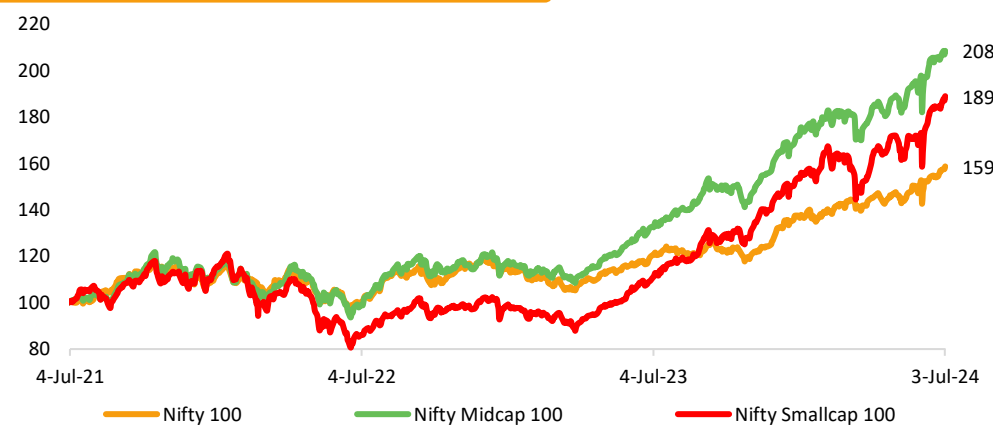


Broad Indices Historical Movement



Source: NSE

Broad Indices

	3-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,286.50	0.67%	1.75%	4.40%
Nifty 100	25,306.90	0.74%	1.77%	3.95%
Nifty 200	13,737.60	0.75%	1.79%	4.20%
Nifty 500	22,851.20	0.76%	1.85%	4.83%
Nifty Large Midcap 250	15,941.90	0.76%	1.82%	4.97%
Nifty Midcap 150	21,072.75	0.78%	1.90%	5.95%
Nifty Next 50	72,584.95	1.08%	1.89%	2.78%
Nifty Smallcap 250	17,494.70	0.90%	2.33%	9.69%

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

Smart Beta Index

Index	3-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,913.95	1.30%	1.84%	0.50%
NIFTY 500 Value 50	14,905.09	1.19%	2.52%	-0.75%
Nifty 200 Quality 30	21,017.80	0.64%	2.44%	6.23%
Nifty 50 Equal Weight	30,502.65	0.66%	1.87%	4.03%
NIFTY Alpha Low Volatility 30	28,152.80	0.48%	1.14%	3.48%
Nifty High Beta 50	4,263.36	1.96%	2.20%	0.89%
Nifty Low Volatility 50	23,876.15	0.48%	1.57%	5.86%
Nifty Midcap150 Momentum 50	63,633.40	1.22%	1.50%	2.03%
Nifty PSE	10,888.05	1.62%	3.27%	-3.92%
Nifty SME Emerge	15,260.05	3.39%	6.02%	17.37%
Nifty 100 ESG	4,811.40	0.78%	2.01%	5.82%

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

Sector Indices

Index	3-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,182.80	0.21%	0.66%	4.96%
Nifty Bank	53,089.25	1.77%	0.41%	4.14%
Nifty Consumption	11,163.05	0.52%	0.65%	5.04%
Nifty Financial	23,923.75	1.80%	1.40%	5.87%
Nifty FMCG	57,177.55	0.90%	1.26%	4.62%
Nifty Healthcare	12,650.80	0.76%	2.11%	6.78%
Nifty IT	37,314.35	0.04%	5.39%	14.77%
Nifty Media	2,054.10	-0.39%	1.51%	6.48%
Nifty Metal	9,940.10	1.06%	2.32%	-1.08%
Nifty MNC	30,661.35	0.54%	1.74%	5.36%
Nifty Pharma	19,915.30	0.65%	1.89%	5.57%
Nifty Realty	1,113.85	0.33%	1.31%	3.13%
Nifty Energy	41,784.50	0.17%	2.36%	-2.79%

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

Nifty 50 Top 5 Gainers

Company	3-Jul-24	Prev_Day	% Change	1 Week
Tata Beverages	1,146.35	1,105.00	3.74	5.47
Adani Ports & SEZ	1,510.65	1,474.85	2.43	2.92
Kotak Bank	1,810.70	1,769.60	2.32	0.70
HDFC Bank	1,768.65	1,730.60	2.20	3.95
Axis Bank	1,280.00	1,253.40	2.12	-0.42

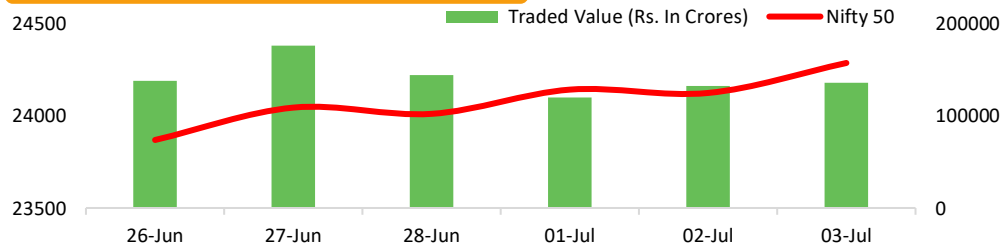
Source: NSE

Nifty 50 Top 5 Losers

Company	3-Jul-24	Prev_Day	% Change	1 Week
TCS	3,965.25	4017	-1.30	2.84
Titan Industries Limited	3,360.25	3400	-1.16	-0.37
Shree Cements Limited	27,383.90	27698	-1.13	-0.42
RIL	3,104.85	3130	-0.81	2.54
Tata Motors	975.65	981	-0.58	2.50

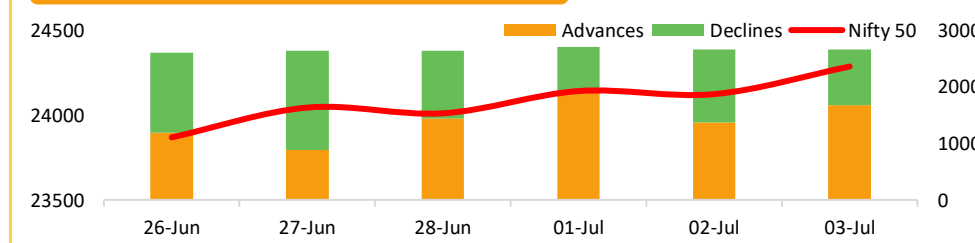
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

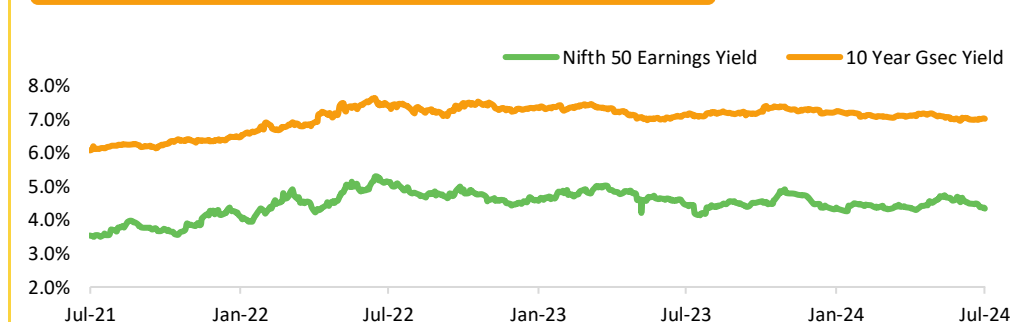
Indian equity markets closed with healthy gains amid positive global cues. After opening on a higher note, the key benchmark indices reached fresh highs and closed near peaks, supported by purchasing across the sectors as sentiments were boosted following the dovish commentary from the U.S. Federal Reserve chair, which fueled hopes that rate cuts are closer.

LatentView Analytics, a company specializing in digital analytics consulting and solutions based in Chennai, has purchased 70% of the remaining equity in Decision Point for \$39.1 million.

Jakson Green, a new energy transition platform, announced that it has signed an agreement with NHPC, a state-owned company, for the provision of 400 MW of solar power. According to reports, Jakson Green has signed its first Power Purchase Agreement (PPA) with NHPC Ltd.

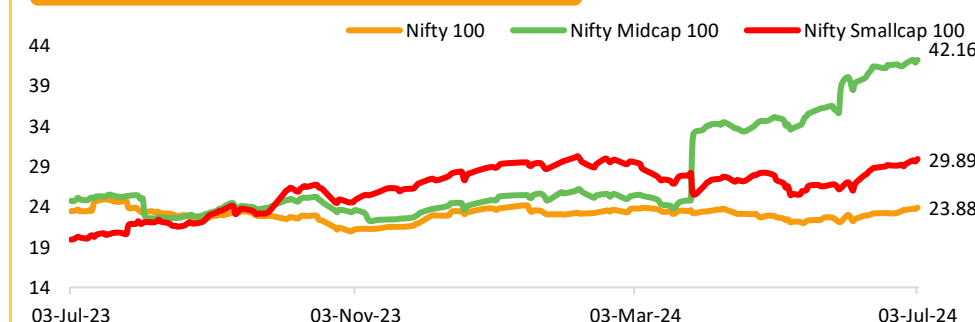
Hyundai Motor Group and LG Energy Solutions have officially opened Indonesia's inaugural electric vehicle battery cell production facility, capable of producing 10 Gigawatt hours (GWh) of battery cells annually.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



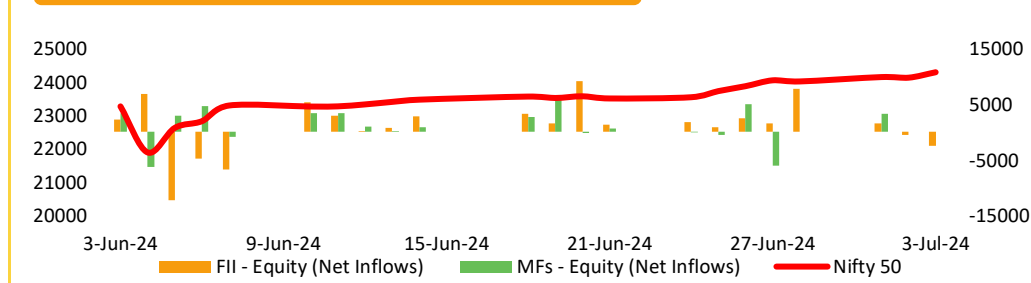
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-2507.09	-1,448	-1,448	1,753
MF**	3248.88	3,249	3,249	186,127
DII	-924.43	3,641	3,641	239,768

Source: SEBI, NSDL;**As on 1st Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24350.40	24203.20	0.61%
Near Basis	63.90	79.30	-19.42%
Mid Futures	24462.50	24319.00	0.59%
Mid Basis	176.00	195.20	-9.84%
Near Open Interest (Cr.)	1.45	1.46	-0.85%
Mid Open Interest (Cr.)	0.14	0.13	0.54%
Rollover (%)	9.33	9.03	3.23%
Put Call Ratio (OI)	1.24	1.15	7.63%
Put Call Ratio(Vol)	1.01	1.06	-3.98%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3498	3735	34528
Index Options	2575084	2602770	375678
Stock Futures	29038	34110	300090
Stock Options	43865	44815	27002
Total	2651485	2685430	737298

Source: NSE

Global Equity Market

Global Indices	3-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3013.16	0.49%	1.06%	4.46%
Nasdaq 100 (U.S.)	20186.63	0.87%	2.21%	8.52%
FTSE (U.K.)	8171.12	0.61%	-0.66%	-1.11%
DAX Index (Germany)	18374.53	1.16%	1.21%	-1.26%
CAC 40 Index (France)	7632.08	1.24%	0.30%	-4.58%
SSE Composite (China)	2982.38	-0.49%	0.33%	-3.12%
Nikkei (Japan)	40580.76	1.26%	2.30%	4.26%
Kospi (South Korea)	2794.01	0.47%	0.07%	4.16%
HangSeng (Hong Kong)	17978.57	1.18%	-0.62%	-2.31%
Strait Times (Singapore)	3415.51	1.41%	2.52%	1.99%
Ibovespa Sao Paulo (Brazil)	125661.89	0.70%	2.46%	2.97%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7739.90	0.28%	-0.55%	-0.27%
Jakarta Composite (Indonesia)	7196.76	1.01%	4.22%	2.28%
KLSE (Malaysia)	1615.32	1.09%	1.53%	1.17%

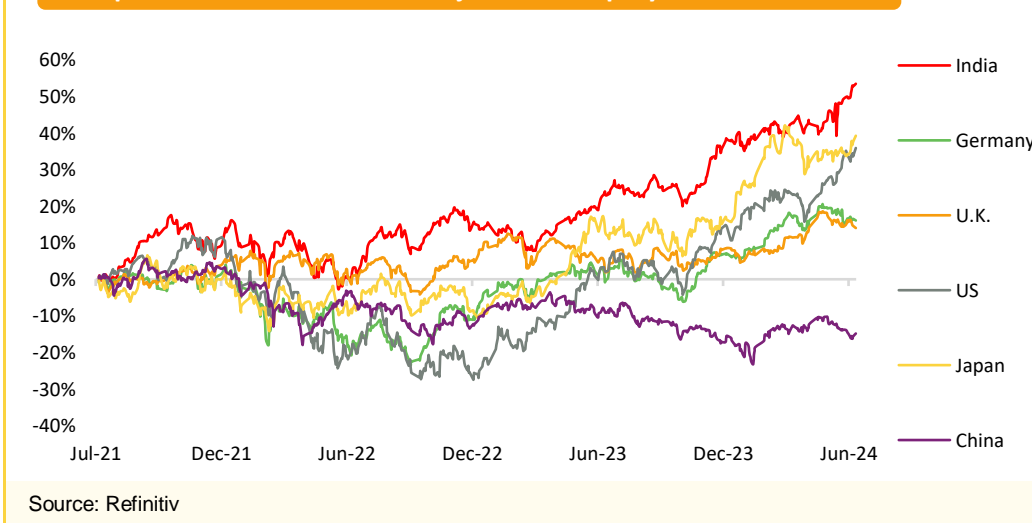
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

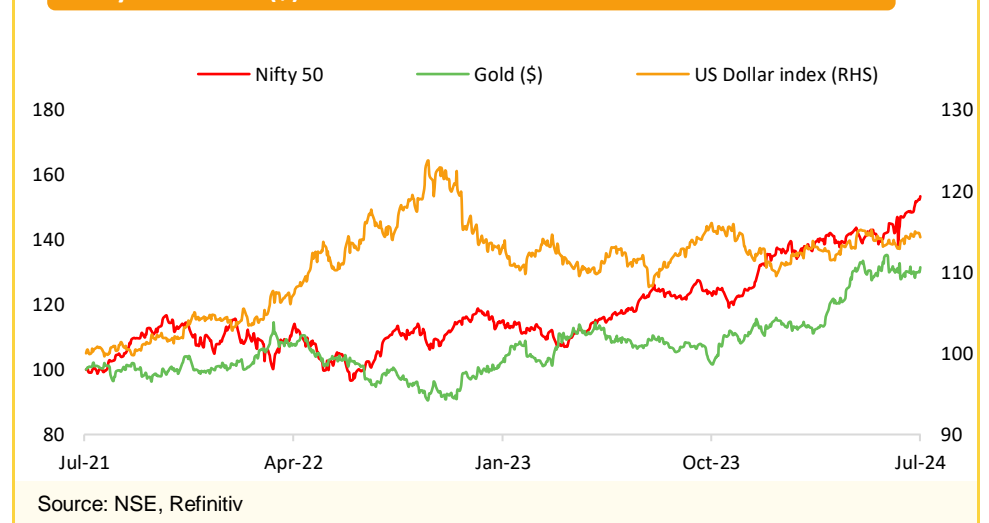
Commodity Prices	3-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,975	0.74%	1.26%	0.68%
Gold (\$/oz)	2,356.06	1.15%	2.53%	0.24%
Silver (INR/1 kg)	89,442	1.84%	3.23%	-0.72%
Silver (\$/oz)	30.47	3.25%	5.96%	-0.94%
Brent Crude(\$/bbl)	89.70	-0.08%	2.81%	15.61%
Crude Oil (INR/1 bbl)	6,916.00	-0.55%	2.57%	7.84%
NYMEX Crude(\$/bbl)	85.09	1.31%	3.65%	13.21%
Natural Gas (INR/1 mmbtu)	203.40	-1.60%	-11.53%	-5.61%
Aluminium (INR/1 kg)	233.00	0.41%	1.15%	-3.98%
Copper (INR/1 kg)	850.80	0.21%	1.43%	-2.56%
Nickel (INR/1 kg)	1,465.40	-0.70%	0.42%	-12.12%
Lead (INR/1 kg)	197.00	-0.13%	1.99%	0.51%
Zinc (INR/1 kg)	275.45	0.27%	2.82%	3.32%
Mentha Oil (INR/1 kg)	959.90	1.54%	2.29%	-2.95%
Baltic Dry Index ^[1]	2,179	0.97%	10.95%	20.52%

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

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index - Rebase to 100



Term of the Day



Hawkish

Definition: Hawkish refers to the comment or an aggressive tone made by policymaker who is in favour of high interest rates to contain inflation.



Explanation

Hawkish tone from the Central banks indicates that they are considering tighter monetary policy in the event of higher expected inflation. It is opposite of dovish. In other words, a country's monetary policymakers are termed as "Hawkish" when they believe that in order to fight inflation higher interest rates are needed.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	4.54	17.89	34.83	17.61
Mid Cap Fund	7.27	26.32	55.39	25.40
Large & Mid Cap Fund	5.81	22.43	45.28	21.93
Small Cap Fund	9.34	22.25	52.18	26.76
Multi Cap Fund	6.37	22.29	48.49	23.56
Focused Fund	5.64	19.67	39.00	19.19
Value Fund	5.19	21.74	49.11	23.56
Contra Fund	4.61	22.54	49.07	25.41
ELSS	6.12	19.94	41.40	21.35
Equity Savings	2.13	7.98	16.04	9.68
Arbitrage Fund	0.73	3.79	7.59	5.46
Dividend Yield Fund	4.17	21.32	48.51	23.98
Aggressive Hybrid Fund	4.31	16.44	31.75	16.38
Balanced Advantage	2.73	11.99	24.89	12.81

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 02 Jul, 2024

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