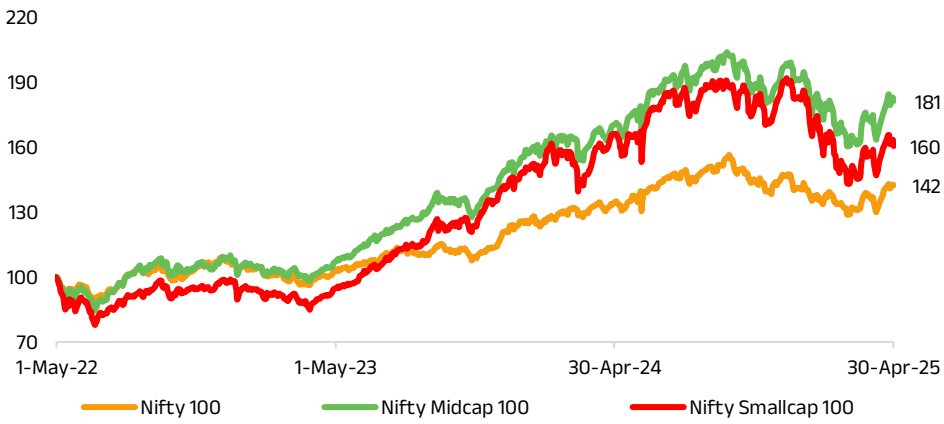


Broad Indices Historical Movement



Source: NSE

Broad Indices

	30-Apr-25	1 Day	1 Week	1 Month
Nifty 50	24,334.20	-0.01%	0.36%	5.04%
Nifty 100	24,843.80	-0.11%	-0.07%	4.77%
Nifty 200	13,438.15	-0.23%	-0.31%	4.91%
Nifty 500	22,030.05	-0.37%	-0.68%	4.55%
Nifty Large Midcap 250	15,355.15	-0.40%	-0.84%	4.87%
Nifty Midcap 150	19,873.15	-0.68%	-1.59%	4.97%
Nifty Next 50	64,508.85	-0.59%	-2.11%	3.43%
Nifty Smallcap 250	15,359.45	-1.79%	-3.49%	2.19%

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

Smart Beta Index

Index	30-Apr-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,270.60	-0.33%	-0.21%	5.84%
NIFTY 500 Value 50	13,437.85	-0.84%	-1.85%	1.02%
Nifty 200 Quality 30	19,791.95	-0.47%	-0.47%	4.44%
Nifty 50 Equal Weight	30,209.55	-0.21%	-0.71%	4.15%
NIFTY Alpha Low Volatility 30	26,230.00	0.07%	-0.39%	5.66%
Nifty High Beta 50	3,432.60	-1.27%	-3.23%	3.29%
Nifty Low Volatility 50	24,615.70	0.21%	-0.27%	5.70%
Nifty Midcap150 Momentum 50	57,721.15	-0.67%	-1.10%	5.61%
Nifty PSE	9,559.00	-0.78%	-1.65%	2.74%
Nifty SME Emerge	13,591.56	-1.80%	-3.64%	5.25%
Nifty 100 ESG	4,716.05	-0.24%	-1.06%	4.34%

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

Sector Indices

Index	30-Apr-25	1 Day	1 Week	1 Month
Nifty Auto	22,308.40	0.04%	-0.26%	5.05%
Nifty Bank	55,087.15	-0.55%	-0.21%	8.38%
Nifty Consumption	11,316.55	0.07%	-1.04%	6.14%
Nifty Financial	26,113.55	-0.31%	-0.73%	6.46%
Nifty FMCG	56,445.35	-0.05%	-0.78%	6.30%
Nifty Healthcare	14,053.60	0.44%	-0.84%	4.29%
Nifty IT	35,794.95	-0.35%	1.38%	-0.52%
Nifty Media	1,513.90	-2.18%	-5.35%	0.37%
Nifty Metal	8,581.80	-0.29%	-1.96%	-4.82%
Nifty MNC	27,015.70	0.39%	-0.76%	4.17%
Nifty Pharma	21,772.45	0.44%	-0.92%	4.82%
Nifty Realty	885.85	1.91%	0.19%	7.40%
Nifty Energy	34,241.60	-0.57%	-1.40%	2.86%

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

Nifty 50 Top 5 Gainers

Company	30-Apr-25	Prev_Day	% Change	1 Week
HDFC Standard Life Ins Co Ltd.	743.70	715.05	4.01	4.98
Maruti	12,257.00	11,841.00	3.51	3.05
Bharti Airtel	1,864.50	1,823.80	2.23	1.02
SBI Life Insurance Company Lim	1,765.80	1,730.10	2.06	9.80
Indian Oil	137.86	135.78	1.53	-0.38

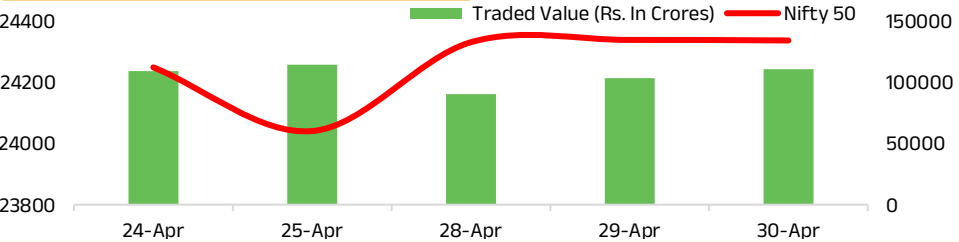
Source: NSE

Nifty 50 Top 5 Losers

Company	30-Apr-25	Prev_Day	% Change	1 Week
Bajaj Finance	8,634.50	9093	-5.04	-7.17
Tata Motors	644.25	666	-3.21	-3.61
SBI	788.65	813	-2.94	-3.04
Ultratech Cem	11,641.00	11869	-1.92	-4.26
Shree Cements Limited	29,710.00	30025	-1.05	-3.24

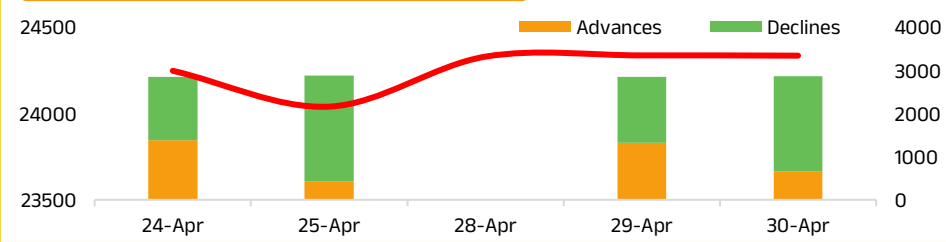
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

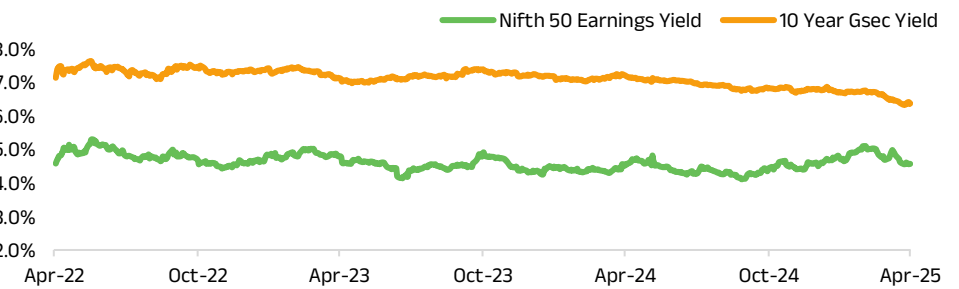
Indian equity markets fluctuated before closing slightly lower due to trade uncertainties and rising border tensions with Pakistan. The Indian Prime Minister authorized military chiefs to respond to a recent militant attack in Kashmir. Meanwhile, Pakistan claimed to have evidence of India's imminent military action. These developments made investors cautious ahead of the stock market holiday.

Adani Ports announced a 50% YoY increase in its consolidated net profit, reaching Rs. 3,023 crore for the fourth quarter ending Mar 2024, compared to Rs. 2,025 crore recorded during the same quarter of the previous year.

Vedanta Ltd experienced a significant increase in consolidated net profit, rising by 154.4% to Rs.3,483 crore in the fourth quarter of the FY25, compared to the corresponding quarter of the previous year. This growth was attributed to increased volumes and a reduced cost base.

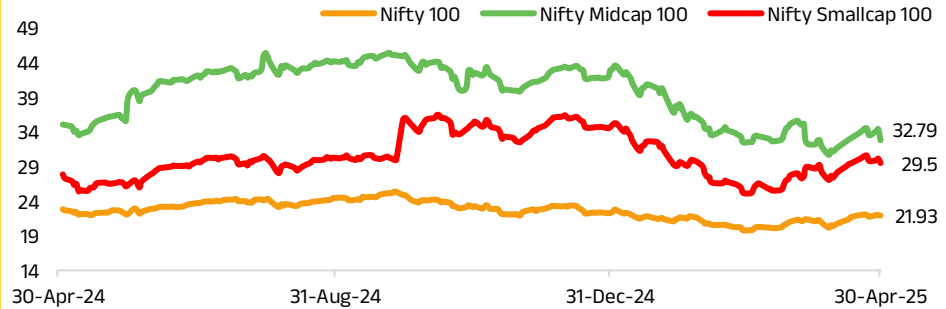
Home First Finance, a mortgage lender, has announced a 25.4% YoY increase in its net profit for the fourth quarter ending Mar 2025, reaching Rs. 105 crore, compared to Rs. 83 crore during the same period last year, supported by a 31% growth in assets under management, totaling Rs. 12,713 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



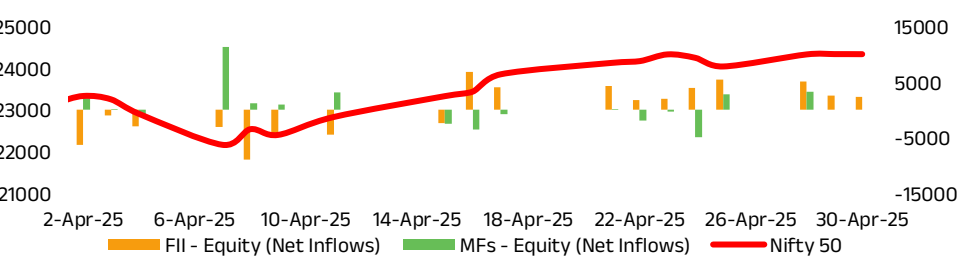
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	YTD
FII*	2351.23		4,223	-112,351
MF**	3307.5		13,928	126,060
DII*	1792.15		28,228	214,112

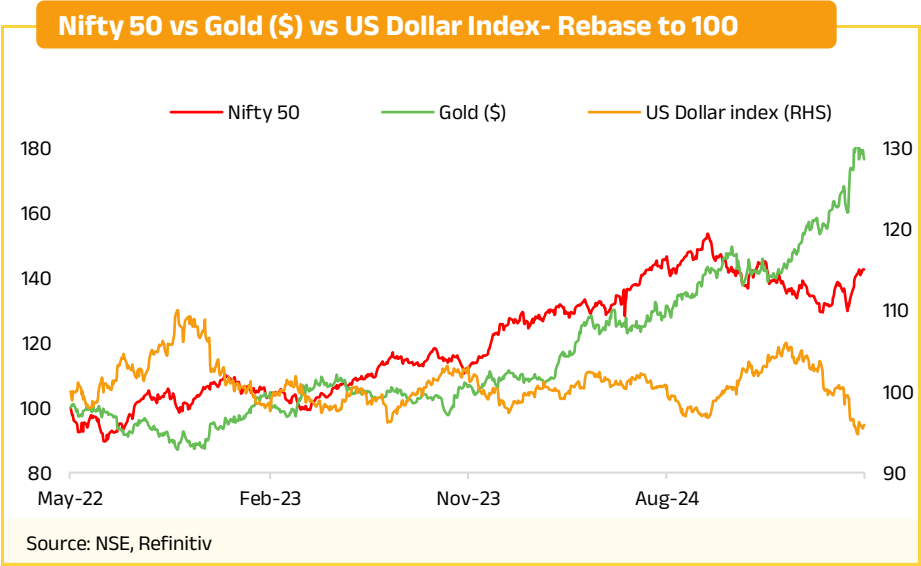
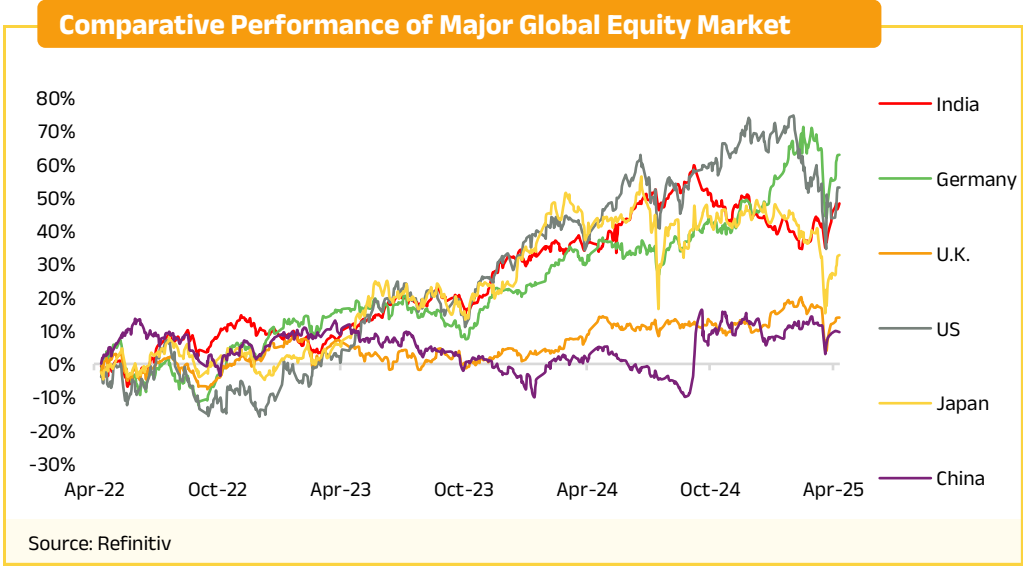
Source: SEBI, NSDL;*As on 30th Apr 2025;**As on 28th Apr 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24418.40	24418.40	0.00%
Near Basis	84.20	84.20	0.00%
Mid Futures	24520.50	24520.50	0.00%
Mid Basis	186.30	186.30	0.00%
Near Open Interest (Cr.)	1.33	1.33	0.00%
Mid Open Interest (Cr.)	0.16	0.16	0.00%
Rollover (%)	11.61	11.61	0.00%
Put Call Ratio (OI)	1.07	0.94	13.86%
Put Call Ratio(Vol)	1.02	0.93	10.04%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3711	2802	26944
Index Options	2586043	2626406	518266
Stock Futures	17058	17274	368461
Stock Options	47476	47721	51689
Total	2654288	2694204	965360
Source: NSE			

Global Equity Market				
Global Indices	1-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3064.26	0.61%	2.12%	-0.48%
Nasdaq 100 (U.S.)	19786.71	1.10%	2.98%	1.80%
FTSE (U.K.)	8496.80	0.02%	1.06%	-1.60%
DAX Index (Germany) ^[1]	22496.98	0.32%	1.96%	-0.19%
CAC 40 Index (France) ^[1]	7593.87	0.50%	1.21%	-3.59%
SSE Composite (China) ^[1]	3279.03	-0.23%	-0.55%	-2.07%
Nikkei (Japan)	36452.30	1.13%	4.03%	2.32%
Kospi (South Korea) ^[1]	2556.61	-0.34%	1.36%	1.40%
HangSeng (Hong Kong) ^[1]	22119.41	0.51%	0.96%	-4.69%
Strait Times (Singapore) ^[1]	3832.51	0.72%	0.02%	-3.44%
Ibovespa Sao Paulo (Brazil) ^[1]	135066.97	-0.02%	0.36%	2.99%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8145.60	0.24%	2.23%	2.78%
Jakarta Composite (Indonesia) ^[1]	6766.80	0.26%	2.32%	3.93%
KLSE (Malaysia) ^[1]	1540.22	1.63%	2.24%	1.76%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	1-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm) ^[1]	93,928	-1.71%	-1.87%	3.45%
Gold (\$/oz)	3,240.29	-1.44%	-3.22%	4.17%
Silver (INR/1 kg) ^[1]	93,975	-3.49%	-3.55%	-5.61%
Silver (\$/oz)	32.40	-0.58%	-3.48%	-3.96%
Brent Crude(\$/bbl)	61.89	-5.15%	-11.95%	-20.92%
Crude Oil (INR/1 bbl) ^[1]	5,148.00	-2.63%	-3.23%	300.81%
NYMEX Crude(\$/bbl)	60.39	1.75%	-4.82%	-15.55%
Natural Gas (INR/1 mmbtu)	288.50	1.30%	11.74%	-18.16%
Aluminium (INR/1 kg) ^[1]	234.80	-0.93%	-0.19%	-5.13%
Copper (INR/1 kg) ^[1]	838.85	-2.13%	-1.93%	-6.56%
Nickel (INR/1 kg) ^[1]	1,351.50	0.07%	-1.10%	-3.71%
Lead (INR/1 kg) ^[1]	181.85	-0.90%	1.85%	-1.25%
Zinc (INR/1 kg) ^[1]	251.85	-1.24%	-1.35%	-7.66%
Mentha Oil (INR/1 kg) ^[1]	995.40	-0.07%	0.63%	-0.37%
Baltic Dry Index ^[1]	1,386	-0.86%	2.44%	-12.67%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Income shares

Definition: These are a class of capital shares which are offered by a dual-purpose fund that has little room for capital appreciation but gives the holder a portion of all income earned in the portfolio.



Explanation

Investors that own income shares receive dividends from the entire fund's performance. Those who invest in this class of stock are typically looking for steady income in the form of dividends instead of capital gains. An income share carries lower risk than a capital share. The fund's two kinds of potential cash flows allow individual investors to choose classes that are more in line with their investment objectives.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	4.35	-1.43	6.66	14.53
Mid Cap Fund	3.81	-6.66	6.29	19.11
Large & Mid Cap Fund	3.93	-4.15	6.83	17.10
Small Cap Fund	2.01	-12.25	1.36	17.52
Multi Cap Fund	3.50	-5.66	4.98	18.10
Focused Fund	4.10	-3.87	6.08	15.15
Value Fund	3.54	-5.61	4.44	18.63
Contra Fund	4.03	-4.06	6.93	20.36
ELSS	4.05	-5.35	4.72	15.94
Equity Savings	1.97	1.84	7.54	9.42
Arbitrage Fund	0.69	3.52	7.08	6.50
Dividend Yield Fund	3.15	-5.25	4.68	18.32
Aggressive Hybrid Fund	3.55	-1.54	7.38	13.81
Balanced Advantage	2.80	-0.30	6.18	11.47
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 30 Apr, 2025

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