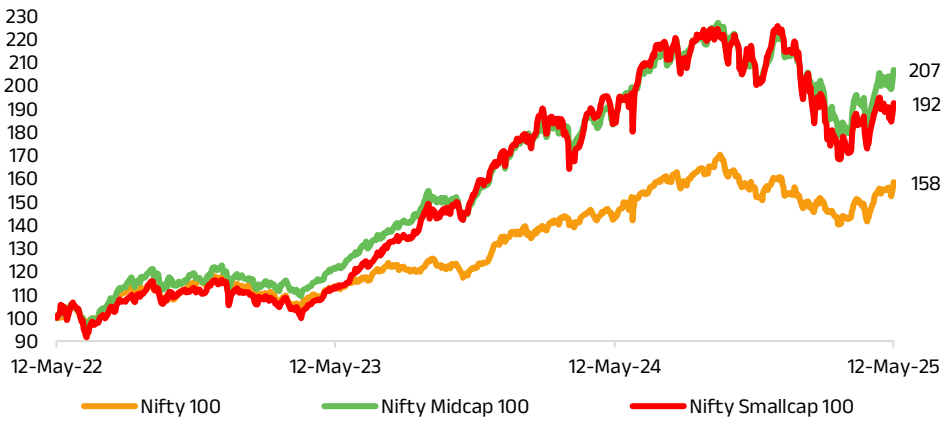


Broad Indices Historical Movement



Source: NSE

Broad Indices

	12-May-25	1 Day	1 Week	1 Month
Nifty 50	24,924.70	3.82%	1.90%	9.18%
Nifty 100	25,381.40	3.86%	1.48%	8.61%
Nifty 200	13,733.80	3.90%	1.46%	8.79%
Nifty 500	22,511.40	3.86%	1.42%	8.47%
Nifty Large Midcap 250	15,698.40	3.81%	1.45%	8.92%
Nifty Midcap 150	20,331.50	3.75%	1.41%	9.23%
Nifty Next 50	65,078.55	4.08%	-0.50%	5.86%
Nifty Smallcap 250	15,684.20	4.00%	1.00%	6.07%

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

Smart Beta Index

Index	12-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,093.10	4.21%	1.60%	12.18%
NIFTY 500 Value 50	13,710.50	3.59%	0.75%	6.69%
Nifty 200 Quality 30	20,323.40	3.77%	2.03%	7.83%
Nifty 50 Equal Weight	30,837.75	3.63%	1.57%	7.88%
NIFTY Alpha Low Volatility 30	26,436.45	2.79%	0.48%	6.98%
Nifty High Beta 50	3,504.20	5.06%	0.14%	7.81%
Nifty Low Volatility 50	24,863.65	2.98%	1.14%	6.31%
Nifty Midcap150 Momentum 50	59,201.45	4.47%	1.56%	10.30%
Nifty PSE	9,618.00	3.61%	-0.20%	4.13%
Nifty SME Emerge	13,617.31	3.56%	-0.48%	3.26%
Nifty 100 ESG	4,825.80	3.92%	1.44%	8.55%

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

Sector Indices

Index	12-May-25	1 Day	1 Week	1 Month
Nifty Auto	23,400.45	3.41%	3.09%	13.88%
Nifty Bank	55,382.85	3.34%	0.84%	8.59%
Nifty Consumption	11,536.80	3.49%	0.77%	6.20%
Nifty Financial	26,497.60	3.90%	1.27%	7.91%
Nifty FMCG	57,101.40	2.64%	0.29%	2.44%
Nifty Healthcare	13,765.50	0.68%	-2.35%	3.29%
Nifty IT	38,282.55	6.70%	6.37%	16.93%
Nifty Media	1,590.10	3.18%	3.85%	5.74%
Nifty Metal	8,914.25	5.86%	3.65%	9.13%
Nifty MNC	27,550.15	2.99%	1.65%	6.36%
Nifty Pharma	21,102.70	0.15%	-3.09%	3.13%
Nifty Realty	872.60	5.93%	-1.66%	10.43%
Nifty Energy	34,734.30	4.19%	0.44%	7.17%

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

Nifty 50 Top 5 Gainers

Company	12-May-25	Prev_Day	% Change	1 Week
Infosys	1,626.90	1,507.60	7.91	7.84
HCL Tech	1,670.30	1,569.40	6.43	6.48
Wipro	257.28	242.01	6.31	5.63
Tech Mahindra	1,573.10	1,493.70	5.32	5.25
TCS	3,620.40	3,440.30	5.24	4.81

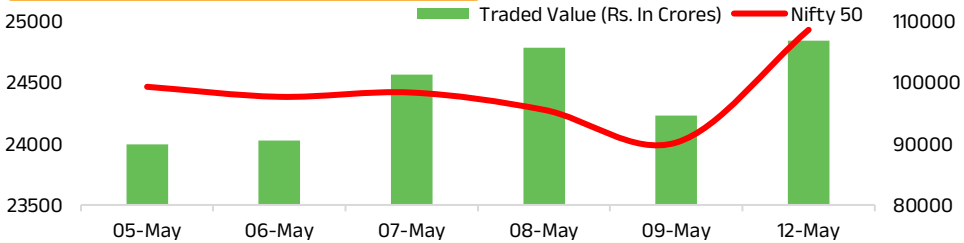
Source: NSE

Nifty 50 Top 5 Losers

Company	12-May-25	Prev_Day	% Change	1 Week
IndusInd Bank	788.50	818	-3.63	-6.88
Sun Pharma	1,686.20	1745	-3.36	-8.19
Divi's Lab	5,942.00	6026	-1.39	-2.98
NA	NA	NA	NA	NA
NA	NA	NA	NA	NA

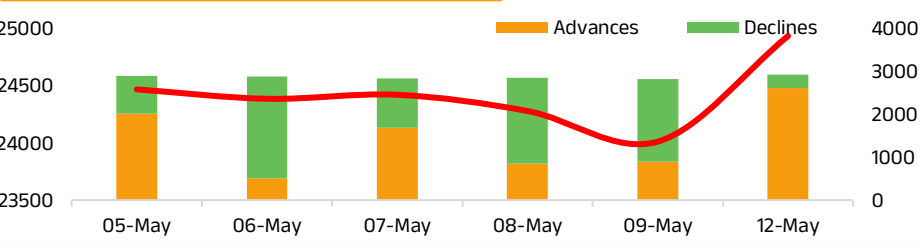
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

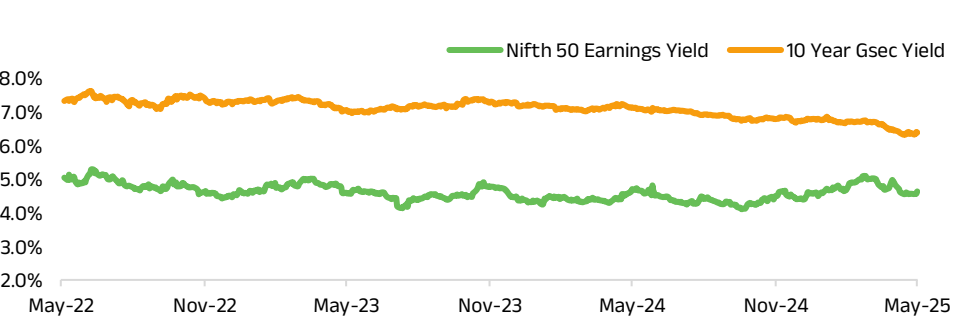
Indian equity markets surged as easing geopolitical and trade tensions increased investors' appetite for risk. Additionally, market sentiment improved as tensions between India and Pakistan eased after both countries agreed to cease all military actions on land, air, and sea, effective immediately from May 10th, 2025.

KEC International, the leading entity of the RPG Group, has obtained new contracts worth Rs. 1,034 crore in both domestic and international markets. These contracts span the transmission and distribution (T&D), civil, and cables sectors.

VVIP Group plans to allocate approximately Rs. 800 crore for the development of a luxury residential project in Greater Noida. This initiative will feature over 350 high-end residential units in a single-phase development, covering an area of 5 acres. The company is offering units priced between Rs. 3.49 crore and Rs. 6 crore.

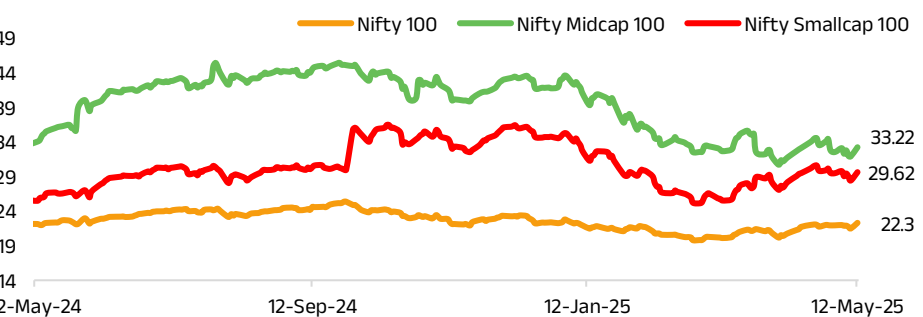
Tata Electronics is set to substantially increase its production capacity for Apple iPhone enclosures at its facility in Hosur, Tamil Nadu, with plans to double its current output of approximately 50,000 enclosures.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



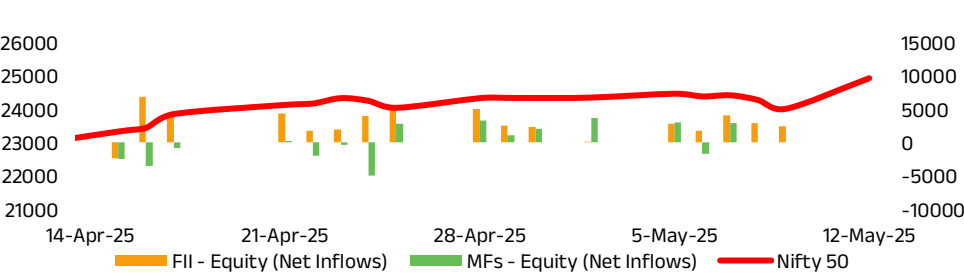
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	2427.2	14,167	18,390	-98,184
MF**	2916.11	7,988	25,031	137,163
DII	1448.37	15,190	43,418	229,302

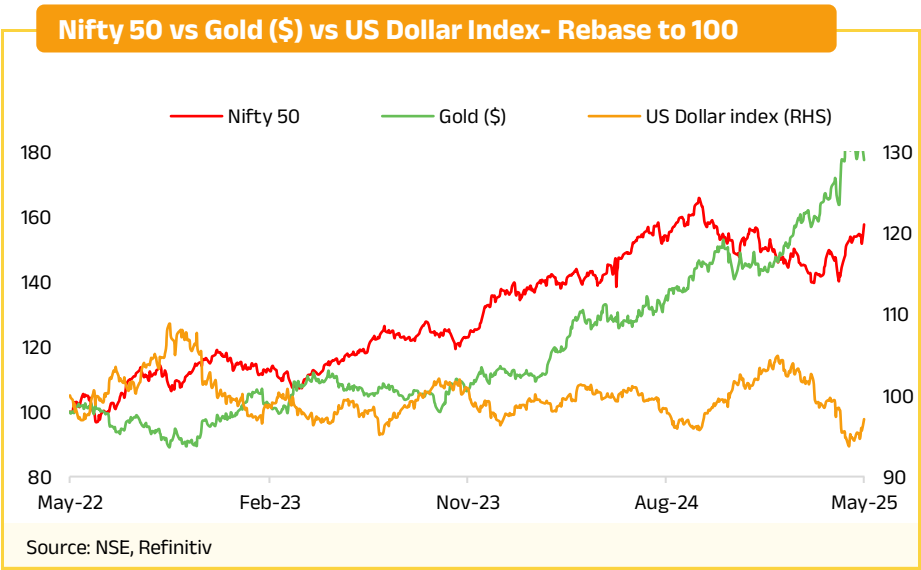
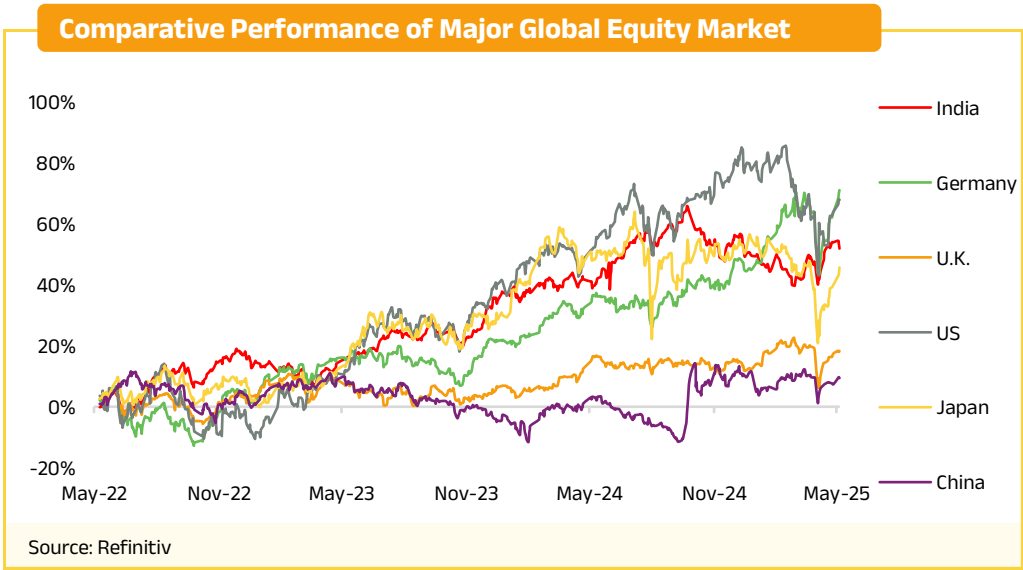
Source: SEBI, NSDL;*As on 9th May 2025;**As on 7th May 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25044.10	24065.50	4.07%
Near Basis	119.40	57.50	107.65%
Mid Futures	25150.80	24174.30	4.04%
Mid Basis	226.10	166.30	35.96%
Near Open Interest (Cr.)	1.26	1.26	0.19%
Mid Open Interest (Cr.)	0.27	0.21	32.07%
Rollover (%)	19.43	15.72	23.64%
Put Call Ratio (OI)	1.29	0.94	37.22%
Put Call Ratio(Vol)	0.73	0.88	-16.68%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	4654	7246	27239
Index Options	1132594	1164360	479310
Stock Futures	21422	23177	364769
Stock Options	58595	57344	80155
Total	1217265	1252128	951472
Source: NSE			

Global Equity Market				
Global Indices	12-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3201.93	3.27%	3.53%	9.43%
Nasdaq 100 (U.S.)	20868.15	4.02%	4.51%	11.65%
FTSE (U.K.)	8604.98	0.59%	0.10%	8.05%
DAX Index (Germany)	23566.54	0.29%	0.95%	15.67%
CAC 40 Index (France)	7850.10	1.37%	1.58%	10.49%
SSE Composite (China)	3369.24	0.82%	2.75%	4.05%
Nikkei (Japan)	37644.26	0.38%	2.21%	12.08%
Kospi (South Korea)	2607.33	1.17%	1.86%	7.18%
HangSeng (Hong Kong)	23549.46	2.98%	4.64%	12.60%
Strait Times (Singapore) ^[1]	3876.16	0.73%	0.60%	10.35%
Ibovespa Sao Paulo (Brazil)	136563.18	0.04%	2.30%	6.96%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8233.50	0.03%	0.93%	7.68%
Jakarta Composite (Indonesia) ^[1]	6832.80	0.07%	0.01%	9.11%
KLSE (Malaysia) ^[1]	1546.50	0.24%	0.45%	6.31%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	12-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	92,631	-3.57%	-2.37%	-0.53%
Gold (\$/oz)	3,233.72	-2.72%	-3.00%	-0.08%
Silver (INR/1 kg)	93,788	-1.90%	-0.19%	0.89%
Silver (\$/oz)	32.60	-0.30%	0.30%	1.07%
Brent Crude(\$/bbl)	64.75	3.98%	5.08%	-2.47%
Crude Oil (INR/1 bbl)	5,226.00	2.79%	6.91%	0.44%
NYMEX Crude(\$/bbl)	63.12	1.53%	8.27%	2.12%
Natural Gas (INR/1 mmbtu)	325.00	6.63%	6.77%	5.49%
Aluminium (INR/1 kg)	236.00	0.21%	1.07%	-0.27%
Copper (INR/1 kg)	855.35	-0.29%	1.34%	2.01%
Nickel (INR/1 kg)	1,360.90	1.33%	1.63%	2.68%
Lead (INR/1 kg)	182.55	0.86%	-0.11%	-0.25%
Zinc (INR/1 kg)	257.15	0.92%	2.65%	-0.60%
Mentha Oil (INR/1 kg)	991.50	-0.50%	0.43%	0.72%
Baltic Dry Index ^[1]	1,299	-1.29%	-8.59%	1.96%
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	7.65	1.71	10.94	18.37
Mid Cap Fund	8.42	-3.44	10.69	24.36
Large & Mid Cap Fund	7.61	-1.31	10.84	21.45
Small Cap Fund	6.06	-7.79	7.15	22.99
Multi Cap Fund	7.55	-2.33	9.91	22.65
Focused Fund	7.54	-0.72	10.43	19.18
Value Fund	7.11	-2.50	8.66	22.76
Contra Fund	6.27	-2.26	10.11	23.91
ELSS	7.60	-1.86	9.24	20.40
Equity Savings	2.56	2.55	8.71	10.64
Arbitrage Fund	0.34	3.09	6.77	6.44
Dividend Yield Fund	6.12	-2.74	8.01	21.53
Aggressive Hybrid Fund	6.00	0.96	10.66	16.93
Balanced Advantage	4.62	1.43	8.63	13.47
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 09 May, 2025