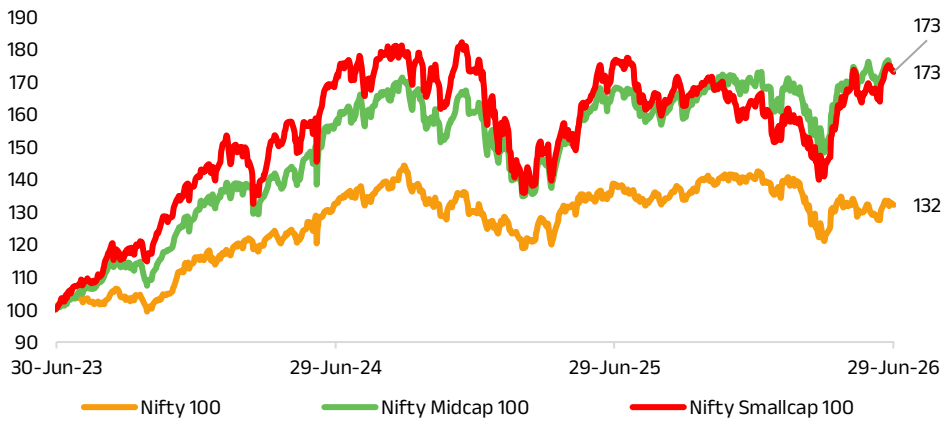


Broad Indices Historical Movement



Source: NSE

Broad Indices

	29-Jun-26	1 Day	1 Week	1 Month
Nifty 50	23,946.25	-0.46%	-0.65%	1.69%
Nifty 100	24,976.70	-0.55%	-0.92%	1.50%
Nifty 200	13,820.10	-0.51%	-1.11%	1.14%
Nifty 500	23,000.00	-0.49%	-1.13%	1.51%
Nifty Large Midcap 250	16,462.30	-0.43%	-1.33%	0.97%
Nifty Midcap 150	22,679.65	-0.31%	-1.71%	0.48%
Nifty Next 50	71,510.30	-0.95%	-2.14%	0.61%
Nifty Smallcap 250	17,619.60	-0.48%	-1.29%	3.69%

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

Smart Beta Index

Index	29-Jun-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,937.95	-0.79%	-1.30%	1.57%
NIFTY 500 Value 50	16,119.70	-0.35%	-2.98%	-2.76%
Nifty 200 Quality 30	19,613.00	-0.74%	-2.11%	-2.48%
Nifty 50 Equal Weight	32,449.30	-0.39%	-0.95%	0.18%
NIFTY Alpha Low Volatility 30	26,293.35	-0.57%	-0.31%	2.39%
Nifty High Beta 50	4,270.50	-0.60%	-2.45%	0.38%
Nifty Low Volatility 50	24,221.15	-0.59%	-0.54%	0.57%
Nifty Midcap150 Momentum 50	63,142.20	-0.84%	-2.55%	-0.44%
Nifty PSE	9,969.50	0.16%	-2.71%	-2.52%
Nifty SME Emerge	13,964.65	-0.57%	-0.99%	1.76%
Nifty 100 ESG	4,858.35	-0.56%	-1.21%	0.77%

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

Sector Indices

Index	29-Jun-26	1 Day	1 Week	1 Month
Nifty Auto	26,417.60	-2.08%	-1.07%	0.30%
Nifty Bank	57,727.35	-0.77%	-0.36%	6.43%
Nifty Consumption	11,491.40	-0.88%	-1.00%	2.05%
Nifty Financial	26,598.35	-0.64%	0.05%	4.91%
Nifty FMCG	49,127.65	-0.59%	-0.46%	-0.52%
Nifty Healthcare	16,113.40	0.94%	1.77%	4.68%
Nifty IT	27,038.50	-1.07%	-2.14%	-7.02%
Nifty Media	1,489.85	-1.32%	-3.06%	5.79%
Nifty Metal	12,545.00	0.80%	-4.17%	-6.67%
Nifty MNC	32,227.95	-0.92%	-1.78%	-0.70%
Nifty Pharma	25,227.90	1.03%	1.88%	3.62%
Nifty Realty	818.85	-0.90%	0.45%	4.64%
Nifty Energy	39,718.00	0.20%	-2.59%	-2.84%

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

Nifty 50 Top 5 Gainers

Company	29-Jun-26	Prev_Day	% Change	1 Week
Coal India	444.85	435.40	2.17	-0.92
NTPC	356.10	352.05	1.15	-2.98
Hindalco	963.80	953.20	1.11	-4.97
Cipla	1,454.10	1,440.10	0.97	2.71
Power Grid	286.25	283.90	0.83	-1.21

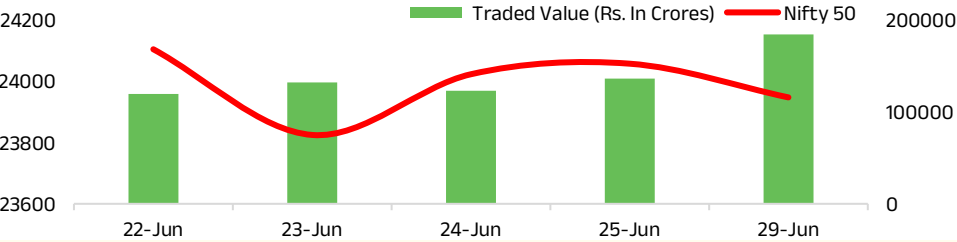
Source: NSE

Nifty 50 Top 5 Losers

Company	29-Jun-26	Prev_Day	% Change	1 Week
United Phos	568.40	591	-3.74	-6.13
Indian Oil	139.18	144	-3.27	-3.60
BPCL	300.80	310	-2.89	-2.53
M&M	3,093.00	3182	-2.80	0.97
Britannia Industries Lim	5,102.00	5237	-2.58	-2.21

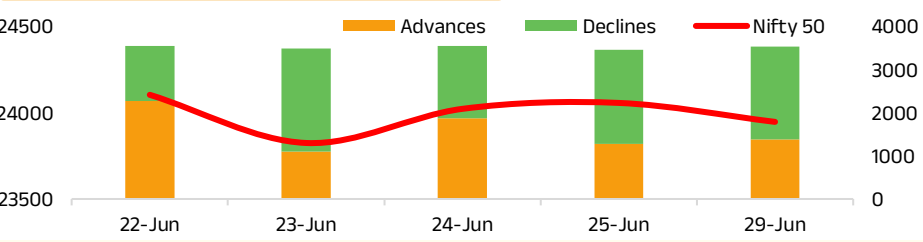
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

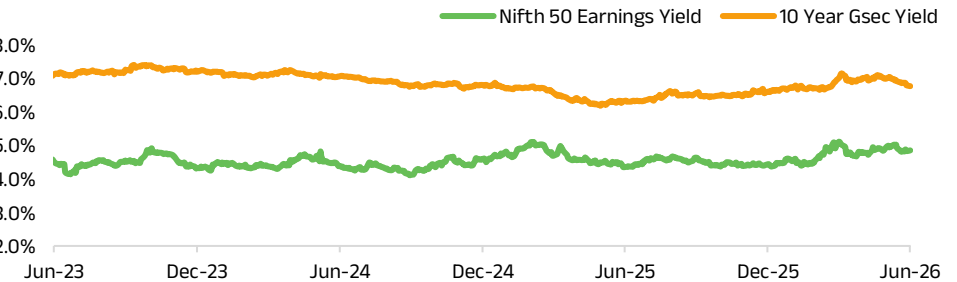
Indian equity markets fell as trading resumed after a long holiday weekend. A cautious undertone prevailed amid fresh U.S.-Iran tensions, concerns over potential Federal Reserve rate hikes, and the recent sell-off in global technology stocks. Meanwhile, following renewed exchanges over the weekend, the United States and Iran have agreed to halt military strikes against each other and will meet on Jun 30, 2026, in Doha, Qatar, to resolve their disputes over shipping routes and transit fees.

Puravankara has partnered with a landowner to develop a 6.4-acre housing project in Bengaluru, with an estimated revenue potential of Rs. 1,000 crore. The company stated that it has entered into a joint development agreement (JDA) for the land parcel in Sarjapur, Bengaluru.

Tiruppur, the city in Tamil Nadu known as India's knitwear capital, recorded its highest-ever exports of Rs. 46,000 crore in 2025-26 (FY26), despite uncertainty arising from additional tariffs imposed by the United States (US) and the conflict in West Asia.

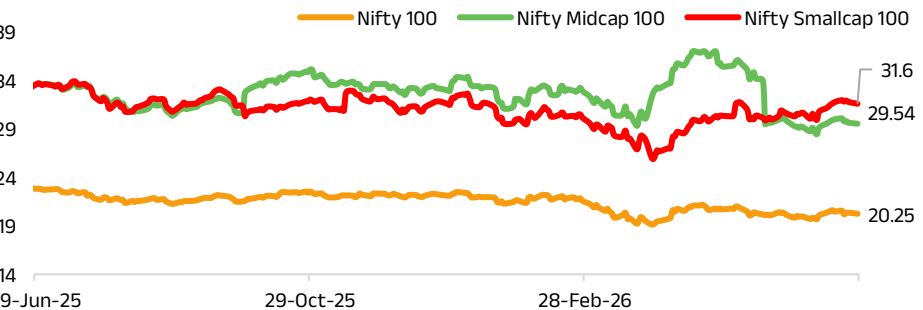
Embassy Developments will invest Rs. 1,500 crore to construct a 3 million sq ft office complex in Bengaluru, as part of its strategy to generate rental income from commercial assets.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



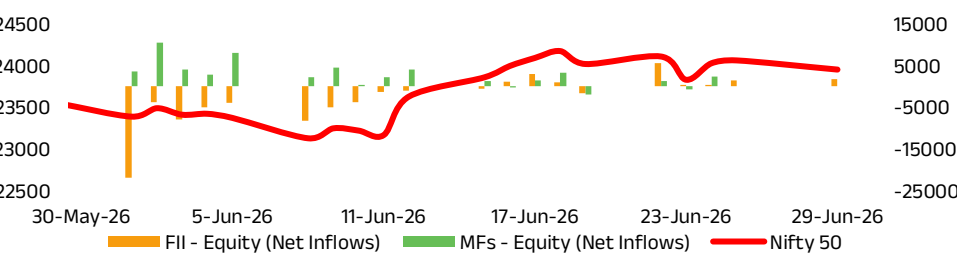
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1566.4	-51,456	-145,267	-276,389
MF**	2313.08	47,608	138,799	291,409
DII	2801.45	78,958	209,724	457,049

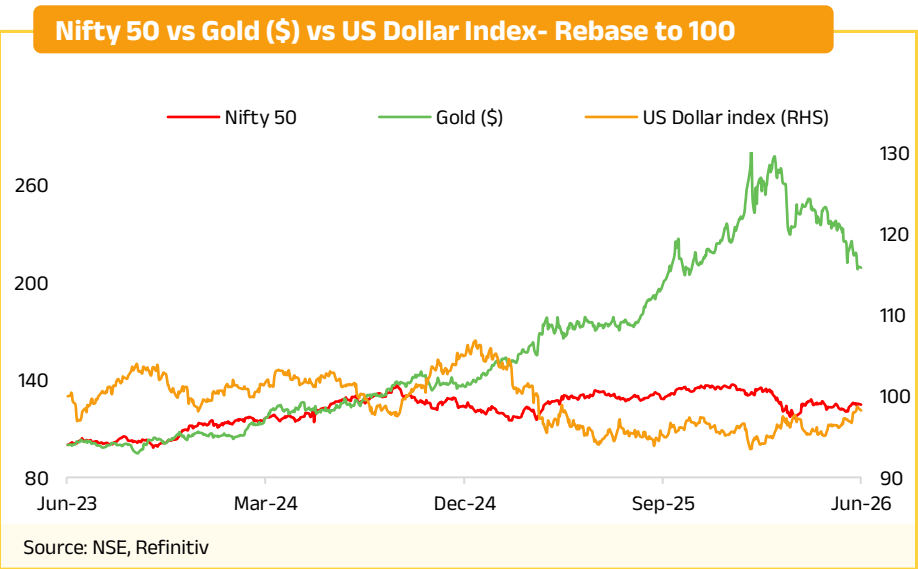
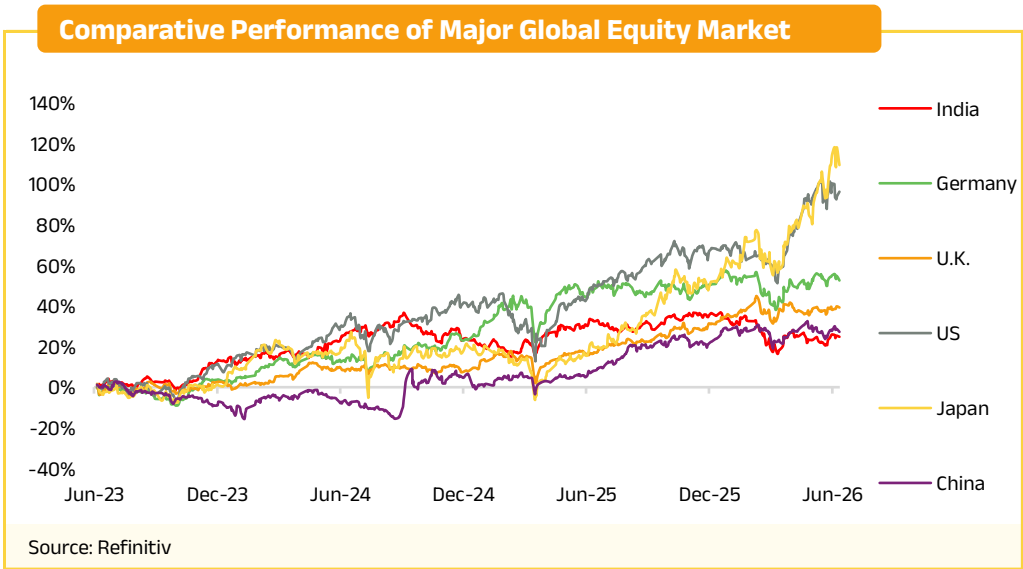
Source: SEBI, NSDL;**As on 24th Jun 2026;

F&O Trends			
	Latest	Previous	Change %
Near Futures	23972.90	24102.30	-0.54%
Near Basis	26.65	46.30	-42.44%
Mid Futures	24037.70	24170.50	-0.55%
Mid Basis	91.45	114.50	-20.13%
Near Open Interest (Cr.)	0.69	0.99	-30.73%
Mid Open Interest (Cr.)	1.27	0.92	39.10%
Rollover (%)	66.94	50.52	32.51%
Put Call Ratio (OI)	0.85	1.06	-19.84%
Put Call Ratio(Vol)	1.15	0.96	20.34%
Source: NSE			

FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	14512	13778	52838
Index Options	4992186	5005279	560760
Stock Futures	180432	180244	486729
Stock Options	31948	31170	105136
Total	5219078	5230471	1205463
Source: NSE			

Global Equity Market				
Global Indices	29-Jun-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4061.83	1.20%	-0.09%	-1.39%
Nasdaq 100 (U.S.)	29774.75	2.25%	-1.89%	-1.84%
FTSE (U.K.)	10484.22	-0.23%	0.44%	0.72%
DAX Index (Germany)	24626.89	-0.18%	-2.04%	-1.90%
CAC 40 Index (France)	8367.33	-0.21%	-0.39%	2.25%
SSE Composite (China)	4073.90	1.16%	-2.14%	0.13%
Nikkei (Japan)	69468.11	0.15%	-3.99%	4.73%
Kospi (South Korea)	8394.65	-0.20%	-7.90%	-0.96%
HangSeng (Hong Kong)	23026.68	1.57%	-3.12%	-8.56%
Strait Times (Singapore)	5208.75	0.33%	0.09%	3.39%
Ibovespa Sao Paulo (Brazil)	173205.35	-0.05%	1.66%	-0.33%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8823.40	0.68%	0.08%	1.05%
Jakarta Composite (Indonesia)	5820.79	-1.28%	-4.84%	-5.00%
KLSE (Malaysia)	1665.91	-0.11%	-2.05%	-1.02%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	29-Jun-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	141,068	0.88%	-3.87%	-9.55%
Gold (\$/oz)	4,016.02	-1.77%	-4.16%	-11.46%
Silver (INR/1 kg)	219,348	0.31%	-7.76%	-16.72%
Silver (\$/oz)	58.30	-1.46%	-10.56%	-22.53%
Brent Crude(\$/bbl)	70.09	1.49%	-10.37%	-27.94%
Crude Oil (INR/1 bbl)	6,541.00	-1.80%	-9.43%	-23.19%
NYMEX Crude(\$/bbl)	71.77	2.24%	-8.79%	-21.05%
Natural Gas (INR/1 mmbtu)	309.80	1.57%	1.64%	-1.56%
Aluminium (INR/1 kg)	335.05	0.92%	-7.27%	-13.58%
Copper (INR/1 kg)	1,275.00	-1.30%	-4.60%	-5.97%
Nickel (INR/1 kg)	1,618.30	-0.38%	-5.65%	-11.67%
Lead (INR/1 kg)	204.85	-1.37%	-1.04%	-2.29%
Zinc (INR/1 kg)	362.30	0.46%	-2.86%	-2.67%
Mentha Oil (INR/1 kg)	1,097.70	0.37%	-1.68%	4.13%
Baltic Dry Index	2,490	-1.35%	-7.23%	-22.77%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				



Term of the Day



Economic Moat

Definition: An economic moat is a sustainable competitive advantage that enables a company to protect its market position and maintain profitability over time. These advantages may arise from strong brands, proprietary technology, cost leadership, network effects, customer loyalty, or high switching costs, making it difficult for competitors to gain market share.



Explanation

The concept of an economic moat helps investors evaluate a company’s long-term strength and resilience. Businesses with durable competitive advantages are often better positioned to withstand industry challenges, defend their earnings, and create value over time. Understanding a company’s moat can provide insight into the sustainability of its business model and its ability to remain competitive in changing market environments.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.03	-4.34	-3.79	11.07
Flexi Cap Fund	2.55	-0.58	-0.82	13.27
Mid Cap Fund	1.89	3.89	4.08	18.79
Large & Mid Cap Fund	2.18	0.22	0.18	15.50
Small Cap Fund	4.42	9.46	5.98	17.56
Multi Cap Fund	2.62	2.24	1.75	16.32
Focused Fund	2.66	-0.56	-0.30	13.24
Value Fund	1.92	-0.54	0.59	15.26
Contra Fund	2.25	-4.01	-2.78	15.44
ELSS	2.51	-0.69	-1.40	13.40
Equity Savings	1.32	0.85	3.05	8.49
Arbitrage Fund	0.87	2.88	5.71	6.64
Dividend Yield Fund	1.19	-1.58	-0.59	15.10
Aggressive Hybrid Fund	2.06	-1.08	-0.43	11.71
Balanced Advantage	1.64	-1.04	0.04	9.72
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.				