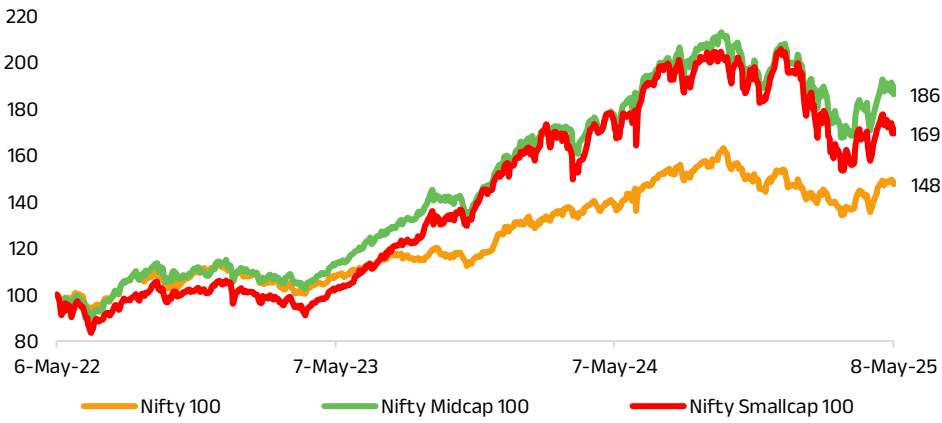


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-May-25	1 Day	1 Week	1 Month
Nifty 50	24,273.80	-0.58%	-0.25%	7.71%
Nifty 100	24,678.00	-0.84%	-0.67%	6.93%
Nifty 200	13,326.75	-1.02%	-0.83%	6.91%
Nifty 500	21,843.05	-1.04%	-0.85%	6.65%
Nifty Large Midcap 250	15,195.00	-1.30%	-1.04%	6.74%
Nifty Midcap 150	19,591.80	-1.76%	-1.42%	6.55%
Nifty Next 50	62,760.25	-2.14%	-2.71%	3.21%
Nifty Smallcap 250	15,180.45	-1.19%	-1.17%	4.70%

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

Smart Beta Index

Index	8-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,072.25	-1.37%	-0.68%	9.37%
NIFTY 500 Value 50	13,229.35	-1.71%	-1.55%	4.67%
Nifty 200 Quality 30	19,604.95	-0.99%	-0.94%	5.88%
Nifty 50 Equal Weight	29,964.80	-0.91%	-0.81%	6.35%
NIFTY Alpha Low Volatility 30	25,854.00	-1.34%	-1.43%	5.55%
Nifty High Beta 50	3,337.05	-2.15%	-2.78%	3.59%
Nifty Low Volatility 50	24,264.80	-1.06%	-1.43%	5.45%
Nifty Midcap150 Momentum 50	56,843.00	-1.65%	-1.52%	7.19%
Nifty PSE	9,337.85	-1.74%	-2.31%	3.11%
Nifty SME Emerge	13,241.83	-0.78%	-2.57%	2.66%
Nifty 100 ESG	4,680.05	-1.12%	-0.76%	6.28%

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

Sector Indices

Index	8-May-25	1 Day	1 Week	1 Month
Nifty Auto	22,674.15	-1.90%	1.64%	12.59%
Nifty Bank	54,365.65	-0.45%	-1.31%	7.63%
Nifty Consumption	11,227.15	-1.59%	-0.79%	5.37%
Nifty Financial	25,980.65	-0.71%	-0.51%	6.91%
Nifty FMCG	56,020.70	-1.01%	-0.75%	3.17%
Nifty Healthcare	13,696.75	-1.95%	-2.54%	3.26%
Nifty IT	36,002.45	0.23%	0.58%	8.30%
Nifty Media	1,527.05	0.20%	0.87%	1.98%
Nifty Metal	8,428.40	-2.09%	-1.79%	5.81%
Nifty MNC	26,790.55	-1.20%	-0.83%	5.59%
Nifty Pharma	21,115.05	-1.62%	-3.02%	3.62%
Nifty Realty	843.80	-2.47%	-4.75%	6.08%
Nifty Energy	33,534.75	-1.51%	-2.06%	5.23%

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

Nifty 50 Top 5 Gainers

Company	8-May-25	Prev_Day	% Change	1 Week
HCL Tech	1,580.70	1,563.30	1.11	0.84
Axis Bank	1,172.20	1,161.30	0.94	-1.08
Titan Industries Limited	3,369.30	3,338.90	0.91	-0.31
Kotak Bank	2,112.60	2,094.90	0.84	-4.33
Britannia Industries Limited	5,391.00	5,351.00	0.75	-0.88

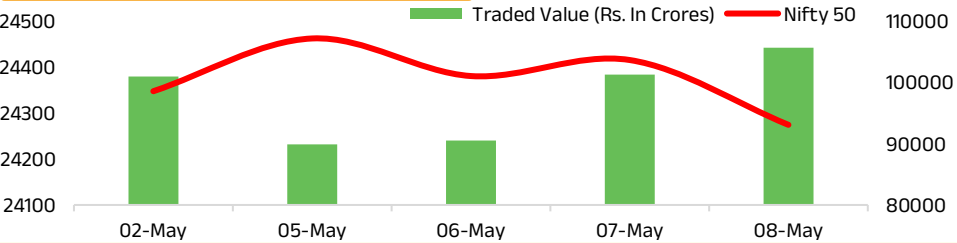
Source: NSE

Nifty 50 Top 5 Losers

Company	8-May-25	Prev_Day	% Change	1 Week
United Phos	656.50	688	-4.58	-2.00
Divi's Lab	5,960.50	6148	-3.05	-2.08
BPCL	307.95	317	-2.82	-0.68
M&M	3,033.10	3120	-2.78	3.56
Tata Beverages	1,116.00	1146	-2.62	-4.27

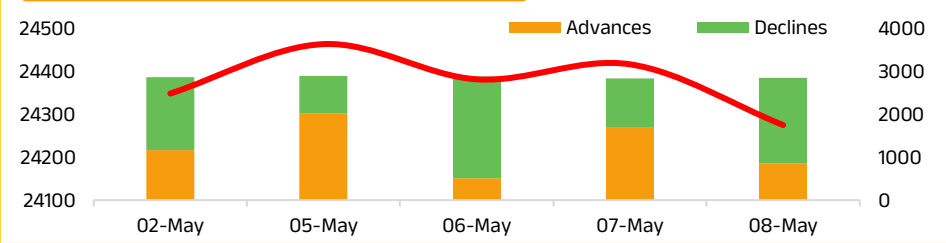
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

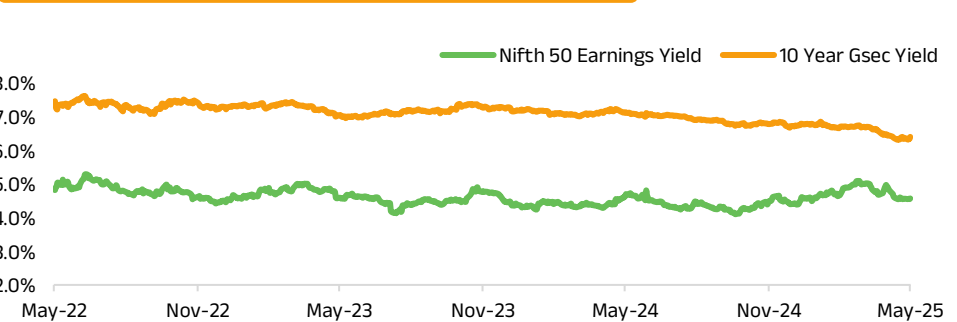
Indian equity markets fell due to rising tensions between India and Pakistan after India announced strikes on Pakistani air defense radars. This increased market uncertainty, with fears of a major conflict between the nuclear-armed nations. Consequently, profit-taking occurred across almost all sectors, except for the information technology sector, which remained relatively stable.

Hindustan Construction Company (HCC) announced a significant decrease of 63.37% in its consolidated net profit, amounting to Rs. 90.08 crore for the fourth quarter ending Mar 2025, down from Rs. 245.23 crore in the same quarter of the previous year. The total income for the reviewed quarter was Rs. 1,392.20 crore, a decline from Rs. 1,813.05 crore reported a year earlier.

Coal India plans to establish clean energy initiatives totaling approximately 4.5 gigawatts, with an investment of Rs. 25,000 crore (around \$3 billion), in its pursuit of net zero carbon emissions from its operations by 2070.

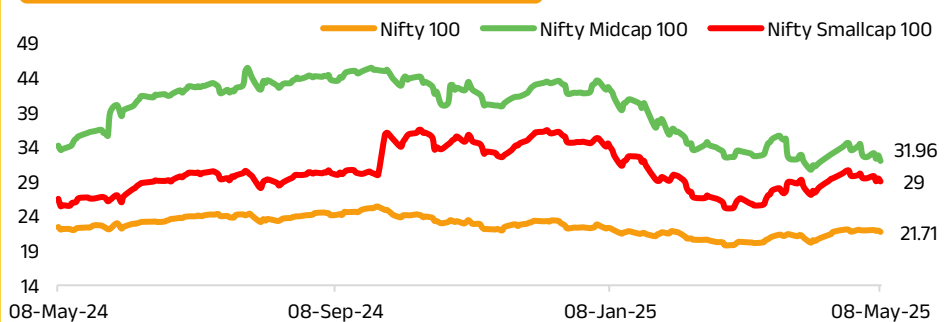
Brigade Group has announced the acquisition of an 11-acre land parcel located opposite ITPL in Whitefield, Bengaluru. This land is set to be transformed into a commercial project featuring a gross leasable area of 1.5 million square feet and a gross development value (GDV) exceeding Rs. 2,000 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



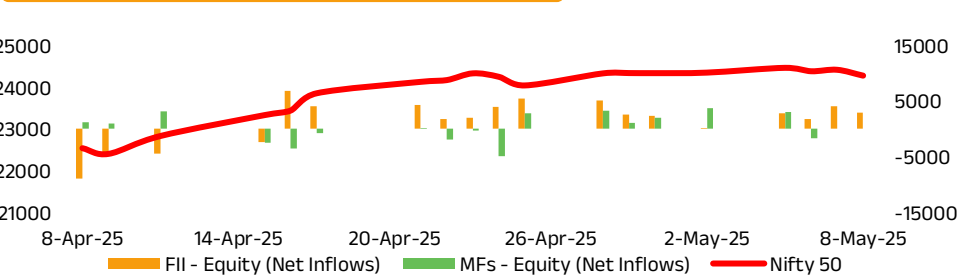
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	2951.95	11,739	15,963	-100,611
MF**	-1671.13	5,072	22,115	134,247
DII	-596.25	6,464	34,692	220,576

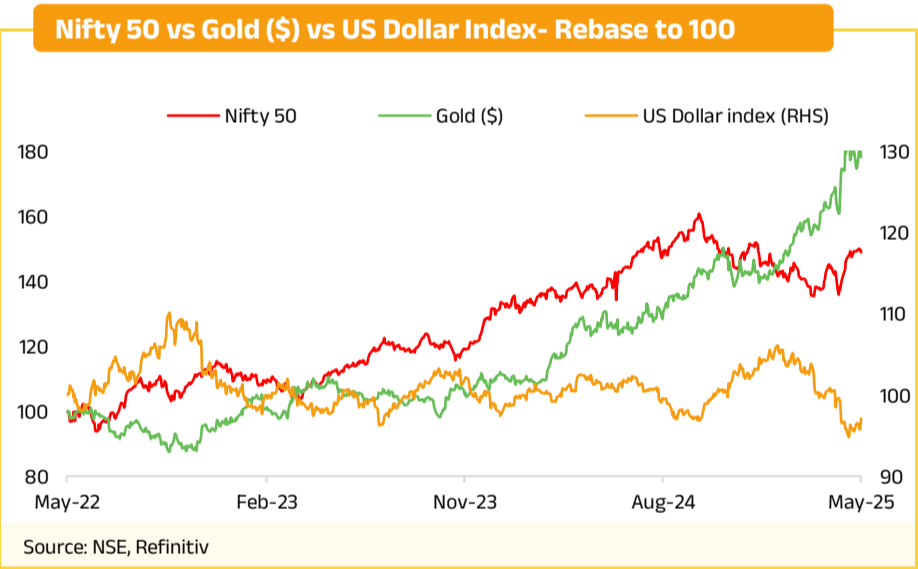
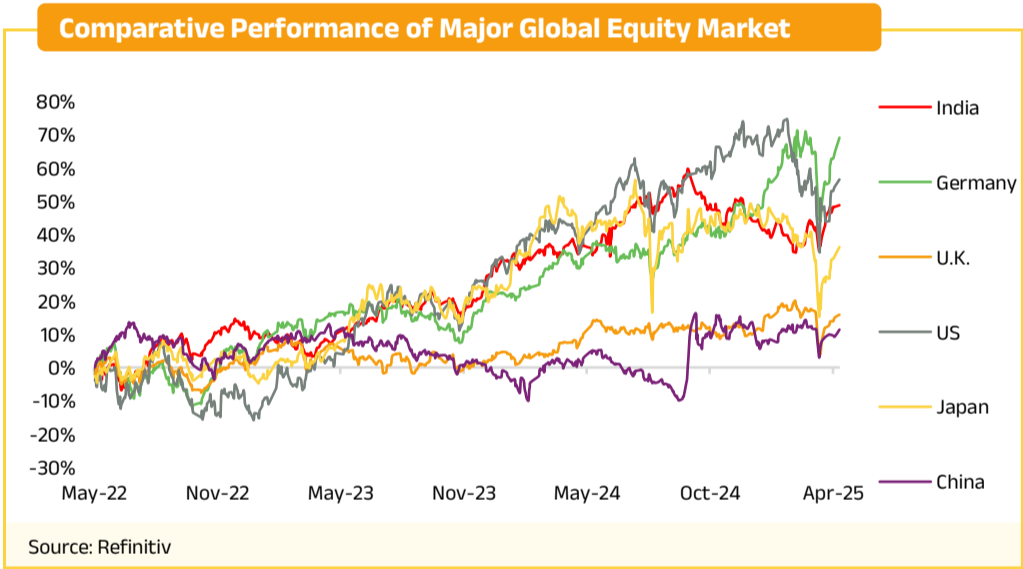
Source: SEBI, NSDL;**As on 6th May 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24271.90	24461.40	-0.77%
Near Basis	-1.90	47.00	-104.04%
Mid Futures	24362.60	24570.30	-0.85%
Mid Basis	88.80	155.90	-43.04%
Near Open Interest (Cr.)	1.28	1.32	-2.91%
Mid Open Interest (Cr.)	0.19	0.17	9.20%
Rollover (%)	14.48	13.23	9.42%
Put Call Ratio (OI)	1.00	0.97	3.39%
Put Call Ratio(Vol)	1.23	0.82	50.36%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3832	3363	14186
Index Options	1509705	1515599	290726
Stock Futures	20899	18763	252029
Stock Options	61288	58927	32170
Total	1595725	1596652	589109
Source: NSE			

Global Equity Market				
Global Indices	8-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3102.77	0.68%	1.26%	14.07%
Nasdaq 100 (U.S.)	20063.56	0.98%	1.40%	17.40%
FTSE (U.K.)	8531.61	-0.32%	0.41%	7.85%
DAX Index (Germany)	23352.69	1.02%	3.80%	15.15%
CAC 40 Index (France)	7694.44	0.89%	1.32%	8.37%
SSE Composite (China)	3352.00	0.28%	2.23%	6.56%
Nikkei (Japan)	36928.63	0.41%	1.31%	11.86%
Kospi (South Korea)	2579.48	0.22%	0.89%	10.51%
HangSeng (Hong Kong)	22775.92	0.37%	2.97%	13.16%
Strait Times (Singapore)	3848.22	-0.44%	0.41%	10.92%
Ibovespa Sao Paulo (Brazil)	136231.90	2.12%	0.86%	9.92%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8191.70	0.16%	0.57%	9.08%
Jakarta Composite (Indonesia)	6827.75	-1.42%	0.90%	13.87%
KLSE (Malaysia)	1542.74	-0.46%	0.16%	6.87%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	8-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,664	-0.54%	2.91%	9.79%
Gold (\$/oz)	3,305.25	-1.76%	2.00%	10.77%
Silver (INR/1 kg)	95,343	-0.15%	1.46%	6.12%
Silver (\$/oz)	32.49	0.06%	0.28%	8.88%
Brent Crude(\$/bbl)	61.95	0.24%	0.10%	-7.16%
Crude Oil (INR/1 bbl)	4,911.00	-1.70%	-4.60%	-5.72%
NYMEX Crude(\$/bbl)	61.05	3.09%	1.09%	1.85%
Natural Gas (INR/1 mmbtu)	306.20	4.58%	6.14%	-2.36%
Aluminium (INR/1 kg)	231.75	-0.47%	-1.30%	-1.13%
Copper (INR/1 kg)	848.80	-0.19%	1.19%	4.55%
Nickel (INR/1 kg)	1,331.30	-1.08%	-1.49%	3.69%
Lead (INR/1 kg)	184.25	0.22%	1.32%	2.73%
Zinc (INR/1 kg)	251.00	0.38%	-0.34%	-0.61%
Mentha Oil (INR/1 kg)	990.50	0.06%	-0.49%	1.12%
Baltic Dry Index ^[1]	1,374	-2.28%	-2.62%	2.38%
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	6.04	-2.14	7.09	15.89
Mid Cap Fund	6.30	-7.59	6.41	20.69
Large & Mid Cap Fund	6.08	-4.98	7.09	18.50
Small Cap Fund	4.65	-12.58	2.55	19.07
Multi Cap Fund	5.80	-6.52	5.62	19.42
Focused Fund	5.82	-4.50	6.64	16.53
Value Fund	5.56	-6.35	4.79	19.81
Contra Fund	6.05	-4.76	7.57	21.59
ELSS	6.09	-5.84	5.29	17.40
Equity Savings	2.39	1.63	7.87	9.95
Arbitrage Fund	0.65	3.40	7.16	6.56
Dividend Yield Fund	5.51	-5.94	4.78	19.07
Aggressive Hybrid Fund	5.02	-1.90	7.78	14.92
Balanced Advantage	3.76	-0.83	6.45	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 07 May, 2025