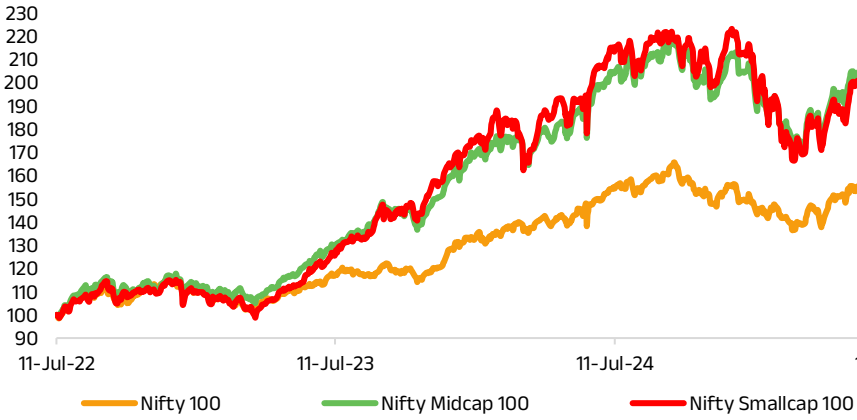


Broad Indices Historical Movement



Source: NSE

Broad Indices

	11-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,149.85	-0.81%	-1.22%	0.03%
Nifty 100	25,760.80	-0.81%	-1.17%	-0.18%
Nifty 200	14,036.60	-0.82%	-1.27%	-0.36%
Nifty 500	23,282.70	-0.80%	-1.19%	-0.24%
Nifty Large Midcap 250	16,319.40	-0.82%	-1.35%	-0.59%
Nifty Midcap 150	21,636.40	-0.83%	-1.53%	-0.96%
Nifty Next 50	67,965.55	-0.81%	-0.94%	-1.17%
Nifty Smallcap 250	17,645.45	-0.70%	-0.66%	0.66%

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

Smart Beta Index

Index	11-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,919.50	-1.05%	-1.67%	-2.17%
NIFTY 500 Value 50	14,182.95	-0.49%	-1.13%	-0.65%
Nifty 200 Quality 30	20,808.00	-0.87%	-1.37%	-0.90%
Nifty 50 Equal Weight	31,533.90	-0.72%	-1.26%	-0.05%
NIFTY Alpha Low Volatility 30	26,754.95	-0.84%	-1.46%	-0.65%
Nifty High Beta 50	3,799.50	-0.77%	-1.32%	-1.16%
Nifty Low Volatility 50	25,146.90	-0.66%	-1.02%	0.26%
Nifty Midcap150 Momentum 50	61,862.40	-1.25%	-2.36%	-2.65%
Nifty PSE	10,045.55	-0.61%	-0.63%	-0.85%
Nifty SME Emerge	15,010.75	-0.10%	0.80%	2.04%
Nifty 100 ESG	4,937.45	-0.82%	-1.31%	-0.45%

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

Sector Indices

Index	11-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,493.80	-1.77%	-2.03%	-1.31%
Nifty Bank	56,754.70	-0.35%	-0.49%	0.52%
Nifty Consumption	11,621.35	-0.90%	-1.32%	0.06%
Nifty Financial	26,853.10	-0.49%	-0.05%	0.24%
Nifty FMCG	55,910.25	0.51%	2.15%	0.16%
Nifty Healthcare	14,463.75	0.07%	-1.71%	1.03%
Nifty IT	37,693.25	-1.78%	-3.76%	-2.81%
Nifty Media	1,704.30	-1.60%	-3.26%	-1.51%
Nifty Metal	9,382.85	-0.43%	-2.06%	-1.19%
Nifty MNC	28,939.85	-0.06%	0.13%	0.95%
Nifty Pharma	22,225.90	0.68%	-0.71%	0.77%
Nifty Realty	962.90	-1.21%	-0.93%	-6.26%
Nifty Energy	36,097.85	-0.96%	-1.13%	-1.44%

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

Nifty 50 Top 5 Gainers

Company	11-Jul-25	Prev_Day	% Change	1 Week
HUL	2,519.60	2,408.40	4.62	7.71
SBI Life Insurance Company Lim	1,835.20	1,810.20	1.38	1.97
Axis Bank	1,173.80	1,164.30	0.82	-0.32
Kotak Bank	2,220.60	2,203.80	0.76	4.26
IndusInd Bank	858.85	852.85	0.70	0.30

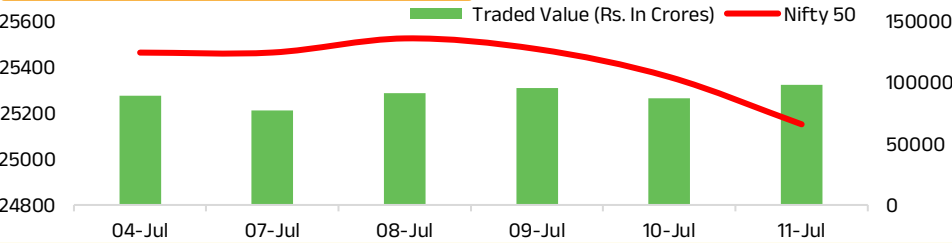
Source: NSE

Nifty 50 Top 5 Losers

Company	11-Jul-25	Prev_Day	% Change	1 Week
TCS	3,266.00	3382	-3.43	-4.50
M&M	3,073.20	3162	-2.82	-2.82
Bajaj Auto	8,067.00	8285	-2.63	-4.34
Wipro	258.30	265	-2.55	-4.35
Hero Moto	4,218.70	4321	-2.37	-2.91

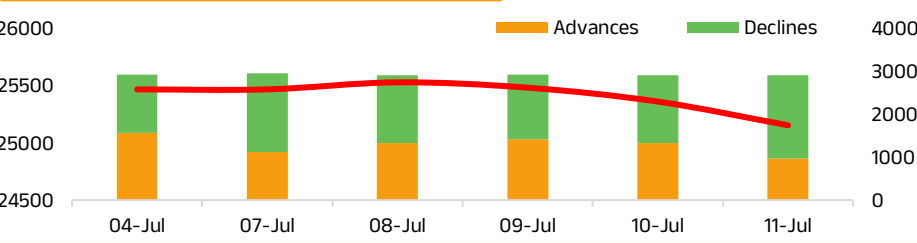
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

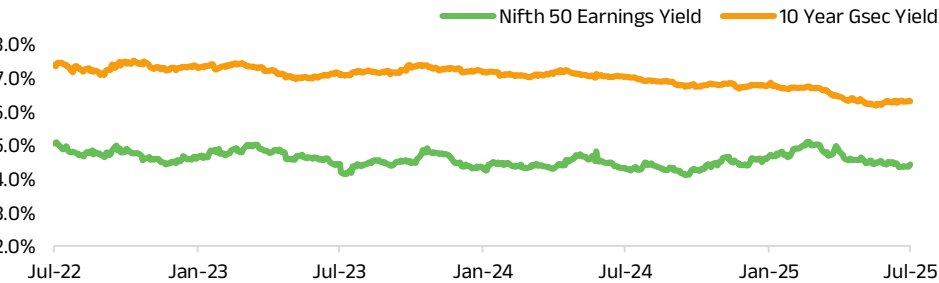
 Indian equity markets declined as intensifying global trade disputes dampened investor confidence. Fresh tariff threats from the U.S. President have undermined expectations of a swift resolution to the trade conflict, sparking fears that increased duties could fuel inflation and trigger a worldwide economic downturn.

 Adani Green Energy Ltd announced on that its operational renewable energy generation capacity increased by 45% to 15,816 MW during the Jun 2025 quarter compared to the same period last year.

 VinFast, the electric vehicle manufacturer from Vietnam, announced that it has entered into an agreement with BatX Energies for the recycling and repurposing of high voltage batteries in India.

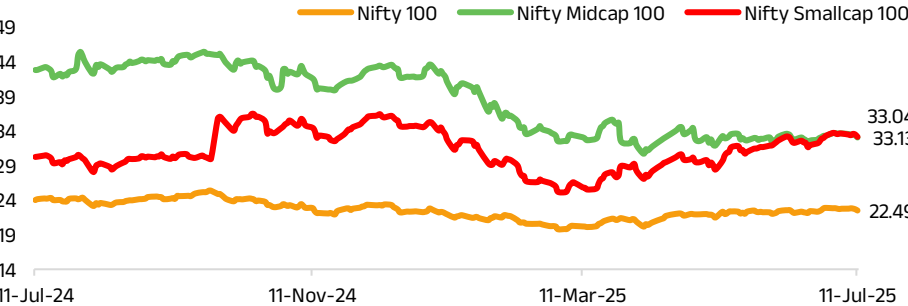
 Kinetic Green announced on its intention to broaden its operations by introducing three new e-scooters within the next 18 months. The company indicated in a statement that the first of these three products is anticipated to be released during the festive season of this year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



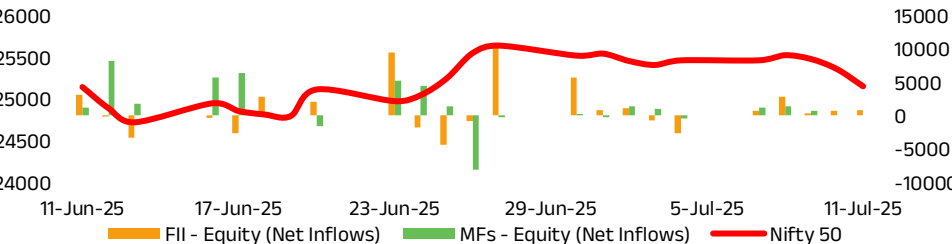
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	839.75	3,839	3,839	-74,061
MF**	710.79	4,935	4,935	237,987
DII	3558.63	12,403	12,403	360,878

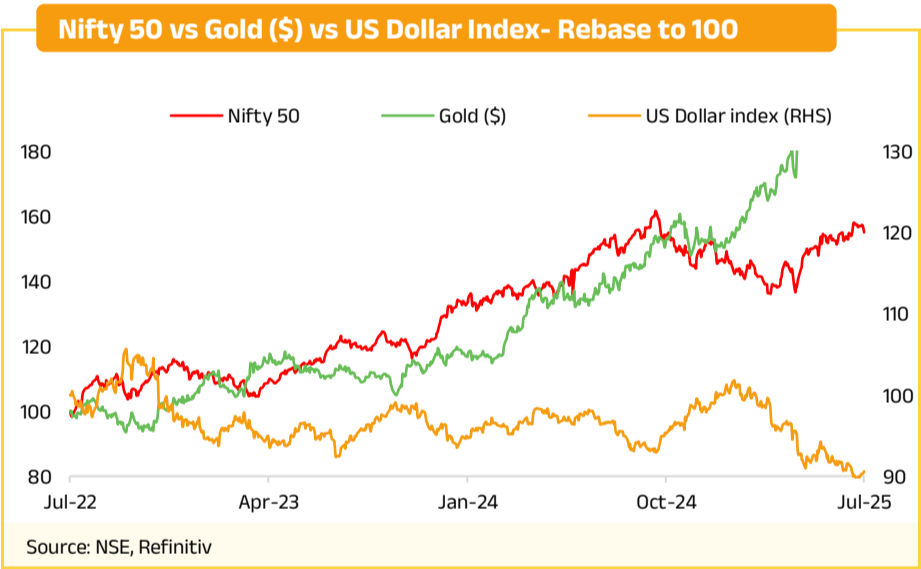
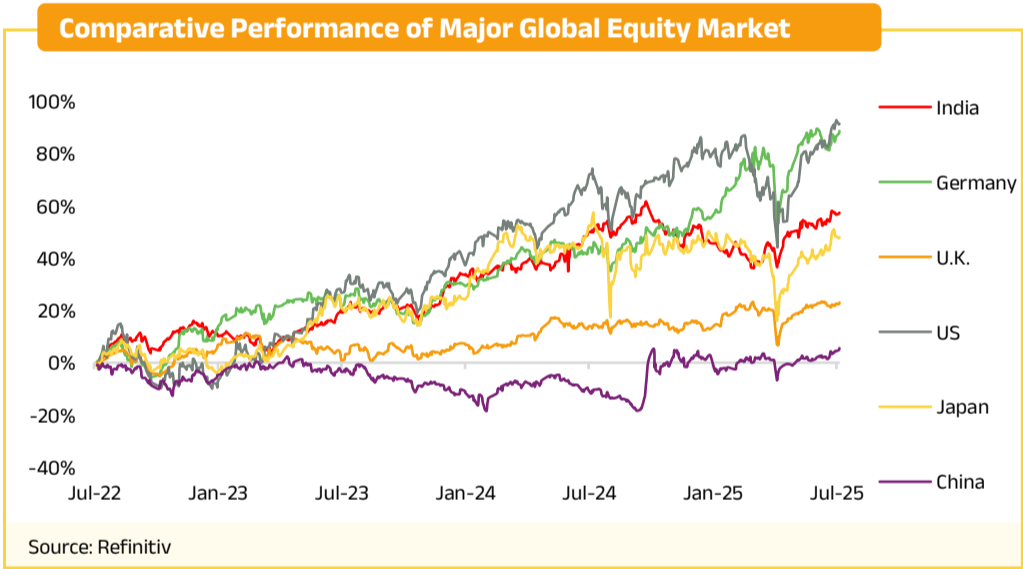
Source: SEBI, NSDL;**As on 9th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25223.40	25421.90	-0.78%
Near Basis	73.55	66.65	10.35%
Mid Futures	25327.50	25532.20	-0.80%
Mid Basis	177.65	176.95	0.40%
Near Open Interest (Cr.)	1.35	1.35	-0.11%
Mid Open Interest (Cr.)	0.39	0.38	4.82%
Rollover (%)	24.24	23.18	4.60%
Put Call Ratio (OI)	0.76	0.76	-0.33%
Put Call Ratio(Vol)	0.98	0.95	3.40%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2461	4297	32235
Index Options	2339120	2330664	223419
Stock Futures	16408	20259	386654
Stock Options	21768	18727	54531
Total	2379757	2373947	696839
Source: NSE			

Global Equity Market				
Global Indices	11-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3424.64	-0.38%	-0.38%	3.87%
Nasdaq 100 (U.S.)	22780.60	-0.21%	-0.38%	4.21%
FTSE (U.K.)	8941.12	-0.38%	1.34%	0.87%
DAX Index (Germany)	24255.31	-0.82%	1.97%	1.28%
CAC 40 Index (France)	7829.29	-0.92%	1.73%	0.69%
SSE Composite (China)	3510.18	0.01%	1.09%	3.17%
Nikkei (Japan)	39569.68	-0.19%	-0.61%	2.99%
Kospi (South Korea)	3175.77	-0.23%	3.98%	9.24%
HangSeng (Hong Kong)	24139.57	0.46%	0.93%	-0.93%
Strait Times (Singapore)	4087.81	0.30%	1.85%	4.31%
Ibovespa Sao Paulo (Brazil)	136187.31	-0.41%	-3.59%	-0.69%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8580.10	-0.11%	-0.27%	-0.14%
Jakarta Composite (Indonesia)	7047.44	0.60%	2.65%	-2.42%
KLSE (Malaysia)	1536.07	-0.03%	-0.91%	0.80%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	11-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,095	0.62%	0.50%	1.30%
Gold (\$/oz)	3,355.48	0.99%	0.57%	0.07%
Silver (INR/1 kg)	110,253	2.84%	2.78%	4.50%
Silver (\$/oz)	38.37	3.61%	3.94%	5.91%
Brent Crude(\$/bbl)	73.54	1.79%	2.61%	4.11%
Crude Oil (INR/1 bbl)	5,697.00	-2.90%	-0.56%	2.43%
NYMEX Crude(\$/bbl)	69.53	2.73%	2.20%	1.19%
Natural Gas (INR/1 mmbtu)	285.60	3.55%	-2.02%	-5.56%
Aluminium (INR/1 kg)	250.15	0.26%	0.18%	3.11%
Copper (INR/1 kg)	883.60	-0.37%	-1.29%	0.93%
Nickel (INR/1 kg)	1,322.50	-0.19%	-0.81%	-0.82%
Lead (INR/1 kg)	182.95	-0.38%	-1.11%	-0.92%
Zinc (INR/1 kg)	261.25	-0.23%	0.33%	1.93%
Mentha Oil (INR/1 kg)	931.30	-0.18%	-0.59%	-0.81%
Baltic Dry Index	1,663	13.52%	15.81%	-4.32%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Double Dip Recession

Definition: When an economy or a country’s Gross Domestic Product (GDP) growth is negative for the second time following a short period of positive growth, the phenomenon is termed as double dip recession.



Explanation

This type of pattern or movement is extremely damaging for an economy. It hits the confidence of consumers and businesses in the country. Due to this, double dip recession may sometimes lead to a prolonged period of recession before final recovery. The first recession often leads to layoffs and spending cuts, as a result of which the demand for goods and services fall, leading to the second recession.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.13	6.19	2.02	17.72
Mid Cap Fund	0.02	4.70	1.76	24.72
Large & Mid Cap Fund	0.00	5.56	2.70	21.77
Small Cap Fund	1.07	3.09	1.32	24.86
Multi Cap Fund	0.46	4.98	2.66	22.96
Focused Fund	0.02	5.56	2.33	19.10
Value Fund	0.29	5.15	0.46	23.37
Contra Fund	0.82	5.63	2.69	24.25
ELSS	0.28	5.23	1.74	20.69
Equity Savings	0.46	4.18	6.04	10.83
Arbitrage Fund	0.55	3.21	6.72	6.70
Dividend Yield Fund	0.04	4.90	-0.71	22.72
Aggressive Hybrid Fund	0.25	5.49	3.89	17.09
Balanced Advantage	0.29	4.67	3.80	13.62
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.				