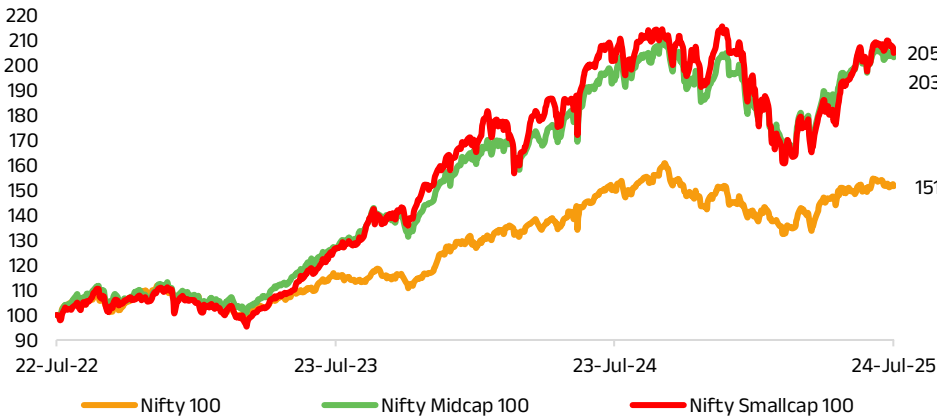


Broad Indices Historical Movement



Source: NSE

Broad Indices

	24-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,062.10	-0.63%	-0.20%	0.07%
Nifty 100	25,701.90	-0.56%	-0.29%	0.27%
Nifty 200	14,023.00	-0.56%	-0.40%	0.33%
Nifty 500	23,301.10	-0.54%	-0.51%	0.81%
Nifty Large Midcap 250	16,383.75	-0.49%	-0.49%	0.90%
Nifty Midcap 150	21,856.15	-0.42%	-0.68%	1.55%
Nifty Next 50	68,207.30	-0.23%	-0.73%	1.27%
Nifty Smallcap 250	17,734.70	-0.66%	-1.65%	3.23%

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

Smart Beta Index

Index	24-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,911.55	-0.92%	0.04%	-2.00%
NIFTY 500 Value 50	14,353.55	-0.08%	0.14%	2.78%
Nifty 200 Quality 30	20,474.55	-1.37%	-2.00%	-1.15%
Nifty 50 Equal Weight	31,447.65	-0.54%	-0.43%	-0.01%
NIFTY Alpha Low Volatility 30	26,597.80	-0.61%	-0.71%	-0.58%
Nifty High Beta 50	3,801.75	-0.23%	-1.29%	0.88%
Nifty Low Volatility 50	24,859.70	-0.66%	-1.34%	-0.46%
Nifty Midcap150 Momentum 50	62,396.35	-0.51%	-0.10%	-0.97%
Nifty PSE	9,988.90	-0.39%	-0.48%	0.77%
Nifty SME Emerge	15,150.54	-0.07%	-0.55%	3.75%
Nifty 100 ESG	4,954.25	-0.41%	0.19%	0.82%

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

Sector Indices

Index	24-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	24,087.30	0.03%	0.35%	2.07%
Nifty Bank	57,066.05	-0.25%	0.42%	1.07%
Nifty Consumption	11,781.55	-0.49%	0.08%	1.42%
Nifty Financial	27,046.30	-0.62%	0.88%	1.11%
Nifty FMCG	55,085.85	-1.12%	-3.09%	1.36%
Nifty Healthcare	14,744.50	0.65%	-0.13%	4.40%
Nifty IT	36,135.80	-2.21%	-2.70%	-5.94%
Nifty Media	1,714.35	-0.17%	-2.27%	-0.84%
Nifty Metal	9,582.30	0.03%	1.69%	3.13%
Nifty MNC	28,998.65	-0.96%	-0.88%	2.55%
Nifty Pharma	22,541.05	0.55%	-0.61%	4.01%
Nifty Realty	960.10	-1.04%	-4.10%	-5.34%
Nifty Energy	36,048.35	-0.70%	-1.07%	0.90%

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

Nifty 50 Top 5 Gainers

Company	24-Jul-25	Prev_Day	% Change	1 Week
Tata Motors	700.50	690.10	1.51	2.76
Grasim Indus	2,735.90	2,709.10	0.99	-1.10
Cipla	1,487.90	1,473.50	0.98	0.37
Tata Beverages	1,072.80	1,062.60	0.96	-2.98
Sun Pharma	1,692.00	1,682.50	0.56	-0.67

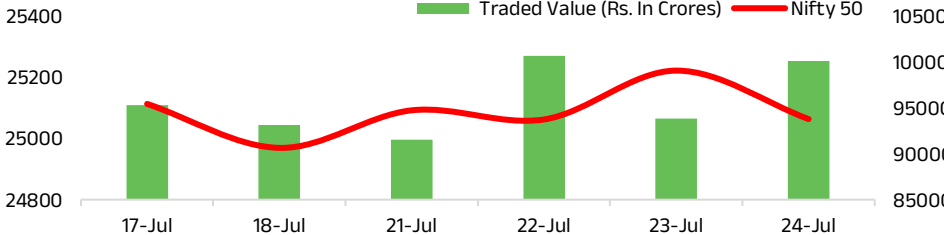
Source: NSE

Nifty 50 Top 5 Losers

Company	24-Jul-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,498.60	1547	-3.10	-4.16
RIL	1,402.90	1425	-1.52	-4.98
HCL Tech	1,507.20	1530	-1.48	-2.38
Hero Moto	4,301.90	4364	-1.42	-3.19
Infosys	1,552.50	1575	-1.40	-1.96

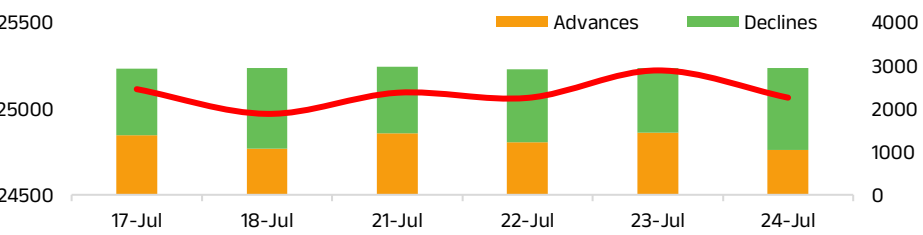
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

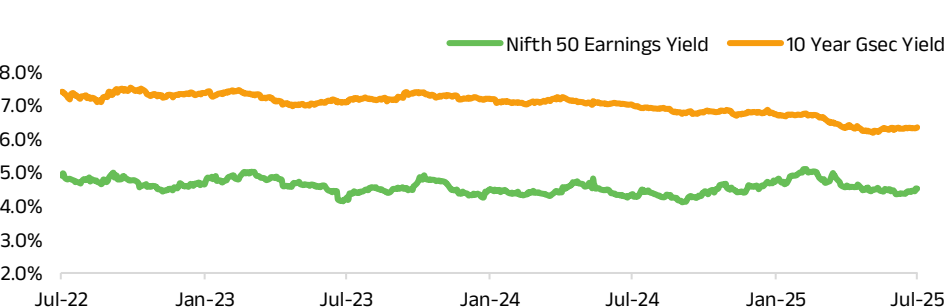
Indian equity markets fell as investors grew cautious over the stalled India-U.S. trade deal, weak corporate earnings, and foreign portfolio outflows. Uncertainty around a proposed 26% tariff and stalled U.S. demands for agricultural access clouded outlook ahead of the Aug 1 deadline. Losses were partly offset by optimism over the India-U.K. free trade pact, promising tariff relief and improved bilateral market access.

Adani Energy Solutions reported a consolidated net profit of Rs. 512.48 crore for Q1 FY26, recovering from a loss of Rs. 823.92 crore in the same period last year. However, the profit declined 20.8% sequentially from Rs. 647.15 crore in Q4 FY25.

Nestlé India posted a 13.3% drop in net profit to Rs. 647 crore in Q1 FY26, driven by higher operational costs due to expansion. This marks the second consecutive quarter of profit decline, compared to Rs. 746.6 crore in Q1 FY25.

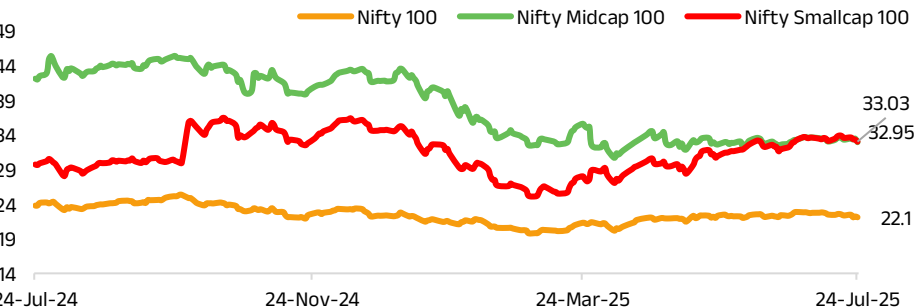
ACC Ltd reported a 4.35% increase in consolidated net profit to Rs. 375.42 crore for the June 2025 quarter, supported by volume gains and operational efficiencies.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



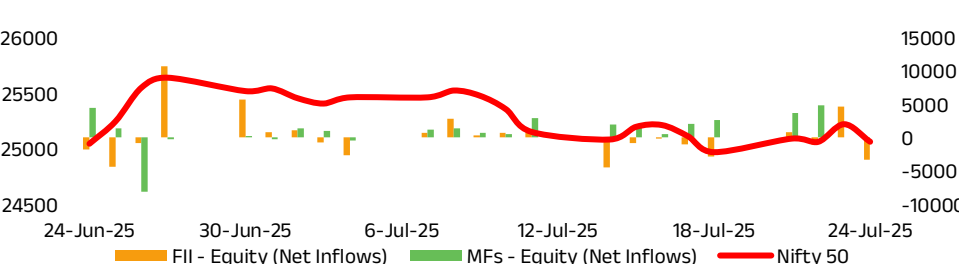
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	-3299.28	-4,508	-4,508	-82,408
MF**	4783.8	25,561	25,561	258,613
DII	2617.14	37,687	37,687	386,163

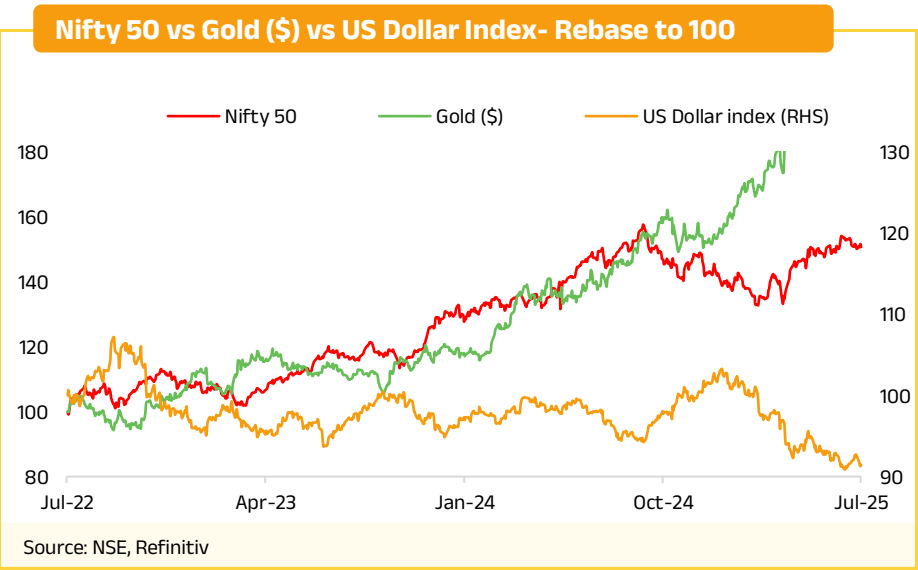
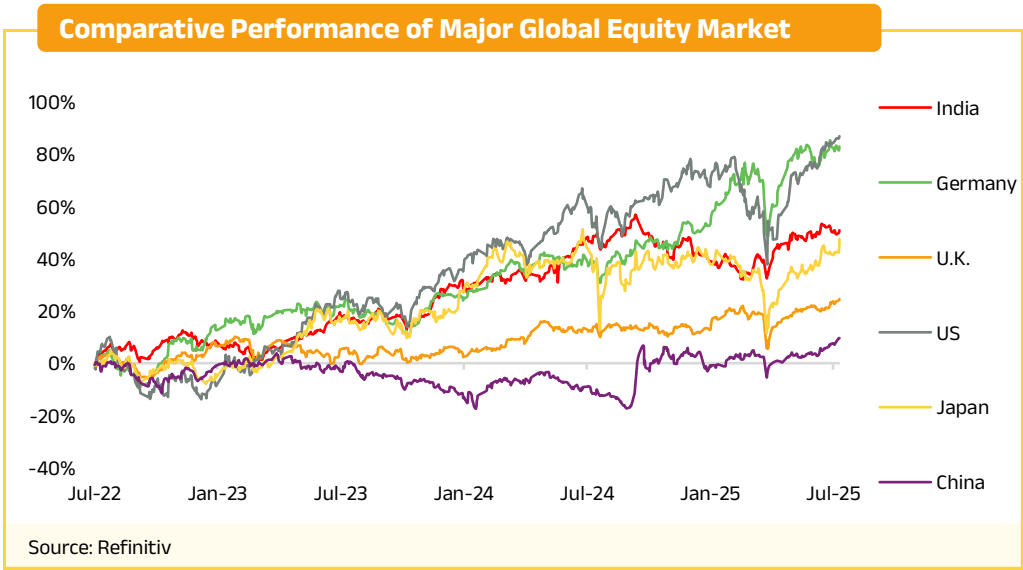
Source: SEBI, NSDL;**As on 22nd Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25095.40	25252.80	-0.62%
Near Basis	33.30	32.90	1.22%
Mid Futures	25195.00	25354.20	-0.63%
Mid Basis	132.90	134.30	-1.04%
Near Open Interest (Cr.)	1.24	1.28	-3.09%
Mid Open Interest (Cr.)	0.65	0.55	16.87%
Rollover (%)	36.19	32.14	12.61%
Put Call Ratio (OI)	0.80	1.14	-30.46%
Put Call Ratio(Vol)	1.06	0.83	27.78%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2438	1680	40091
Index Options	986843	991691	348573
Stock Futures	21153	19892	389331
Stock Options	30998	30837	59158
Total	1041432	1044100	837154
Source: NSE			

Global Equity Market				
Global Indices	24-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3481.50	0.01%	0.98%	4.39%
Nasdaq 100 (U.S.)	23219.87	0.25%	0.60%	4.64%
FTSE (U.K.)	9138.37	0.85%	1.85%	4.33%
DAX Index (Germany)	24295.93	0.23%	-0.31%	2.77%
CAC 40 Index (France)	7818.28	-0.41%	-0.05%	2.66%
SSE Composite (China)	3605.73	0.65%	2.53%	5.41%
Nikkei (Japan)	41826.34	1.59%	4.82%	7.83%
Kospi (South Korea)	3190.45	0.21%	-0.06%	2.80%
HangSeng (Hong Kong)	25667.18	0.51%	4.77%	6.16%
Strait Times (Singapore)	4273.05	0.99%	2.68%	9.44%
Ibovespa Sao Paulo (Brazil)	133807.59	-1.15%	-1.30%	-2.45%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8709.40	-0.32%	0.81%	1.80%
Jakarta Composite (Indonesia)	7530.90	0.83%	3.35%	9.63%
KLSE (Malaysia)	1540.32	0.69%	1.27%	1.72%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	24-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,442	-1.69%	1.38%	1.72%
Gold (\$/oz)	3,367.81	-0.58%	0.88%	1.33%
Silver (INR/1 kg)	114,832	-0.84%	3.60%	8.34%
Silver (\$/oz)	39.08	-0.51%	2.53%	8.85%
Brent Crude(\$/bbl)	69.96	0.00%	-3.12%	-3.44%
Crude Oil (INR/1 bbl)	5,635.00	0.02%	-1.07%	-5.25%
NYMEX Crude(\$/bbl)	67.06	1.68%	-2.33%	2.62%
Natural Gas (INR/1 mmbtu)	265.80	-5.24%	-12.77%	-17.20%
Aluminium (INR/1 kg)	254.90	0.16%	2.58%	2.47%
Copper (INR/1 kg)	905.00	0.17%	2.84%	2.30%
Nickel (INR/1 kg)	1,353.40	0.50%	2.44%	3.12%
Lead (INR/1 kg)	188.00	1.59%	0.62%	1.70%
Zinc (INR/1 kg)	273.00	0.18%	5.20%	5.69%
Mentha Oil (INR/1 kg)	943.10	0.33%	0.86%	0.61%
Baltic Dry Index	2,258	6.51%	11.23%	34.32%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Beta Coefficient

Definition: Beta measures a **stock’s** volatility relative to the overall market. A beta of 1 means the stock moves in line with the market; greater than 1 indicates higher volatility, and less than 1 suggests lower volatililit



Explanation

Beta helps investors understand how a stock might react to market movements. High-beta stocks may offer higher returns but come with greater risk, while low-beta stocks are more stable. Portfolio managers use beta to balance risk, optimize asset allocation, and evaluate how individual securities contribute to overall portfolio volatility under different market conditions.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.56	8.60	2.01	16.53
Mid Cap Fund	1.68	10.16	3.28	23.54
Large & Mid Cap Fund	1.37	9.77	3.69	20.65
Small Cap Fund	3.37	9.60	2.62	23.89
Multi Cap Fund	1.83	9.47	3.65	21.82
Focused Fund	1.14	9.20	3.08	18.10
Value Fund	1.60	7.98	0.46	22.04
Contra Fund	1.75	8.78	2.66	22.96
ELSS	1.56	9.17	2.58	19.60
Equity Savings	0.78	4.99	6.07	10.46
Arbitrage Fund	0.48	3.10	6.56	6.70
Dividend Yield Fund	1.08	6.83	-0.99	21.32
Aggressive Hybrid Fund	1.13	8.12	4.32	16.26
Balanced Advantage	0.92	6.39	3.90	12.98
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.				

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