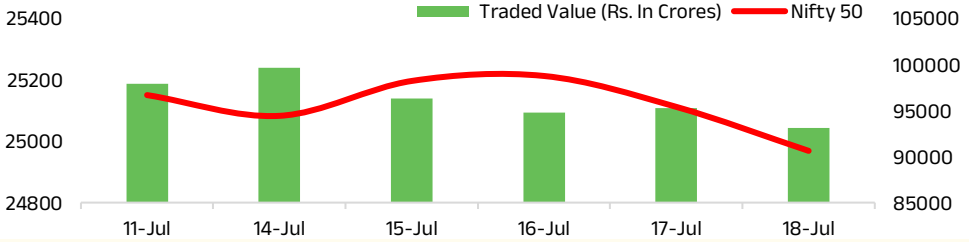
Source: NSE

Nifty 50 Top 5 Losers

Company	18-Jul-25	Prev_Day	% Change	1 Week
Axis Bank	1,099.30	1160	-5.22	-6.35
HDFC Standard Life Insu	739.50	752	-1.64	-2.57
Bharti Airtel	1,901.00	1930	-1.50	-1.09
HDFC Bank	1,957.40	1987	-1.48	-1.33
Kotak Bank	2,140.50	2171	-1.40	-3.61

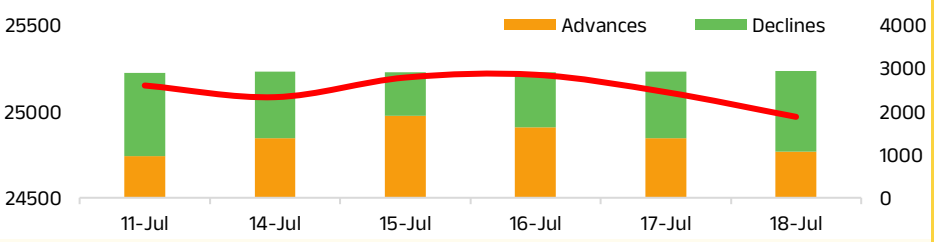
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

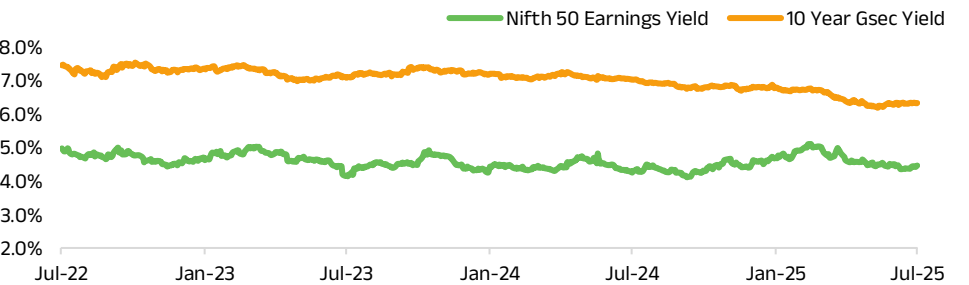
Indian equity markets closed in negative territory for the second consecutive session as investors continued to trim their exposure to equities amid unimpressive Q1FY26 earnings and ongoing tariff-related uncertainties. A broad-based sell-off was seen across the markets, driven by disappointing initial results from the finance and IT sectors, while significant net short positions held by Foreign Institutional Investors added to the cautious sentiment.

Reliance Retail announced that it has acquired home appliance maker Kelvinator from Sweden's Electrolux for the Indian market, aiming to "significantly broaden" its presence in the consumer durables sector.

Tata Power Renewable Energy Ltd (TPREL) has secured a 30 MW / 120 MWh battery energy storage project from state-owned NHPC. The project was awarded under NHPC's BESS Tranche-I tender through a competitive bidding process for Kerala State Electricity Board Ltd.

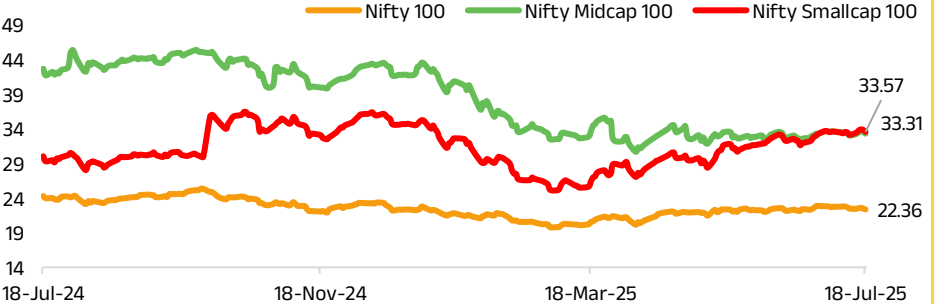
Hindustan Zinc reported a consolidated net profit of Rs. 2,234 crore for the first quarter ended Jun 2025, marking a 4.7% YoY decline from Rs. 2,345 crore in the same quarter last year. Revenue also saw a fall of 4.4%. Lower volumes and commodity prices impacted the earnings.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



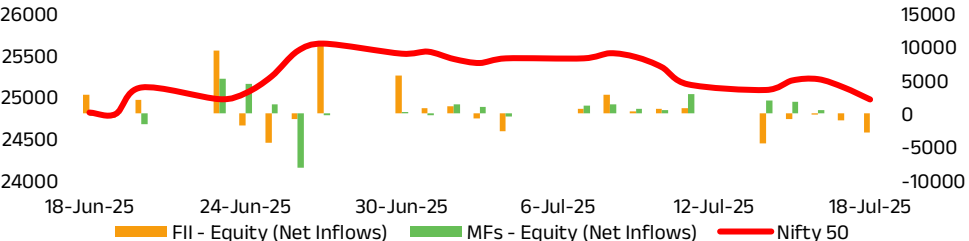
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-2864.12	-5,524	-5,524	-83,424
MF**	471.3	12,419	12,419	245,471
DII	2103.51	21,894	21,894	370,369

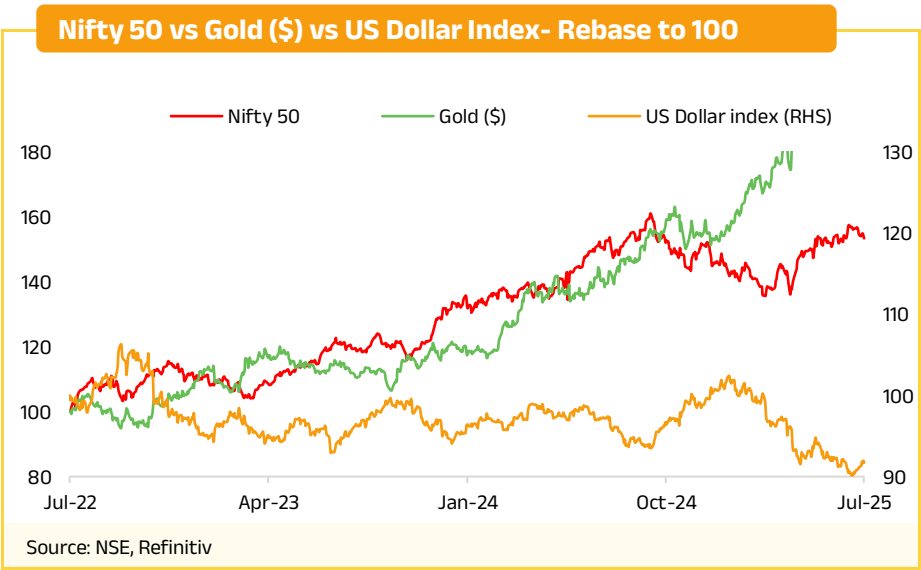
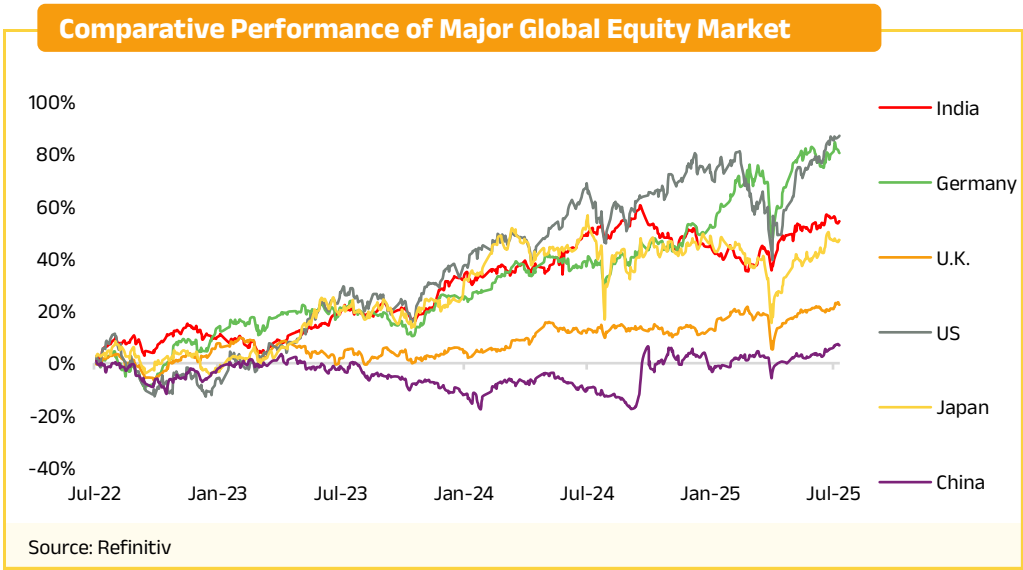
Source: SEBI, NSDL;\*\*As on 16th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25032.30	25174.60	-0.57%
Near Basis	63.90	63.15	1.19%
Mid Futures	25137.40	25274.80	-0.54%
Mid Basis	169.00	163.35	3.46%
Near Open Interest (Cr.)	1.37	1.38	-0.63%
Mid Open Interest (Cr.)	0.50	0.48	5.08%
Rollover (%)	28.58	27.43	4.22%
Put Call Ratio (OI)	0.78	0.79	-0.42%
Put Call Ratio(Vol)	1.05	1.01	3.46%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1921	3913	38824
Index Options	1704150	1685764	243414
Stock Futures	19138	20627	390828
Stock Options	21027	21284	55201
Total	1746236	1731588	728266
Source: NSE			

Global Equity Market				
Global Indices	18-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3448.17	0.01%	0.69%	5.33%
Nasdaq 100 (U.S.)	23065.47	-0.07%	1.25%	6.20%
FTSE (U.K.)	8992.12	0.22%	0.57%	1.68%
DAX Index (Germany)	24289.51	-0.33%	0.14%	4.17%
CAC 40 Index (France)	7822.67	0.01%	-0.08%	2.18%
SSE Composite (China)	3534.48	0.50%	0.69%	4.30%
Nikkei (Japan)	39819.11	-0.21%	0.63%	2.40%
Kospi (South Korea)	3188.07	-0.13%	0.39%	7.26%
HangSeng (Hong Kong)	24825.66	1.33%	2.84%	4.70%
Strait Times (Singapore)	4189.50	0.67%	2.49%	6.85%
Ibovespa Sao Paulo (Brazil)	133381.58	-1.61%	-2.06%	-3.85%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8757.20	1.37%	2.06%	2.65%
Jakarta Composite (Indonesia)	7311.91	0.34%	3.75%	2.87%
KLSE (Malaysia)	1525.86	0.32%	-0.66%	0.92%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	18-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,800	0.72%	0.73%	-1.14%
Gold (\$/oz)	3,349.26	0.32%	-0.19%	-0.58%
Silver (INR/1 kg)	112,616	1.60%	2.14%	3.15%
Silver (\$/oz)	38.17	0.14%	-0.51%	3.90%
Brent Crude(\$/bbl)	71.89	-0.44%	-2.24%	-8.86%
Crude Oil (INR/1 bbl)	5,803.00	1.88%	1.86%	-9.95%
NYMEX Crude(\$/bbl)	68.43	-0.33%	-1.58%	-9.59%
Natural Gas (INR/1 mmbtu)	304.30	-0.13%	6.55%	-8.23%
Aluminium (INR/1 kg)	249.35	0.34%	-0.32%	1.20%
Copper (INR/1 kg)	890.00	1.14%	0.72%	0.51%
Nickel (INR/1 kg)	1,318.30	-0.22%	-0.32%	0.40%
Lead (INR/1 kg)	183.35	-1.87%	0.22%	-1.16%
Zinc (INR/1 kg)	267.25	2.99%	2.30%	4.56%
Mentha Oil (INR/1 kg)	929.70	-0.58%	-0.17%	-1.38%
Baltic Dry Index	2,052	1.08%	23.39%	9.50%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Dividend Yield

Definition: Dividend yield is a financial ratio that shows how much a company pays out in dividends each year relative to its share price.



Explanation

It is calculated as Dividend per Share ÷ Market Price per Share, expressed as a percentage. A higher dividend yield may indicate a stable income-generating stock, while a lower yield could suggest growth-oriented companies that reinvest earnings. For example, if a company pays ₹10 in annual dividends and its share price is ₹200, the dividend yield is 5%. Investors use this metric to assess income potential and compare stocks within the same sector.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.17	6.67	0.42	17.37
Mid Cap Fund	2.53	6.97	2.85	24.54
Large & Mid Cap Fund	1.87	6.74	2.51	21.52
Small Cap Fund	4.05	5.69	3.33	25.10
Multi Cap Fund	2.45	6.59	3.00	22.81
Focused Fund	1.59	6.54	1.70	18.81
Value Fund	2.30	5.75	-0.26	23.14
Contra Fund	2.37	6.74	1.69	24.00
ELSS	2.07	6.62	1.56	20.49
Equity Savings	0.86	4.31	5.72	10.78
Arbitrage Fund	0.45	3.18	6.64	6.73
Dividend Yield Fund	1.50	5.31	-1.58	22.31
Aggressive Hybrid Fund	1.43	6.25	3.33	16.90
Balanced Advantage	1.21	5.13	3.20	13.48
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.				