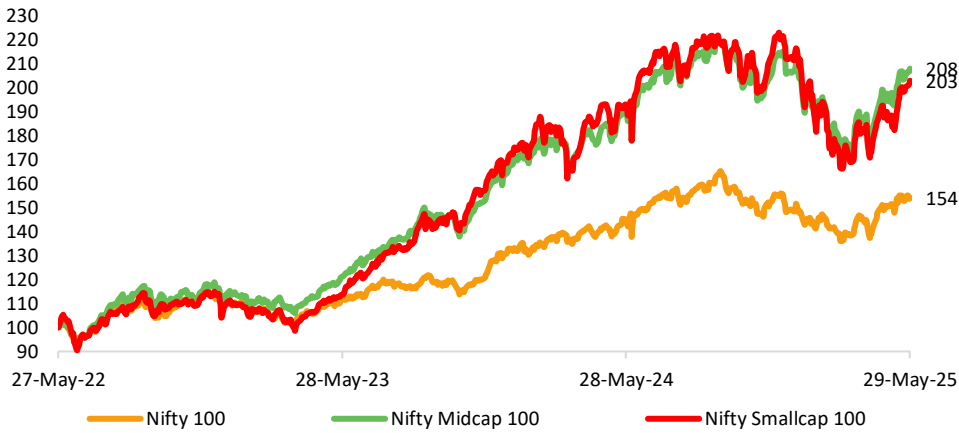


Broad Indices Historical Movement



Source: NSE

Broad Indices

	29-May-25	1 Day	1 Week	1 Month
Nifty 50	24,833.60	0.33%	0.91%	2.04%
Nifty 100	25,436.30	0.30%	0.85%	2.28%
Nifty 200	13,841.55	0.34%	1.04%	2.77%
Nifty 500	22,861.35	0.36%	1.18%	3.39%
Nifty Large Midcap 250	16,037.85	0.43%	1.42%	4.03%
Nifty Midcap 150	21,163.15	0.56%	1.98%	5.77%
Nifty Next 50	67,093.80	0.15%	0.56%	3.39%
Nifty Smallcap 250	16,779.55	0.44%	2.09%	7.29%

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

Smart Beta Index

Index	29-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,547.05	0.86%	1.29%	4.02%
NIFTY 500 Value 50	13,928.60	0.22%	0.92%	2.78%
Nifty 200 Quality 30	20,695.35	0.25%	1.20%	4.07%
Nifty 50 Equal Weight	31,108.40	0.37%	1.12%	2.76%
NIFTY Alpha Low Volatility 30	26,529.70	0.42%	0.21%	1.21%
Nifty High Beta 50	3,733.95	0.58%	2.14%	7.39%
Nifty Low Volatility 50	24,834.30	0.22%	0.63%	1.10%
Nifty Midcap150 Momentum 50	61,017.15	0.89%	1.66%	5.00%
Nifty PSE	9,981.95	-0.02%	0.95%	3.61%
Nifty SME Emerge	14,314.03	0.68%	0.97%	3.42%
Nifty 100 ESG	4,880.35	0.25%	1.05%	3.24%

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

Sector Indices

Index	29-May-25	1 Day	1 Week	1 Month
Nifty Auto	23,555.75	0.51%	0.41%	5.64%
Nifty Bank	55,546.05	0.23%	1.10%	0.28%
Nifty Consumption	11,439.20	0.28%	0.32%	1.15%
Nifty Financial	26,478.45	0.10%	0.96%	1.09%
Nifty FMCG	55,630.45	-0.13%	0.06%	-1.49%
Nifty Healthcare	13,989.45	0.55%	0.06%	-0.02%
Nifty IT	37,754.15	0.77%	1.90%	5.11%
Nifty Media	1,711.05	0.20%	2.21%	10.56%
Nifty Metal	9,351.65	1.21%	1.87%	8.65%
Nifty MNC	28,306.15	0.64%	1.42%	5.19%
Nifty Pharma	21,589.35	0.92%	0.31%	-0.40%
Nifty Realty	955.70	1.14%	2.28%	9.95%
Nifty Energy	35,988.70	0.28%	1.79%	4.50%

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

Nifty 50 Top 5 Gainers

Company	29-May-25	Prev_Day	% Change	1 Week
IndusInd Bank	824.15	805.15	2.36	4.99
Sun Pharma	1,699.80	1,666.40	2.00	-1.10
Adani Ports & SEZ	1,438.60	1,411.00	1.96	4.90
Tech Mahindra	1,600.00	1,580.30	1.25	2.20
Wipro	250.14	247.43	1.10	1.71

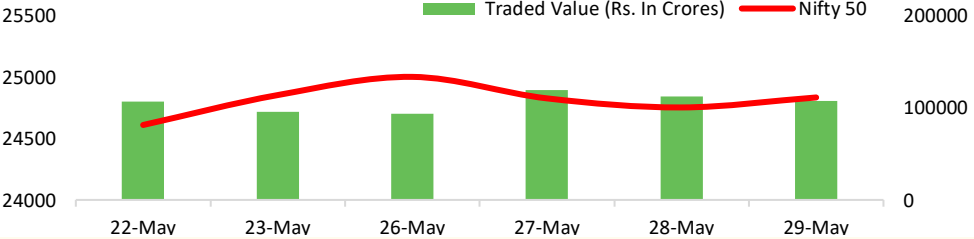
Source: NSE

Nifty 50 Top 5 Losers

Company	29-May-25	Prev_Day	% Change	1 Week
HDFC Std Life Insurance Co. Ltd	780.90	789	-1.08	3.31
Tata Beverages	1,109.80	1121	-1.03	-1.50
BPCL	319.15	322	-0.79	1.95
Bajaj Finance	9,204.00	9268	-0.69	0.71
Asian Paints	2,294.30	2303	-0.39	-0.21

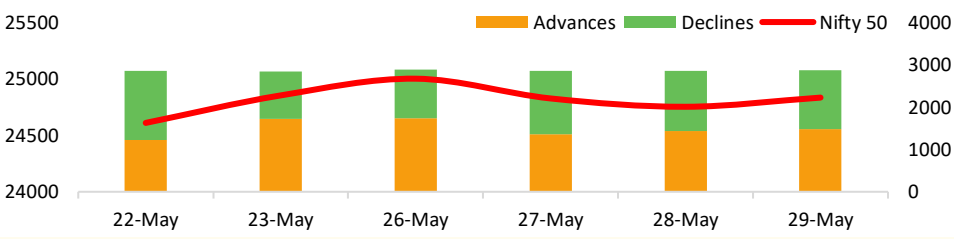
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE



Indian equity markets experienced a volatile trading session, driven by the expiry of May 2025 futures and options (F&O) contracts. Early gains were wiped out due to concerns over a potential liquidity crunch, sparked by a series of block deals involving promoters and private equity firms in recent days.



Infosys has introduced over 200 enterprise AI agents as a component of its Infosys Topaz AI solutions in partnership with Google Cloud's Vertex AI platform. This initiative represents a notable achievement in the company's goal to revolutionize enterprise operations using advanced artificial intelligence.

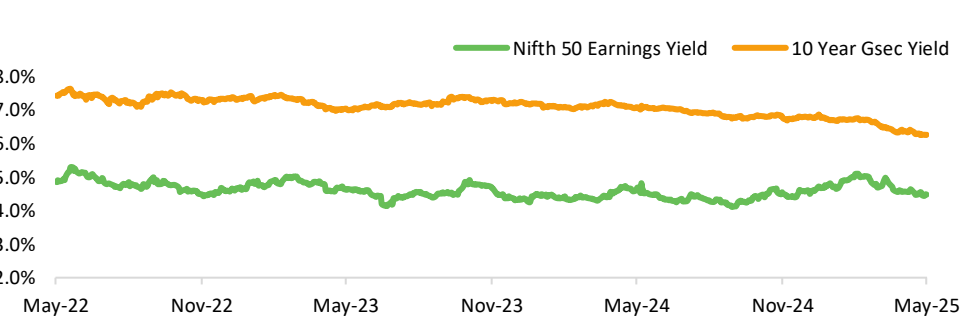


Wipro Limited, a prominent technology company recognized for its artificial intelligence (AI) technology services and consulting, has launched its global Wipro Innovation Network. This initiative is designed to enhance co-innovation with clients through the use of advanced technologies.



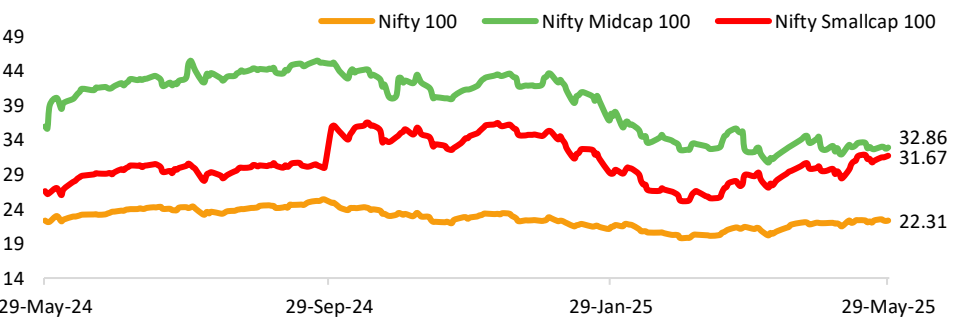
Golden Growth Fund (GGF) and the real estate company Grovy India are set to invest Rs. 180 crore in the development of three housing projects located in South Delhi. The GGF is classified as a category II Alternative Investment Fund (AIF) that focuses on real estate investments, specifically targeting projects in South Delhi.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



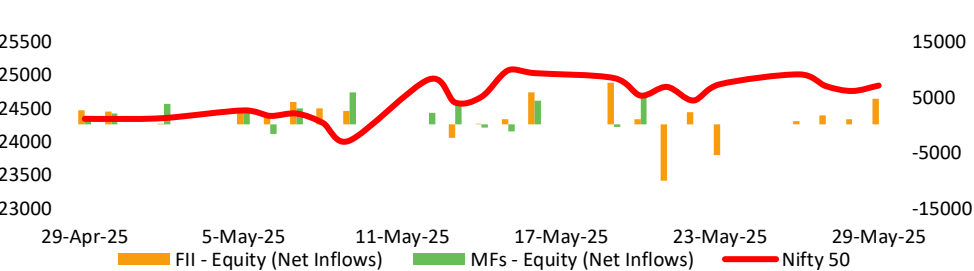
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII's & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII	4649.7	21,618	25,842	-90,732
MF**	5602.41	26,942	43,985	156,118
DII*	4662.92	51,011	79,239	265,123

Source: SEBI, NSDL; *As on 28th May 2025; **As on 20th May 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24814.20	24762.50	0.21%
Near Basis	-19.40	10.05	-293.04%
Mid Futures	24942.80	24860.70	0.33%
Mid Basis	109.20	108.25	0.88%
Near Open Interest (Cr.)	0.39	0.59	-33.48%
Mid Open Interest (Cr.)	1.27	1.24	2.36%
Rollover (%)	79.10	70.02	12.96%
Put Call Ratio (OI)	0.79	0.76	4.66%
Put Call Ratio(Vol)	0.78	0.88	-11.97%
Source: NSE			

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	7272	9377	33116
Index Options	1354859	1455238	544802
Stock Futures	98469	102282	388908
Stock Options	63213	66905	128802
Total	1523813	1633802	1095627
Source: NSE			

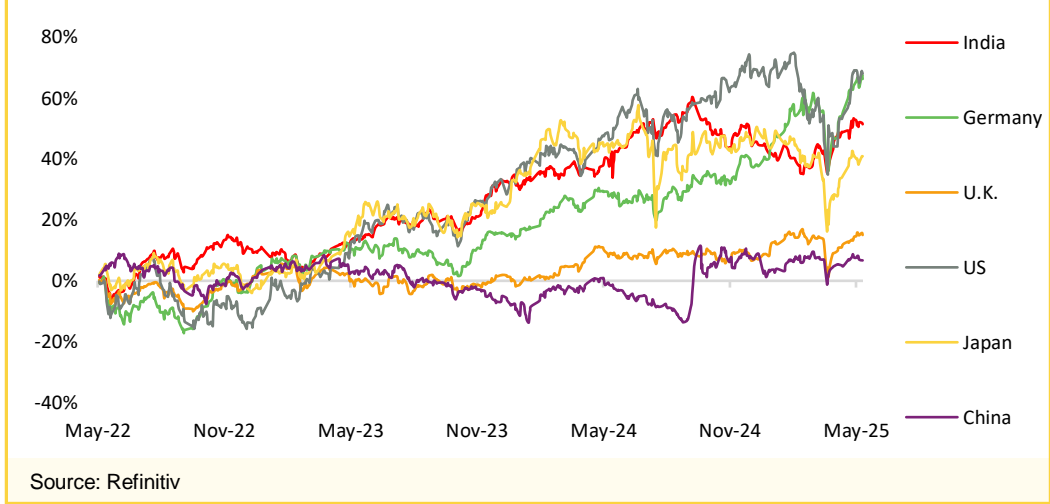
Global Equity Market

Global Indices	29-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3235.57	0.37%	1.18%	6.36%
Nasdaq 100 (U.S.)	21363.95	0.21%	1.19%	9.31%
FTSE (U.K.)	8716.45	-0.11%	-0.26%	2.99%
DAX Index (Germany)	23933.23	-0.44%	-0.27%	6.72%
CAC 40 Index (France)	7779.72	-0.11%	-1.08%	2.96%
SSE Composite (China)	3363.45	0.70%	-0.50%	2.34%
Nikkei (Japan)	38432.98	1.88%	3.91%	7.23%
Kospi (South Korea)	2720.64	1.89%	4.90%	6.05%
HangSeng (Hong Kong)	23573.38	1.35%	0.12%	7.11%
Strait Times (Singapore)	3916.84	0.13%	0.95%	2.93%
Ibovespa Sao Paulo (Brazil)	138533.70	-0.25%	0.92%	2.55%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8409.80	0.15%	0.73%	4.20%
Jakarta Composite (Indonesia) ^[1]	7175.82	-0.32%	0.12%	6.32%
KLSE (Malaysia)	1518.98	-0.30%	-0.53%	0.23%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

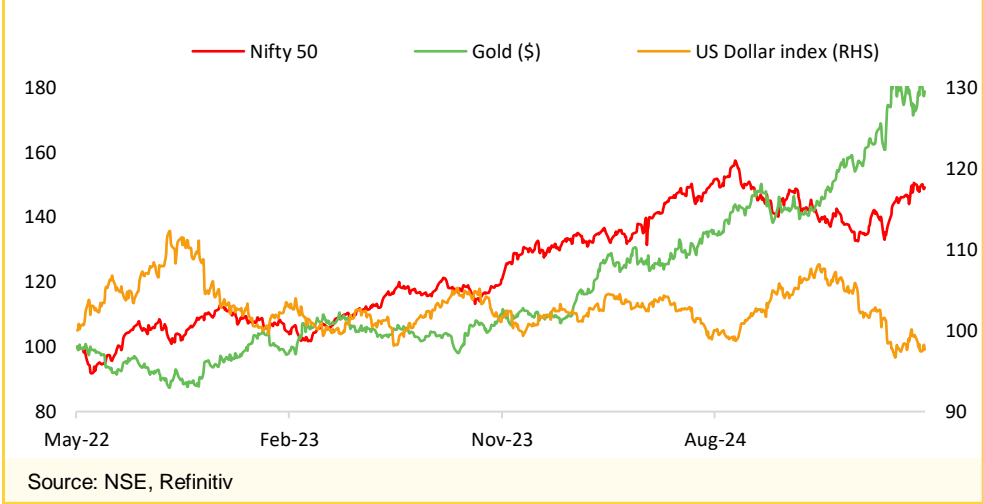
Global & Domestic Commodity Market

Commodity Prices	29-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	94,954	-0.59%	-0.46%	-0.64%
Gold (\$/oz)	3,315.90	0.81%	0.66%	-0.01%
Silver (INR/1 kg)	97,775	0.08%	0.25%	0.42%
Silver (\$/oz)	33.35	1.07%	0.82%	1.16%
Brent Crude(\$/bbl)	65.88	-0.48%	-0.21%	-1.72%
Crude Oil (INR/1 bbl)	5,299.00	2.00%	0.59%	0.23%
NYMEX Crude(\$/bbl)	61.46	-1.41%	-1.43%	-0.29%
Natural Gas (INR/1 mmbtu)	304.80	5.14%	5.80%	7.02%
Aluminium (INR/1 kg)	239.80	-0.19%	0.02%	1.18%
Copper (INR/1 kg)	870.35	0.20%	-0.02%	1.54%
Nickel (INR/1 kg)	1,325.80	-0.07%	-1.12%	-1.83%
Lead (INR/1 kg)	188.15	3.07%	0.97%	2.53%
Zinc (INR/1 kg)	260.20	0.12%	-0.72%	2.04%
Mentha Oil (INR/1 kg)	981.50	0.03%	-0.50%	-1.47%
Baltic Dry Index ^[1]	1,303	0.54%	-2.83%	-6.80%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Term of the Day



Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.29	0.67	8.17	17.26
Mid Cap Fund	5.54	-1.65	8.88	24.72
Large & Mid Cap Fund	4.03	-0.56	9.23	21.37
Small Cap Fund	6.46	-5.58	8.52	24.15
Multi Cap Fund	4.46	-1.68	8.43	22.57
Focused Fund	3.50	-0.62	9.06	18.69
Value Fund	3.73	-1.63	6.85	22.59
Contra Fund	2.87	-1.47	8.22	23.64
ELSS	4.06	-1.18	8.21	20.13
Equity Savings	1.27	2.74	8.39	10.55
Arbitrage Fund	0.34	3.30	6.94	6.51
Dividend Yield Fund	3.16	-1.52	6.00	21.99
Aggressive Hybrid Fund	2.74	1.08	9.27	16.65
Balanced Advantage	1.96	1.45	7.45	13.25
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.				

^[1]Data as on 28 May, 2025

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