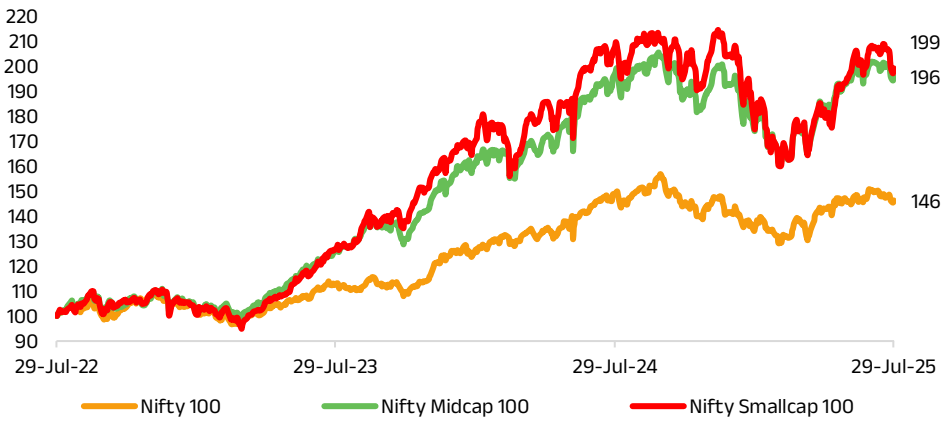


Broad Indices Historical Movement



Source: NSE

Broad Indices

	29-Jul-25	1 Day	1 Week	1 Month
Nifty 50	24,821.10	0.57%	-0.96%	-3.19%
Nifty 100	25,443.65	0.63%	-1.01%	-2.97%
Nifty 200	13,866.45	0.66%	-1.16%	-2.87%
Nifty 500	23,007.35	0.70%	-1.34%	-2.59%
Nifty Large Midcap 250	16,167.95	0.75%	-1.38%	-2.27%
Nifty Midcap 150	21,501.00	0.87%	-1.75%	-1.55%
Nifty Next 50	67,379.20	0.91%	-1.28%	-1.94%
Nifty Smallcap 250	17,319.05	0.91%	-2.86%	-1.83%

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

Smart Beta Index

Index	29-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,350.00	0.11%	-2.31%	-4.72%
NIFTY 500 Value 50	14,086.15	0.82%	-1.39%	-1.53%
Nifty 200 Quality 30	20,196.75	0.44%	-2.67%	-3.90%
Nifty 50 Equal Weight	31,104.55	0.57%	-1.14%	-3.18%
NIFTY Alpha Low Volatility 30	26,428.35	0.49%	-0.80%	-3.02%
Nifty High Beta 50	3,703.65	1.07%	-2.49%	-3.50%
Nifty Low Volatility 50	24,729.00	0.52%	-0.92%	-2.89%
Nifty Midcap150 Momentum 50	61,296.20	0.61%	-1.78%	-3.54%
Nifty PSE	9,779.10	0.68%	-2.09%	-2.97%
Nifty SME Emerge	15,101.18	0.40%	-0.66%	2.86%
Nifty 100 ESG	4,901.60	0.55%	-0.93%	-2.38%

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

Sector Indices

Index	29-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,888.35	0.82%	0.05%	-0.50%
Nifty Bank	56,222.00	0.24%	-0.94%	-2.13%
Nifty Consumption	11,676.60	0.56%	-1.06%	-1.63%
Nifty Financial	26,700.70	0.32%	-1.07%	-2.35%
Nifty FMCG	54,891.15	0.29%	-1.99%	-0.40%
Nifty Healthcare	15,047.70	1.26%	3.57%	4.41%
Nifty IT	35,373.25	0.01%	-4.03%	-8.89%
Nifty Media	1,637.75	0.82%	-5.53%	-6.30%
Nifty Metal	9,409.70	1.00%	-1.30%	-1.76%
Nifty MNC	28,673.40	0.83%	-1.93%	-0.64%
Nifty Pharma	23,072.45	1.37%	3.43%	5.22%
Nifty Realty	926.50	1.60%	-6.98%	-6.79%
Nifty Energy	35,410.70	1.11%	-2.18%	-3.10%

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

Nifty 50 Top 5 Gainers

Company	29-Jul-25	Prev_Day	% Change	1 Week
L&T Ltd.	3,495.60	3,422.20	2.14	0.89
RIL	1,417.10	1,387.60	2.13	0.30
Asian Paints	2,401.50	2,359.60	1.78	1.53
Eicher Motors Limited	5,470.50	5,386.00	1.57	0.57
Bharti Airtel	1,918.30	1,890.30	1.48	0.60

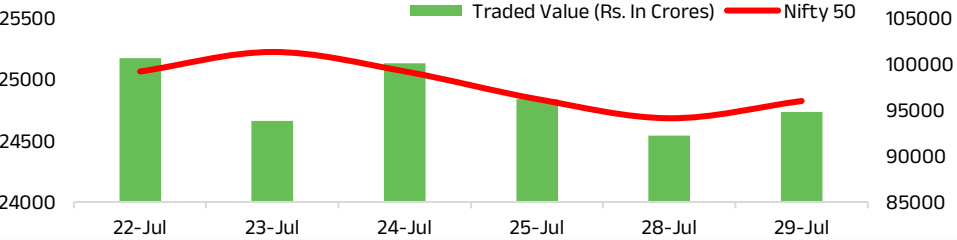
Source: NSE

Nifty 50 Top 5 Losers

Company	29-Jul-25	Prev_Day	% Change	1 Week
Shree Cements Limited	30,410.00	30695	-0.93	-5.98
SBI Life Insurance Comp	1,833.40	1851	-0.92	1.35
Axis Bank	1,064.20	1074	-0.88	-3.08
TCS	3,056.00	3079	-0.76	-3.28
HDFC Standard Life Insu	756.35	761	-0.64	-0.91

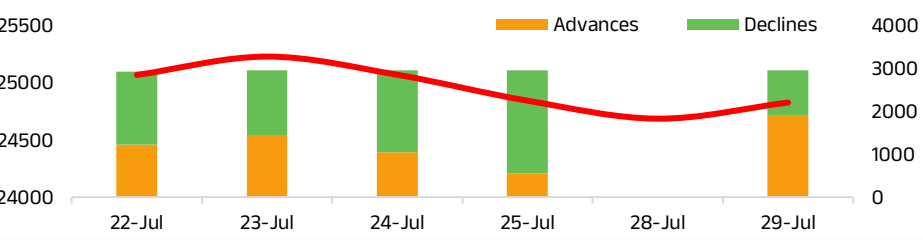
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

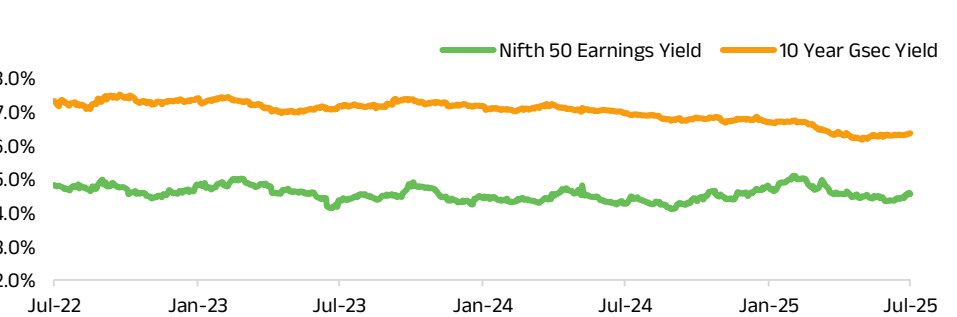
 Indian equity markets rebounded after a three-day losing streak, driven by value buying across sectors following the recent sell-off. However, investor sentiment remains cautious ahead of key global events, including the US Federal Reserve's upcoming policy decision and the Aug 1, 2025 deadline for reciprocal tariffs.

 Varun Beverages has announced its results for the first quarter ended Jun 2025, reporting a 5% YoY increase in profit after tax (PAT) to Rs. 1,325.49 crore, up from Rs. 1,261.83 crore in the same period last year. However, revenue from operations declined by 2.3% YoY.

 Mazagon Dock Shipbuilders reported a 35% YoY decline in consolidated net profit for the Jun quarter of 2025, at Rs. 452 crore compared to Rs. 696 crore in Q1FY25. The decline in profit comes despite a steady increase in revenue and strong operating performance.

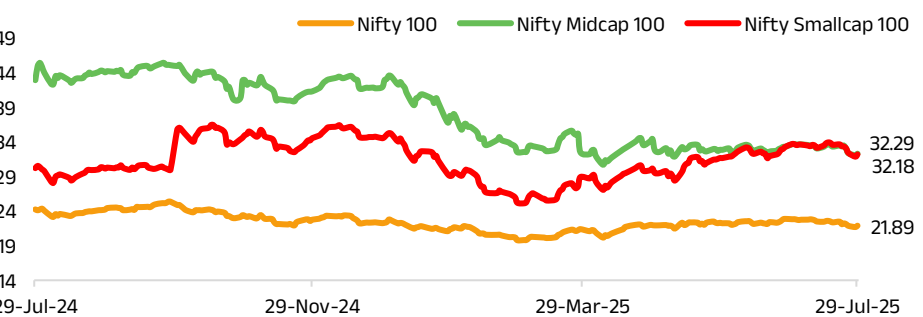
 Larsen & Toubro (L&T) has secured an ultra-mega order for its hydrocarbon offshore business from a client in the Middle East.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



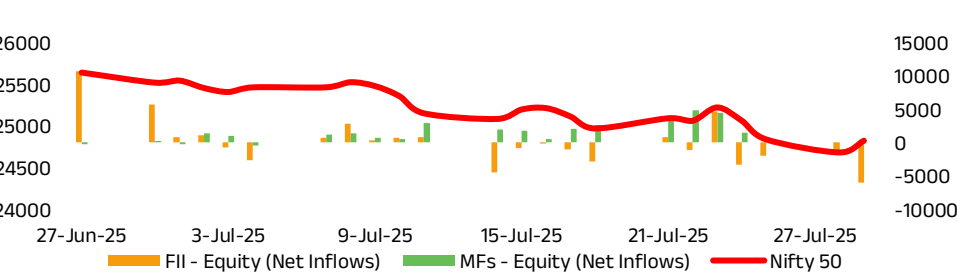
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-5963.6	-13,886	-13,886	-91,786
MF**	1502.02	31,468	31,468	264,520
DII	6146.82	52,737	52,737	401,213

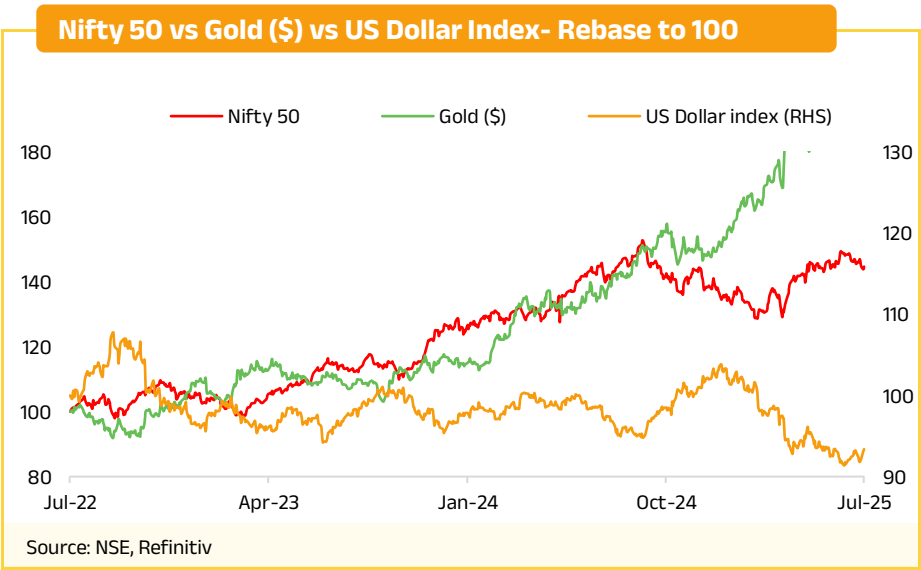
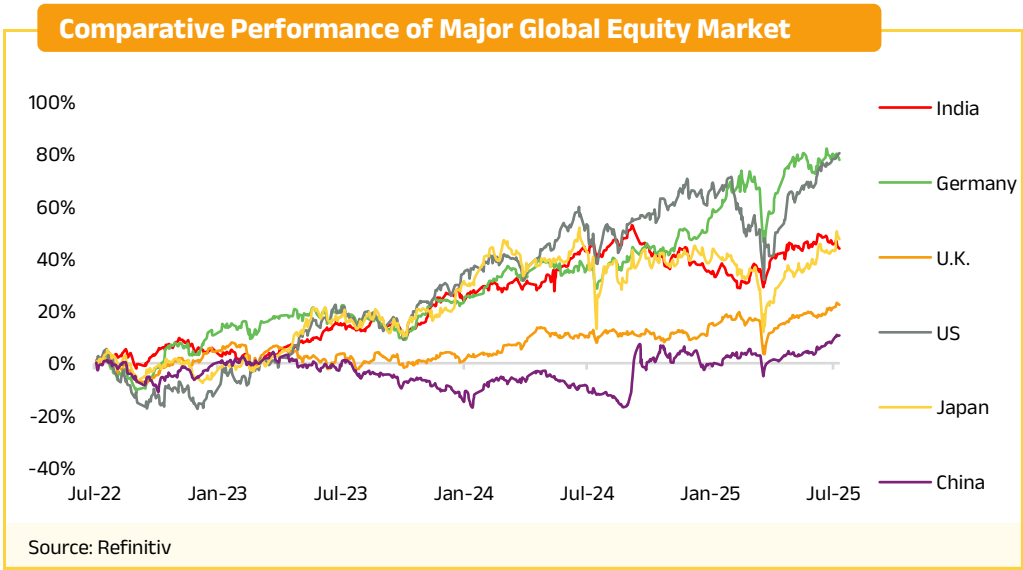
Source: SEBI, NSDL;**As on 24th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24838.80	24710.20	0.52%
Near Basis	17.70	29.30	-39.59%
Mid Futures	24934.70	24808.00	0.51%
Mid Basis	113.60	127.10	-10.62%
Near Open Interest (Cr.)	0.91	1.12	-18.46%
Mid Open Interest (Cr.)	1.03	0.86	19.88%
Rollover (%)	54.56	45.13	20.90%
Put Call Ratio (OI)	0.80	0.64	26.56%
Put Call Ratio(Vol)	0.84	0.96	-12.57%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	5351	6529	43515
Index Options	1376051	1384439	404531
Stock Futures	142892	140768	378097
Stock Options	33988	33638	55677
Total	1558281	1565375	881820
Source: NSE			

Global Equity Market				
Global Indices	29-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3485.33	-0.33%	0.89%	3.18%
Nasdaq 100 (U.S.)	23308.30	-0.21%	1.06%	3.44%
FTSE (U.K.)	9136.32	0.60%	1.25%	3.83%
DAX Index (Germany)	24217.37	1.03%	0.73%	0.77%
CAC 40 Index (France)	7857.36	0.72%	1.46%	2.16%
SSE Composite (China)	3609.71	0.33%	0.78%	5.42%
Nikkei (Japan)	40674.55	-0.79%	2.26%	1.30%
Kospi (South Korea)	3230.57	0.66%	1.91%	5.71%
HangSeng (Hong Kong)	25524.45	-0.15%	1.57%	5.11%
Strait Times (Singapore)	4229.41	-0.28%	0.50%	6.64%
Ibovespa Sao Paulo (Brazil)	132725.68	0.45%	-0.98%	-3.02%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8704.60	0.08%	0.32%	2.24%
Jakarta Composite (Indonesia)	7617.91	0.04%	3.72%	10.45%
KLSE (Malaysia)	1523.82	-0.36%	0.29%	-0.28%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	29-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,912	-0.13%	-1.12%	2.64%
Gold (\$/oz)	3,326.31	0.37%	-3.05%	1.63%
Silver (INR/1 kg)	113,219	0.34%	-0.86%	8.01%
Silver (\$/oz)	38.20	0.08%	-2.76%	6.16%
Brent Crude(\$/bbl)	73.13	2.02%	1.78%	3.01%
Crude Oil (INR/1 bbl)	5,774.00	2.41%	-0.35%	3.20%
NYMEX Crude(\$/bbl)	70.17	3.63%	4.02%	5.42%
Natural Gas (INR/1 mmbtu)	258.60	-3.90%	-9.80%	-14.48%
Aluminium (INR/1 kg)	254.15	-0.53%	0.02%	2.50%
Copper (INR/1 kg)	899.10	0.57%	1.10%	0.51%
Nickel (INR/1 kg)	1,333.50	-0.30%	-0.72%	0.41%
Lead (INR/1 kg)	184.00	-0.81%	0.63%	-1.18%
Zinc (INR/1 kg)	270.00	0.47%	-0.09%	3.09%
Mentha Oil (INR/1 kg)	957.20	1.07%	1.82%	2.59%
Baltic Dry Index	2,109	-5.26%	3.64%	38.66%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Accrual vs. Cash Accounting

Definition: Accrual accounting records revenues and expenses when they are incurred, regardless of when cash is exchanged. Cash accounting records transactions only when cash changes hands.



Explanation

Accrual accounting provides a more accurate picture of a company's financial position, especially for long-term planning. Cash accounting is simpler and often used by small businesses for short-term financial tracking.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-2.54	7.45	-0.78	15.40
Mid Cap Fund	-1.26	9.89	-0.28	22.37
Large & Mid Cap Fund	-1.91	8.92	0.19	19.42
Small Cap Fund	-0.37	9.35	-0.94	22.72
Multi Cap Fund	-1.44	8.82	0.42	20.57
Focused Fund	-1.95	7.96	0.02	16.92
Value Fund	-1.68	7.37	-2.60	20.92
Contra Fund	-1.77	7.57	-0.84	21.79
ELSS	-1.76	8.39	-0.42	18.37
Equity Savings	-0.24	4.74	5.05	10.12
Arbitrage Fund	0.43	3.08	6.56	6.76
Dividend Yield Fund	-2.25	6.03	-4.53	19.94
Aggressive Hybrid Fund	-1.38	7.49	1.84	15.40
Balanced Advantage	-0.96	5.85	2.08	12.30
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.				