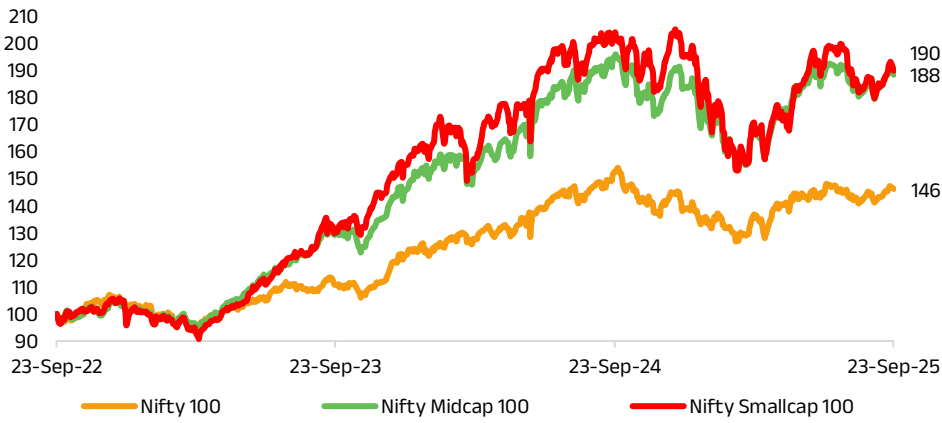


Broad Indices Historical Movement



Source: NSE

Broad Indices

	23-Sep-25	1 Day	1 Week	1 Month
Nifty 50	25,169.50	-0.13%	-0.28%	1.20%
Nifty 100	25,886.00	-0.19%	-0.07%	1.53%
Nifty 200	14,087.20	-0.21%	-0.14%	1.53%
Nifty 500	23,325.25	-0.24%	-0.19%	1.45%
Nifty Large Midcap 250	16,388.20	-0.24%	-0.21%	1.41%
Nifty Midcap 150	21,713.60	-0.29%	-0.36%	1.28%
Nifty Next 50	69,643.40	-0.46%	0.93%	3.11%
Nifty Smallcap 250	17,256.25	-0.52%	-0.72%	1.21%

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

Smart Beta Index

Index	23-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,759.55	-0.50%	-0.56%	0.45%
NIFTY 500 Value 50	14,525.05	0.38%	1.13%	4.70%
Nifty 200 Quality 30	20,839.60	-0.71%	-1.52%	1.63%
Nifty 50 Equal Weight	32,320.30	-0.12%	0.12%	2.52%
NIFTY Alpha Low Volatility 30	26,642.50	-0.57%	-0.99%	0.51%
Nifty High Beta 50	3,833.50	-0.29%	2.91%	6.60%
Nifty Low Volatility 50	25,158.60	-0.55%	-0.94%	0.33%
Nifty Midcap150 Momentum 50	60,901.05	-0.42%	-1.06%	-1.16%
Nifty PSE	9,863.95	0.23%	0.94%	4.15%
Nifty SME Emerge	15,562.90	0.01%	0.57%	1.60%
Nifty 100 ESG	5,024.75	-0.33%	0.14%	1.78%

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

Sector Indices

Index	23-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	27,321.95	0.62%	0.65%	7.87%
Nifty Bank	55,509.75	0.41%	0.66%	0.65%
Nifty Consumption	12,394.20	-0.79%	-0.21%	1.62%
Nifty Financial	26,559.50	0.12%	0.24%	0.92%
Nifty FMCG	55,281.55	-1.29%	-1.98%	-0.82%
Nifty Healthcare	14,659.05	-0.42%	-0.11%	-0.54%
Nifty IT	35,249.10	-0.71%	-2.66%	-0.54%
Nifty Media	1,616.55	-0.66%	-0.68%	-2.26%
Nifty Metal	10,129.05	1.00%	1.56%	8.04%
Nifty MNC	30,333.80	-0.19%	-0.54%	3.22%
Nifty Pharma	22,299.10	-0.30%	0.16%	0.15%
Nifty Realty	913.35	-0.89%	-0.22%	0.41%
Nifty Energy	35,826.20	-0.46%	1.09%	3.82%

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

Nifty 50 Top 5 Gainers

Company	23-Sep-25	Prev_Day	% Change	1 Week
IndusInd Bank	755.25	734.30	2.85	1.75
Axis Bank	1,170.80	1,144.40	2.31	5.18
JSW Steel	1,138.40	1,117.00	1.92	2.08
SBI	870.60	855.25	1.79	4.70
Maruti	16,097.00	15,816.00	1.78	3.36

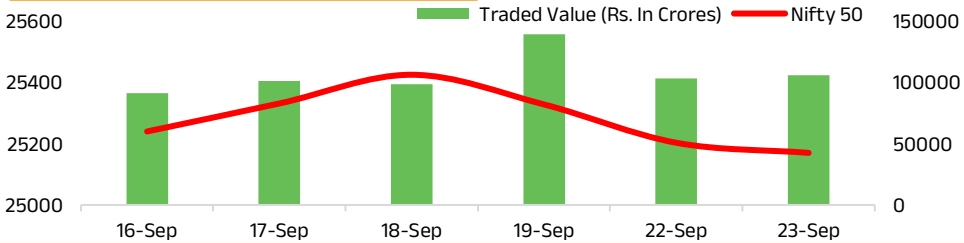
Source: NSE

Nifty 50 Top 5 Losers

Company	23-Sep-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,471.90	1505	-2.23	-3.89
SBI Life Insurance Comp	1,819.40	1858	-2.06	0.03
Britannia Industries Ltd	5,934.00	6057	-2.02	-4.33
Ultratech Cem	12,401.00	12650	-1.97	-1.41
HUL	2,522.20	2572	-1.94	-2.27

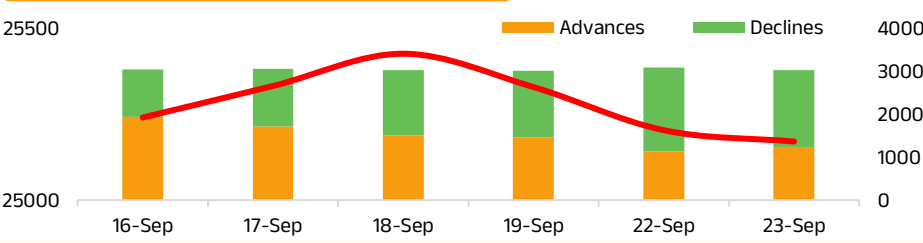
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

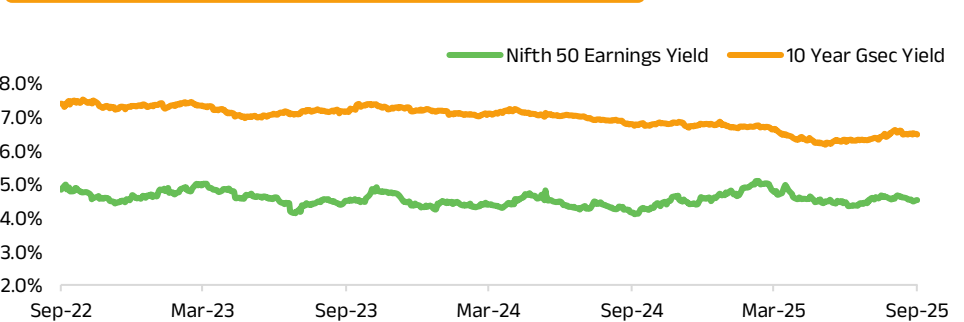
 Indian equity markets declined for the third consecutive session as investor sentiment weakened amid lingering uncertainty over India–U.S. trade negotiations. While both nations remain engaged in efforts to reach a deal.

 Accenture has proposed establishing a new campus in the southern Indian state of Andhra Pradesh, with plans to eventually create around 12,000 new jobs in its India workforce.

 Brigade Group has signed a Joint Development Agreement (JDA) to launch a residential project in Banashankari, South Bengaluru. The project carries a Gross Development Value (GDV) of approximately Rs. 1,200 crore.

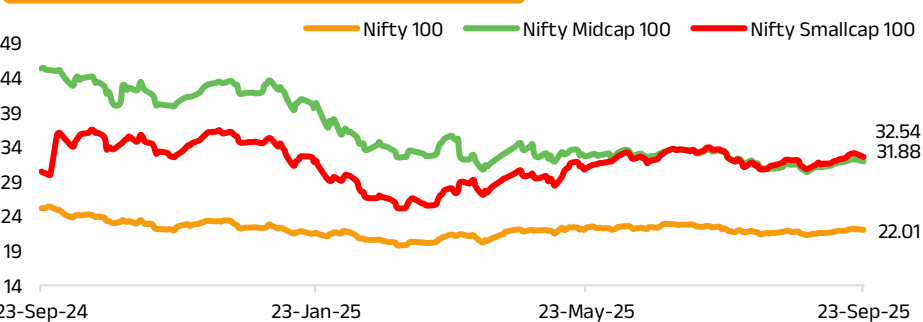
 Cochin Shipyard Limited (CSL), India's largest shipbuilding and maintenance facility, has signed an agreement with South Korea's HD Korea Shipbuilding & Offshore Engineering (HD KSOE) to collaborate on the construction of large vessels in India.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



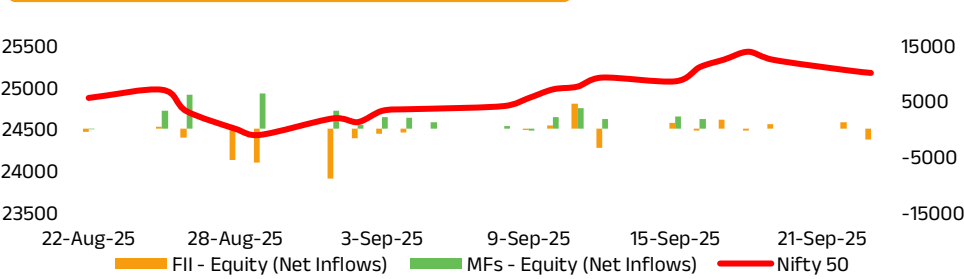
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-1971.7	-8,788	-61,522	-1,39,422
MF**	1782.22	20,818	1,38,371	3,69,439
DII	2670.87	43,578	1,99,346	5,47,821

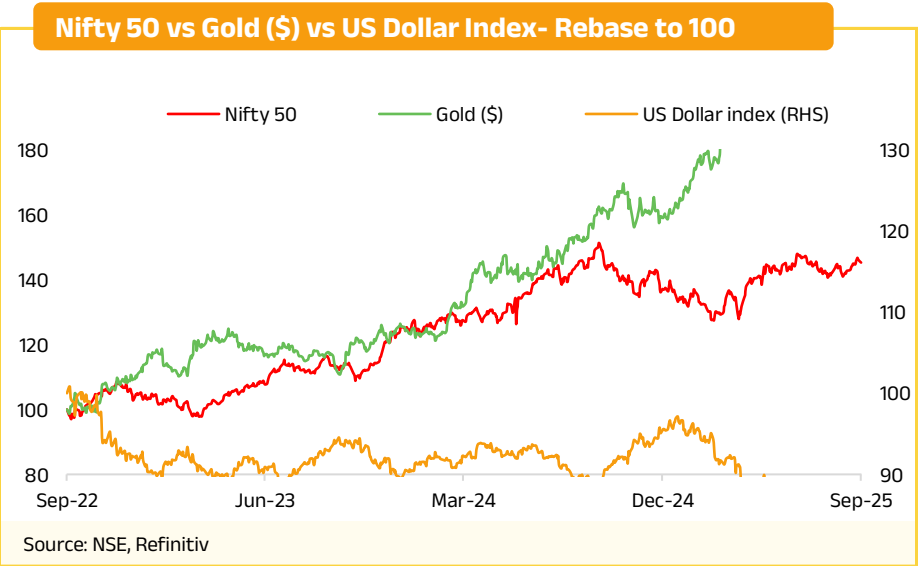
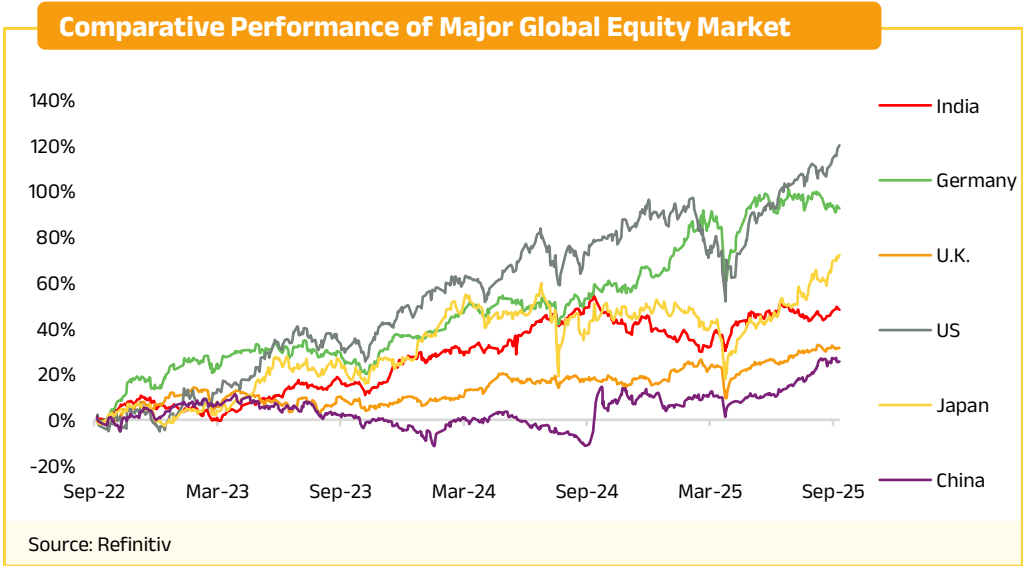
Source: SEBI, NSDL;**As on 16th Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25255.80	25277.70	-0.09%
Near Basis	86.30	75.35	14.53%
Mid Futures	25383.30	25403.40	-0.08%
Mid Basis	213.80	201.05	6.34%
Near Open Interest (Cr.)	1.44	1.48	-2.70%
Mid Open Interest (Cr.)	0.29	0.26	9.24%
Rollover (%)	19.30	17.67	9.19%
Put Call Ratio (OI)	0.86	0.72	18.51%
Put Call Ratio(Vol)	0.97	1.03	-5.72%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2740	2270	37245
Index Options	1675678	1683962	463171
Stock Futures	21879	22507	399819
Stock Options	38279	38034	31743
Total	1738576	1746772	931978
Source: NSE			

Global Equity Market				
Global Indices	23-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3643.31	-0.55%	0.73%	2.94%
Nasdaq 100 (U.S.)	24580.17	-0.73%	1.26%	4.60%
FTSE (U.K.)	9223.32	-0.04%	0.30%	-1.05%
DAX Index (Germany)	23611.33	0.36%	1.21%	-3.09%
CAC 40 Index (France)	7872.02	0.54%	0.69%	-1.23%
SSE Composite (China)	3821.83	-0.18%	-1.04%	-0.10%
Nikkei (Japan) ^[1]	45493.66	0.99%	1.32%	6.71%
Kospi (South Korea)	3486.19	0.51%	1.06%	10.02%
HangSeng (Hong Kong)	26159.12	-0.70%	-1.06%	3.24%
Strait Times (Singapore)	4302.67	0.12%	-0.81%	1.17%
Ibovespa Sao Paulo (Brazil)	146424.94	0.91%	1.64%	6.13%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8845.90	0.40%	-0.36%	-1.35%
Jakarta Composite (Indonesia)	8125.20	1.06%	2.10%	3.39%
KLSE (Malaysia)	1603.55	0.01%	0.21%	0.38%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	23-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,13,884	2.05%	3.07%	15.08%
Gold (\$/oz)	3,763.82	0.47%	2.02%	11.63%
Silver (INR/1 kg)	1,34,944	1.71%	4.66%	18.65%
Silver (\$/oz)	44.02	-0.15%	3.46%	13.37%
Brent Crude(\$/bbl)	68.57	2.15%	-0.26%	-1.94%
Crude Oil (INR/1 bbl)	5,490.00	-0.81%	-0.80%	-0.63%
NYMEX Crude(\$/bbl)	63.61	1.23%	-1.75%	-0.42%
Natural Gas (INR/1 mmbtu)	247.30	-3.02%	-4.70%	0.61%
Aluminium (INR/1 kg)	258.50	-0.58%	-1.34%	2.38%
Copper (INR/1 kg)	915.60	0.36%	-0.60%	4.08%
Nickel (INR/1 kg)	1,347.00	0.05%	-0.59%	1.78%
Lead (INR/1 kg)	189.85	2.46%	0.48%	2.15%
Zinc (INR/1 kg)	283.25	0.04%	-1.07%	4.33%
Mentha Oil (INR/1 kg)	1,038.90	1.22%	-0.51%	3.38%
Baltic Dry Index	2,200	1.29%	2.14%	13.17%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Risk Avoidance

Definition: Risk avoidance involves eliminating activities or conditions that expose the organization to risk.



Explanation

This strategy is used when the potential impact of a risk is too high to justify taking it. For example, a company may choose not to launch a product in a politically unstable region to avoid geopolitical risks. While this may limit growth opportunities, it ensures safety and stability.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.17	8.97	-3.34	15.33
Flexi Cap Fund	1.42	10.71	-3.70	16.91
Mid Cap Fund	0.75	13.46	-3.24	21.08
Large & Mid Cap Fund	1.18	11.07	-3.09	18.80
Small Cap Fund	1.42	13.24	-5.13	20.36
Multi Cap Fund	1.14	11.54	-3.06	19.40
Focused Fund	1.23	9.98	-4.15	16.53
Value Fund	1.58	9.31	-4.97	19.74
Contra Fund	0.80	9.61	-4.36	20.88
ELSS	1.25	10.90	-3.85	17.54
Equity Savings	0.63	5.55	3.91	10.11
Arbitrage Fund	0.25	2.90	6.21	6.70
Dividend Yield Fund	1.63	8.26	-5.71	20.07
Aggressive Hybrid Fund	1.18	8.64	-0.76	14.99
Balanced Advantage	0.84	6.53	0.11	12.13
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 22 Sep, 2025