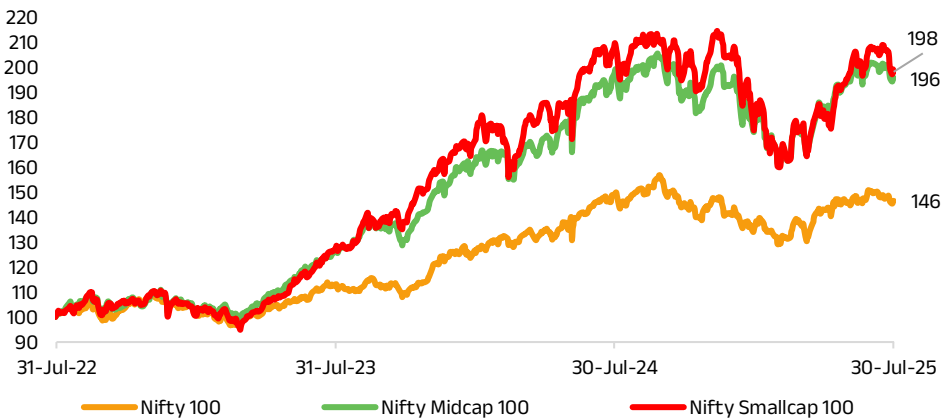


Broad Indices Historical Movement



Source: NSE

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 indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	30-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,306.85	-0.14%	-2.86%	-5.00%
NIFTY 500 Value 50	14,005.50	-0.57%	-2.50%	-2.51%
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 100 ESG	4,900.30	-0.03%	-1.49%	-2.27%

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

Sector Indices

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%

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

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

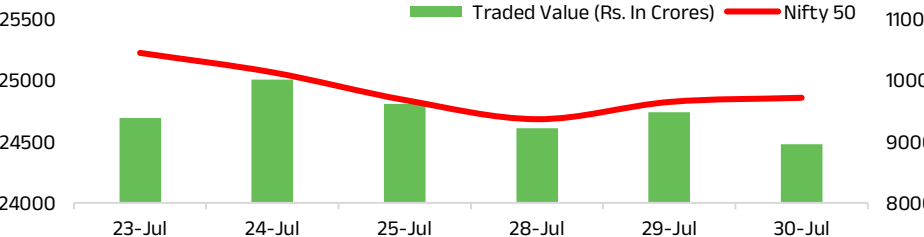
Source: NSE

Nifty 50 Top 5 Losers

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

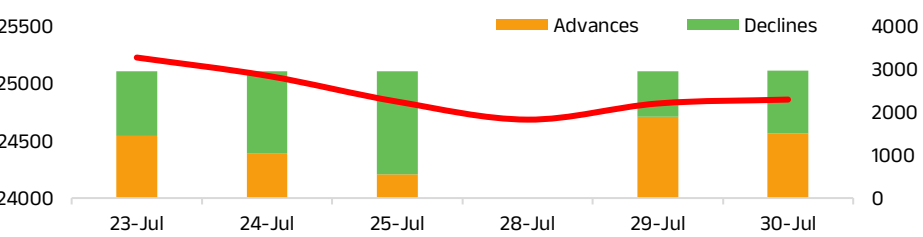
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

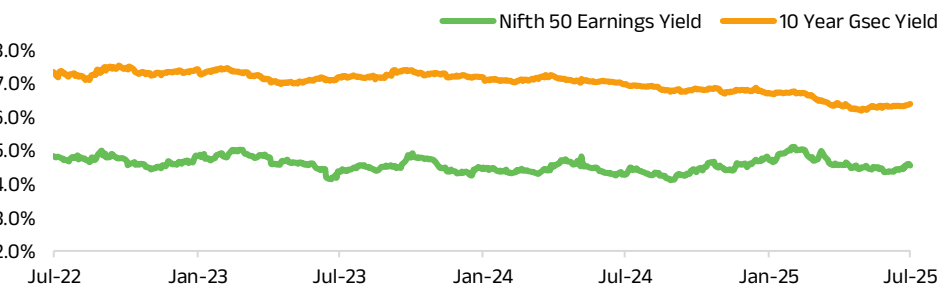
Indian equity markets witnessed a range-bound session and closed with moderate gains, as sentiment remained cautious due to lingering uncertainty over an India-U.S. trade deal ahead of the August 1 deadline. Market performance was also influenced by caution surrounding the upcoming U.S. Federal Reserve 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.

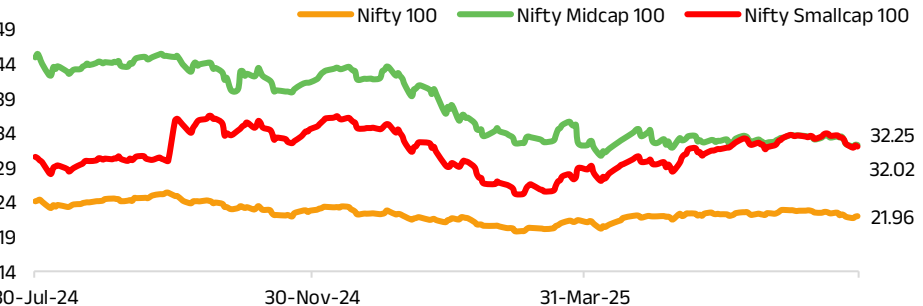
Punjab National Bank reported a standalone net profit of Rs. 1,675 crore for the quarter ended Jun 2025, marking a 48% YoY decline from Rs. 3,251.5 crore in the first quarter of FY25.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



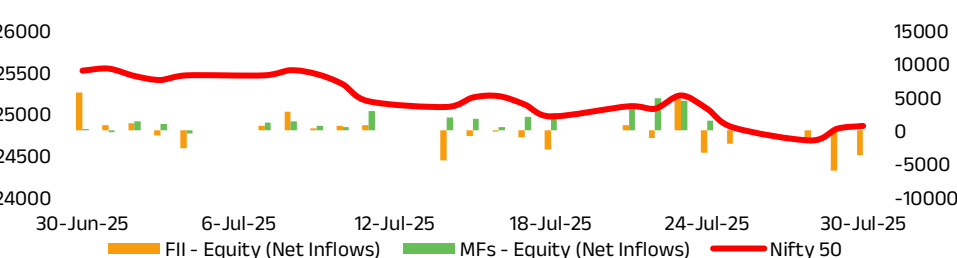
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-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

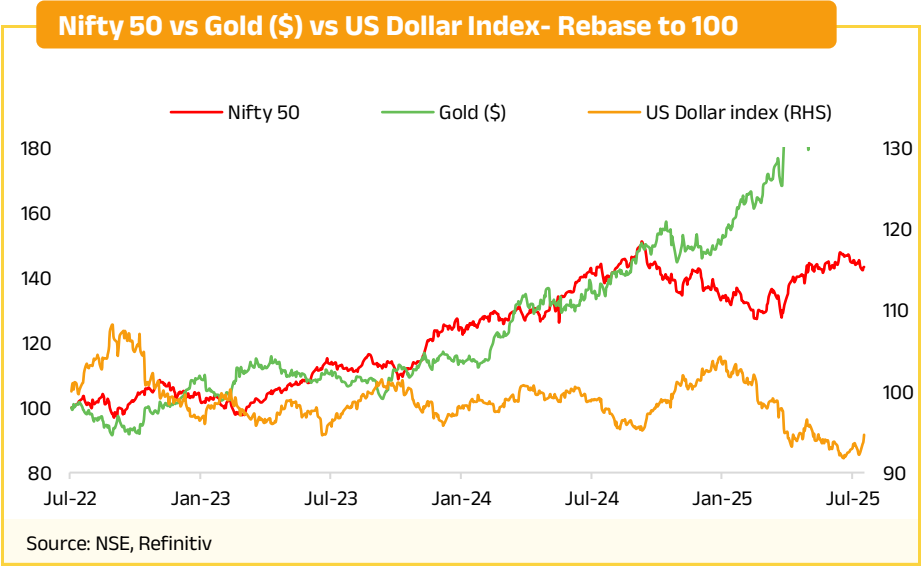
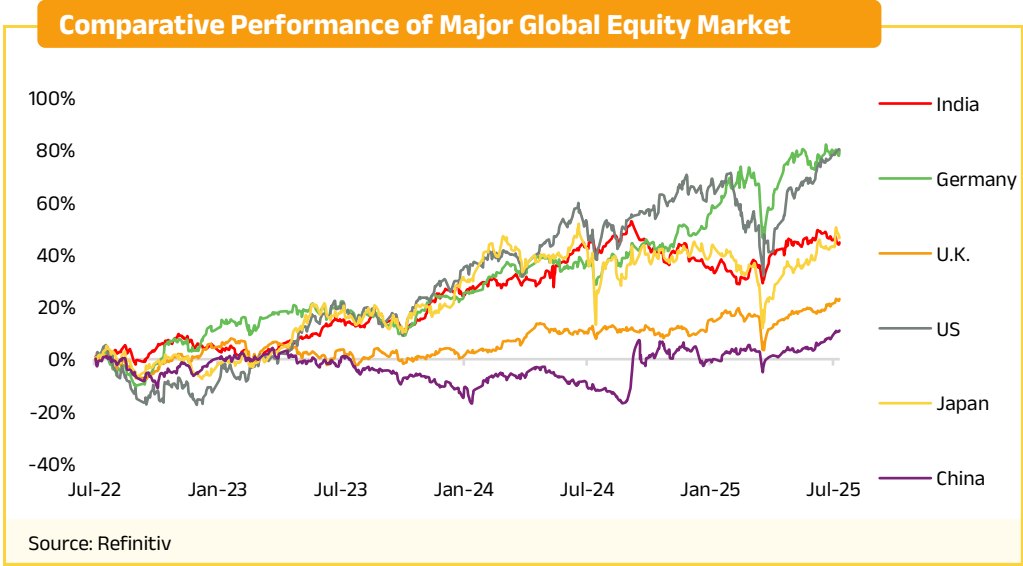
Source: SEBI, NSDL;\*\*As on 24th Jul 2025;

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.)	0.70	0.91	-23.45%
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 indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
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.				