# Daily Equity Market Pulse - July 31, 2025





Broad Indices				
	30-Jul-25	1 Day	1 Week	1 Month
Nifty 50	24,855.05	0.14%	-1.45%	-2.59%
Nifty 100	25,476.05	0.13%	-1.43%	-2.54%
Nifty 200	13,879.35	0.09%	-1.58%	-2.62%
Nifty 500	23,033.55	0.11%	-1.69%	-2.47%
Nifty Large Midcap 250	16,193.05	0.16%	-1.65%	-2.29%
Nifty Midcap 150	21,540.25	0.18%	-1.86%	-2.04%
Nifty Next 50	67,435.15	0.08%	-1.36%	-2.27%
Nifty Smallcap 250	17,301.05	-0.10%	-3.09%	-2.79%
Source: NSE; Positive returns inc	dicates green coloui	r, unchanged is yell	ow and negative i	returns is rose.

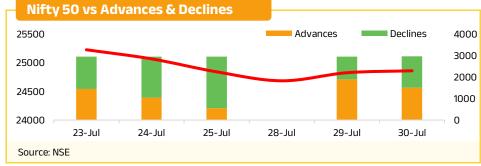
NIFTY 500 Value 50	Index	30-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Quality 30 20,245.45 0.24% -2.47% -3.71%   Nifty 50 Equal Weight 31,088.95 -0.05% -1.67% -3.01%   NIFTY Alpha Low Volatility 30 26,464.90 0.14% -1.11% -2.66%   Nifty High Beta 50 3,687.05 -0.45% -3.24% -4.71%   Nifty Low Volatility 50 24,807.50 0.32% -0.87% -2.26%   Nifty Midcap150 Momentum 50 61,605.80 0.51% -1.77% -3.71%   Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	Nifty 200 Momentum 30 Index	30,306.85	-0.14%	-2.86%	-5.00%
Nifty 50 Equal Weight 31,088.95 -0.05% -1.67% -3.01%   NIFTY Alpha Low Volatility 30 26,464.90 0.14% -1.11% -2.66%   Nifty High Beta 50 3,687.05 -0.45% -3.24% -4.71%   Nifty Low Volatility 50 24,807.50 0.32% -0.87% -2.26%   Nifty Midcap150 Momentum 50 61,605.80 0.51% -1.77% -3.71%   Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	NIFTY 500 Value 50	14,005.50	-0.57%	-2.50%	-2.51%
NIFTY Alpha Low Volatility 30 26,464.90 0.14% -1.11% -2.66%   Nifty High Beta 50 3,687.05 -0.45% -3.24% -4.71%   Nifty Low Volatility 50 24,807.50 0.32% -0.87% -2.26%   Nifty Midcap150 Momentum 50 61,605.80 0.51% -1.77% -3.71%   Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	Nifty 200 Quality 30	20,245.45	0.24%	-2.47%	-3.71%
Nifty High Beta 50 3,687.05 -0.45% -3.24% -4.71%   Nifty Low Volatility 50 24,807.50 0.32% -0.87% -2.26%   Nifty Midcap150 Momentum 50 61,605.80 0.51% -1.77% -3.71%   Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	Nifty 50 Equal Weight	31,088.95	-0.05%	-1.67%	-3.01%
Nifty Low Volatility 50 24,807.50 0.32% -0.87% -2.26%   Nifty Midcap150 Momentum 50 61,605.80 0.51% -1.77% -3.71%   Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	NIFTY Alpha Low Volatility 30	26,464.90	0.14%	-1.11%	-2.66%
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Nifty PSE 9,780.35 0.01% -2.47% -3.10%   Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	Nifty Low Volatility 50	24,807.50	0.32%	-0.87%	-2.26%
Nifty SME Emerge 15,136.33 0.23% -0.17% 2.39%	Nifty Midcap150 Momentum 50	61,605.80	0.51%	-1.77%	-3.71%
· · · · · · · · · · · · · · · · · · ·	Nifty PSE	9,780.35	0.01%	-2.47%	-3.10%
Nifty 100 ESG 4 900 30 -0.03% -1.40% -2.27%	Nifty SME Emerge	15,136.33	0.23%	-0.17%	2.39%
4,500.30 -1.45% -2.27%	Nifty 100 ESG	4,900.30	-0.03%	-1.49%	-2.27%

Index	30-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,745.80	-0.60%	-1.39%	-0.53%
Nifty Bank	56,150.70	-0.13%	-1.85%	-2.03%
Nifty Consumption	11,700.10	0.20%	-1.17%	-1.21%
Nifty Financial	26,703.50	0.01%	-1.88%	-1.73%
Nifty FMCG	55,020.40	0.24%	-1.24%	0.25%
Nifty Healthcare	15,040.45	-0.05%	2.67%	3.99%
Nifty IT	35,481.70	0.31%	-3.98%	-8.90%
Nifty Media	1,624.80	-0.79%	-5.39%	-7.39%
Nifty Metal	9,399.75	-0.11%	-1.87%	-1.42%
Nifty MNC	28,746.60	0.26%	-1.82%	-0.66%
Nifty Pharma	23,073.90	0.01%	2.93%	4.70%
Nifty Realty	917.65	-0.96%	-5.42%	-6.98%
Nifty Energy	35,422.05	0.03%	-2.43%	-3.14%

Nifty 50 Top 5 Gainers				
Company	30-Jul-25	Prev_Day	% Change	1 Week
L&T Ltd.	3,665.10	3,495.60	4.85	5.17
Britannia Industries Limited	5,747.00	5,626.00	2.15	0.48
Sun Pharma	1,733.80	1,710.50	1.36	3.05
NTPC	338.80	334.60	1.26	-1.24
Maruti	12,618.00	12,469.00	1.20	-0.07
Source: NSE				

Nifty 50 Top 5 Loser	<u> </u>			
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Company	30-Jul-25	Prev_Day	% Change	1 Week
Tata Motors	668.45	692	-3.45	-3.14
Hero Moto	4,251.30	4325	-1.71	-2.58
Power Grid	288.95	293	-1.42	-3.44
Bajaj Auto	8,043.50	8128	-1.03	-4.21
Coal India	379.90	384	-0.98	-2.78
Source: NSE				



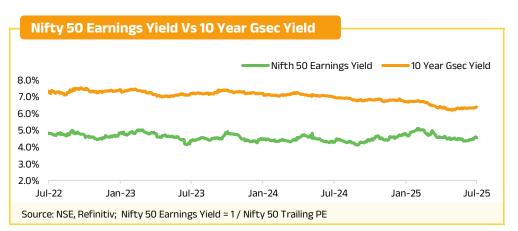


Indian equity markets witnessed a range-bound session and closed with moderate gains, as sentiment remained cautious due to lingering uncertainty over an India-U.S. trade deal ahead of the August 1 deadline. Market performance was also influenced by caution surrounding the upcoming U.S. Federal Reserve policy decision, even though the central bank is widely expected to keep interest rates unchanged.

Hyundai Motor India reported its results for the first quarter ended Jun 30, 2025, posting an 8% YoY decline in consolidated net profit to Rs. 1,369.23 crore, compared to RS. 1,489.65 crore in the same quarter of the previous financial year.

Power Grid Corporation of India registered a 2.5% YoY drop in consolidated net profit to Rs. 3,630.58 crore for the quarter ended Jun 2025, down from Rs. 3,723.92 crore in the corresponding quarter last year.

Punjab National Bank reported a standalone net profit of Rs. 1,675 crore for the quarter ended Jun 2025, marking a 48% YoY decline from Rs. 3,251.5 crore in the first quarter of FY25.





Fils & Mutual Funds Flo	ws Vs Nifty 50		
26000			15000
25500			10000
25000		~	5000
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24500		•	-5000
24000			-10000
30-Jun-25 6-Jul-25	12-Jul-25 18-Jul-25	24-Jul-25	30-Jul-25
FII - Equity (Net I	nflows) MFs - Equity (Net I	nflows) ——Ni	ifty 50
Source: FPI NSDL, SEBI, NSE			

Institutional Flo	ows (Equity)			
Baranta Man	Net	MTD	0.7.0	INR Cr.
Description	Net	MTD	QTD	YTD
FII	-3692.35	-17,578	-17,578	-95,479
MF**	1502.02	31,468	31,468	264,520
DII	1829.11	54,566	54,566	403,042
Source: SEBI, NSDL:**As or	n 24th Jul 2025:			

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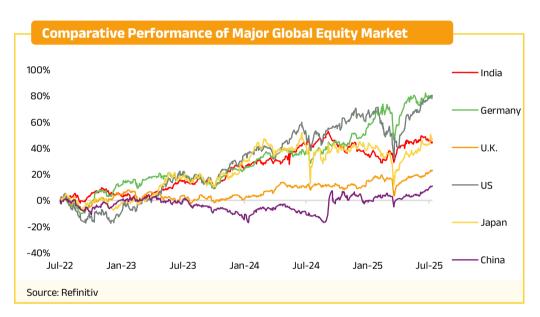


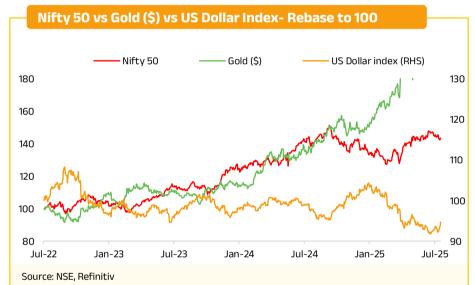
#### F&O Trends Latest **Previous** Change % **Near Futures** 24869.30 24838.80 0.12% **Near Basis** 14.25 17.70 -19.49% Mid Futures 24959.10 24934.70 0.10% Mid Basis 104.05 113.60 -8.41% Near Open Interest (Cr.) -23.45% 0.70 0.91 Mid Open Interest (Cr.) 1.26 1.03 22.62% Rollover (%) 65.63 54.56 20.29% Put Call Ratio (OI) 0.87 0.80 8.55% Put Call Ratio(Vol) 0.83 0.84 -0.90% Source: NSE

FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	9674	10798	43761
Index Options	1962647	1978245	363702
Stock Futures	135578	132371	382917
Stock Options	27373	27005	54301
Total	2135271	2148419	844681
Source: NSE			

Global Equity Market				
Global Indices	30-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3481.24	-0.12%	0.00%	2.52%
Nasdaq 100 (U.S.)	23345.41	0.16%	0.79%	2.94%
FTSE (U.K.)	9136.94	0.01%	0.83%	4.29%
DAX Index (Germany)	24262.22	0.19%	0.09%	1.47%
CAC 40 Index (France)	7861.96	0.06%	0.15%	2.56%
SSE Composite (China)	3615.72	0.17%	0.93%	4.97%
Nikkei (Japan)	40654.70	-0.05%	-1.25%	0.41%
Kospi (South Korea)	3254.47	0.74%	2.22%	5.95%
HangSeng (Hong Kong)	25176.93	-1.36%	-1.41%	4.59%
Strait Times (Singapore)	4219.41	-0.24%	-0.28%	6.44%
Ibovespa Sao Paulo (Brazil)	133989.74	0.95%	-1.02%	-3.50%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8756.40	0.60%	0.22%	2.51%
Jakarta Composite (Indonesia)	7549.89	-0.89%	1.08%	8.98%
KLSE (Malaysia)	1524.50	0.04%	-0.35%	-0.55%
Source: Refinitiv; Positive returns indic	ates green colour, u	ınchanged is yellov	v and negative ret	urns is rose.

Global & Domestic	Commodity	Market		
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Commodity Prices	30-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,616	0.72%	-1.51%	3.07%
Gold (\$/oz)	3,274.75	-1.55%	-3.33%	-0.86%
Silver (INR/1 kg)	113,405	0.16%	-2.07%	7.27%
Silver (\$/oz)	37.13	-2.80%	-5.49%	2.90%
Brent Crude(\$/bbl)	74.81	2.30%	6.93%	5.16%
Crude Oil (INR/1 bbl)	6,010.00	4.09%	6.67%	7.21%
NYMEX Crude(\$/bbl)	70.99	1.17%	7.64%	7.24%
Natural Gas (INR/1 mmbtu)	272.90	5.53%	-2.71%	-14.69%
Aluminium (INR/1 kg)	254.85	0.28%	0.14%	2.19%
Copper (INR/1 kg)	900.00	0.10%	-0.39%	0.82%
Nickel (INR/1 kg)	1,339.40	0.44%	-0.54%	1.46%
Lead (INR/1 kg)	183.50	-0.27%	-0.84%	-1.61%
Zinc (INR/1 kg)	270.50	0.19%	-0.73%	2.79%
Mentha Oil (INR/1 kg)	961.20	0.42%	2.26%	3.12%
Baltic Dry Index	1,995	-5.41%	-5.90%	33.98%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				





### Term of the Day



## Sector Rotation and Institutional Flows

Definition: Sector rotation is the strategic movement of investments from one industry sector to another based on expected performance due to macroeconomic or market conditions.



### Explanation

Equity markets are showing signs of sector rotation, with defensive sectors like FMCG and Healthcare gaining traction, while cyclical sectors such as IT and Realty are underperforming. This shift reflects investor caution amid global trade uncertainties and mixed earnings results. Institutional flows reveal that foreign investors are trimming positions, while domestic mutual funds and insurance firms continue to support the market. The rotation suggests a preference for stability and earnings visibility over aggressive growth bets. Portfolio managers are rebalancing toward sectors with resilient demand and lower sensitivity to global shocks.

### Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-2.03	7.48	-0.53	15.49
Mid Cap Fund	-1.57	10.32	-0.37	22.46
Large & Mid Cap Fund	-2.03	9.10	0.19	19.47
Small Cap Fund	-0.72	9.69	-1.18	22.81
Multi Cap Fund	-1.37	9.11	0.36	20.65
Focused Fund	-1.64	8.23	0.16	17.04
Value Fund	-1.63	7.40	-2.69	20.97
Contra Fund	-1.28	8.16	-0.68	21.93
ELSS	-1.66	8.61	-0.47	18.43
Equity Savings	-0.15	4.81	5.10	10.14
Arbitrage Fund	0.45	3.17	6.63	6.77
Dividend Yield Fund	-2.00	5.98	-4.66	20.05
Aggressive Hybrid Fund	-1.13	7.58	1.98	15.47
Balanced Advantage	-0.81	5.96	2.17	12.34

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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