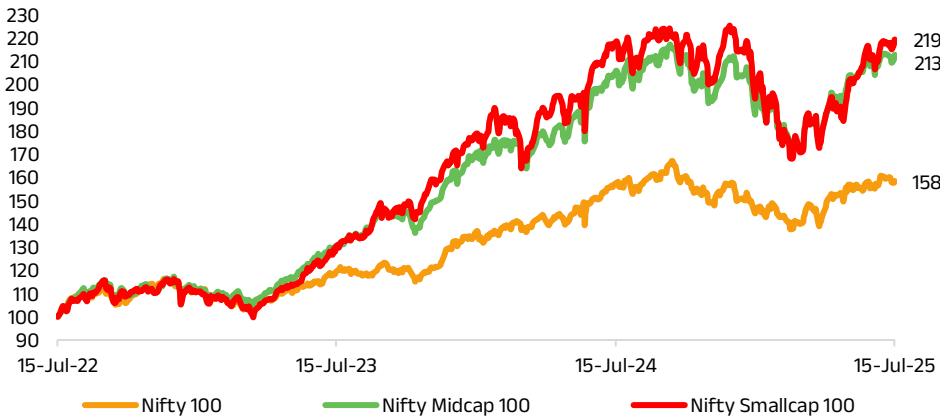


Broad Indices Historical Movement



Source: NSE

Broad Indices

	15-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,195.80	0.45%	-1.28%	1.93%
Nifty 100	25,849.15	0.49%	-1.06%	2.04%
Nifty 200	14,116.20	0.57%	-0.82%	2.10%
Nifty 500	23,449.15	0.60%	-0.52%	2.37%
Nifty Large Midcap 250	16,475.15	0.71%	-0.33%	2.27%
Nifty Midcap 150	21,974.90	0.92%	0.41%	2.53%
Nifty Next 50	68,727.55	0.65%	0.01%	2.61%
Nifty Smallcap 250	17,952.15	0.81%	1.51%	4.31%

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

Smart Beta Index

Index	15-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,148.30	0.54%	-0.90%	0.40%
NIFTY 500 Value 50	14,311.70	0.51%	-0.30%	2.92%
Nifty 200 Quality 30	20,973.80	0.88%	-0.83%	1.78%
Nifty 50 Equal Weight	31,655.40	0.55%	-0.91%	2.04%
NIFTY Alpha Low Volatility 30	26,901.20	0.45%	-1.00%	1.09%
Nifty High Beta 50	3,843.10	0.42%	0.28%	2.91%
Nifty Low Volatility 50	25,257.40	0.56%	-0.79%	2.00%
Nifty Midcap150 Momentum 50	62,681.60	0.86%	-0.27%	0.73%
Nifty PSE	10,069.75	0.25%	-0.89%	1.85%
Nifty SME Emerge	15,063.16	0.08%	1.37%	3.19%
Nifty 100 ESG	4,958.85	0.51%	-0.92%	1.86%

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

Sector Indices

Index	15-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,905.25	1.50%	0.22%	2.48%
Nifty Bank	57,006.65	0.43%	-0.44%	2.66%
Nifty Consumption	11,750.00	0.72%	-0.33%	3.31%
Nifty Financial	26,928.95	0.47%	-0.33%	2.25%
Nifty FMCG	56,429.05	0.72%	1.67%	3.49%
Nifty Healthcare	14,787.65	1.23%	1.37%	3.20%
Nifty IT	37,424.60	0.40%	-4.00%	-2.72%
Nifty Media	1,735.85	0.48%	-0.33%	0.56%
Nifty Metal	9,411.95	0.04%	-1.11%	1.65%
Nifty MNC	29,190.05	0.45%	0.78%	3.57%
Nifty Pharma	22,665.70	1.14%	2.25%	3.10%
Nifty Realty	983.95	0.79%	0.16%	-2.29%
Nifty Energy	36,308.50	0.30%	-0.81%	1.59%

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

Nifty 50 Top 5 Gainers

Company	15-Jul-25	Prev_Day	% Change	1 Week
Hero Moto	4,454.00	4,251.70	4.76	3.57
Bajaj Auto	8,311.00	8,087.50	2.76	-0.34
Sun Pharma	1,727.50	1,682.60	2.67	3.29
United Phos	673.80	659.50	2.17	0.07
IndusInd Bank	881.00	867.60	1.54	3.61

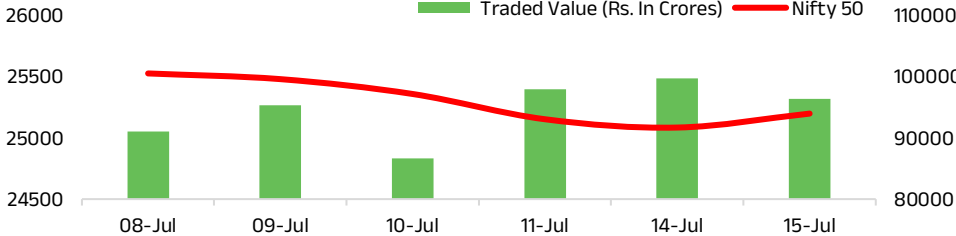
Source: NSE

Nifty 50 Top 5 Losers

Company	15-Jul-25	Prev_Day	% Change	1 Week
HCL Tech	1,566.40	1620	-3.30	-8.30
SBI Life Insurance Co.	1,824.80	1851	-1.43	0.43
HDFC Standard Life Insurance Co.	756.85	765	-1.03	-4.70
Kotak Bank	2,188.10	2204	-0.71	-1.64
Axis Bank	1,165.90	1173	-0.58	0.04

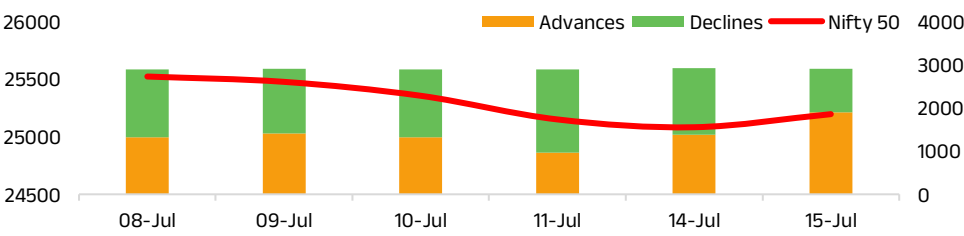
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

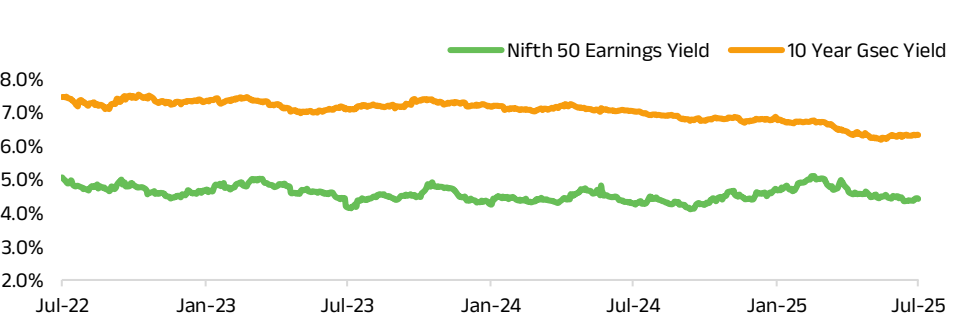
Indian equity markets snapped a four-day losing streak, supported by positive global cues amid optimism that the U.S. President may soften his stance before the proposed measures take effect on Aug 1, 2025. The rally gained further momentum after domestic retail inflation eased to 2.1% in Jun 2025.

Aurobindo Pharma announced that it will manufacture and supply the long-acting injectable HIV treatment, cabotegravir, across 133 countries. The Hyderabad-based drugmaker has been selected as one of the generic manufacturers under the expanded voluntary licensing agreement between the Medicines Patent Pool (MPP) and ViiV Healthcare.

Tata Steel's steelmaking site in the UK is set for a new beginning, as construction of an electric arc furnace (EAF) gets underway marking a significant shift toward low-carbon steel production.

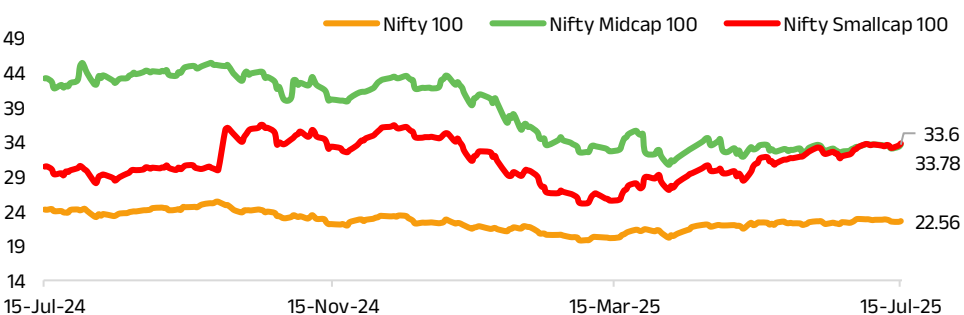
Rail Vikas Nigam announced that it has secured an order from the Delhi Metro Rail Corporation. The project is valued at Rs. 447,42,48,757.33, inclusive of 18% GST.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



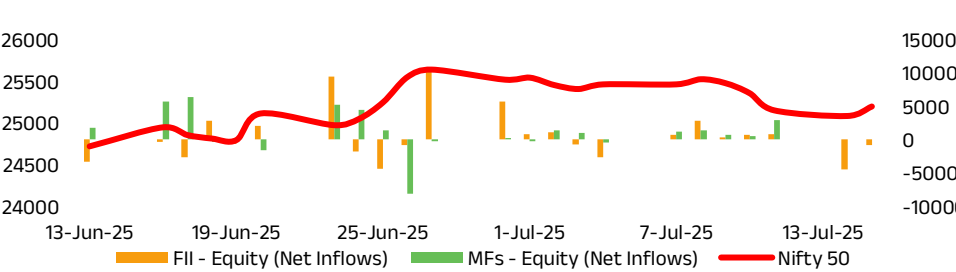
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	-789.32	-1,446	-1,446	-79,346
MF**	0	8,310	8,310	241,362
DII	1555.03	15,746	15,746	364,221

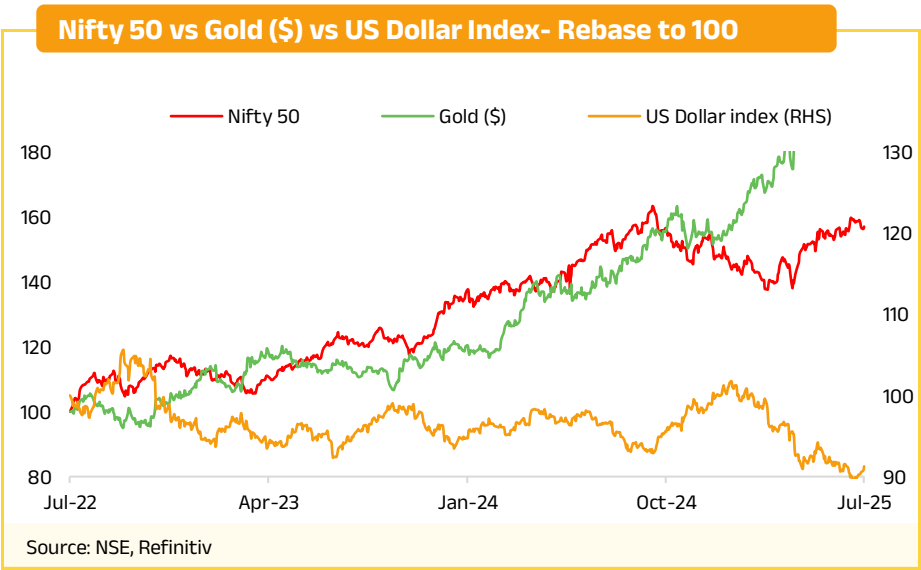
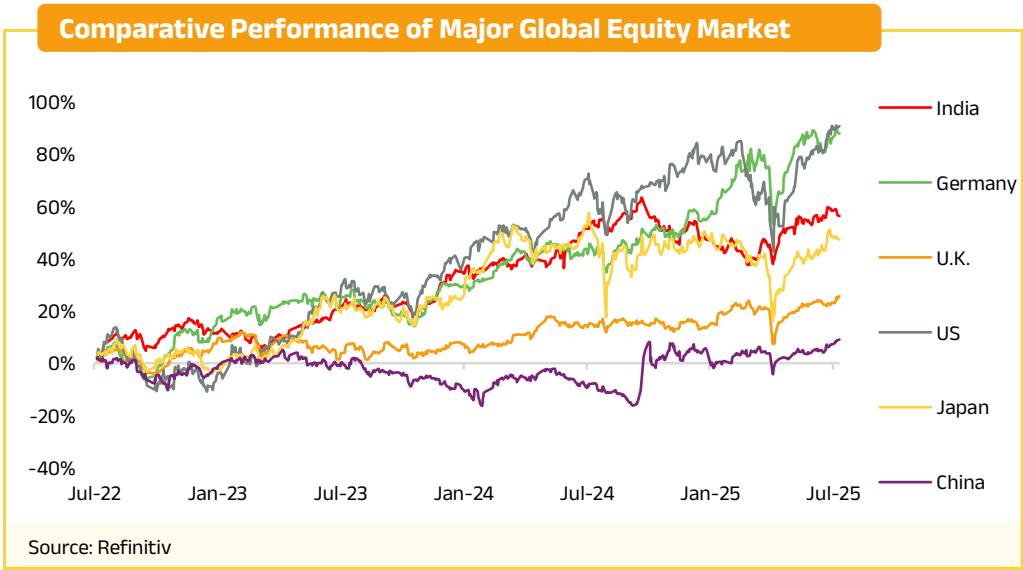
Source: SEBI, NSDL;**As on 12th Jul 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25265.60	25167.50	0.39%
Near Basis	69.80	85.20	-18.08%
Mid Futures	25367.70	25268.80	0.39%
Mid Basis	171.90	186.50	-7.83%
Near Open Interest (Cr.)	1.37	1.37	-0.28%
Mid Open Interest (Cr.)	0.45	0.44	2.28%
Rollover (%)	26.58	26.12	1.75%
Put Call Ratio (OI)	0.88	0.72	21.94%
Put Call Ratio(Vol)	0.80	0.94	-14.36%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2876	6150	36357
Index Options	856758	868162	313768
Stock Futures	18524	18787	387593
Stock Options	20010	19743	53609
Total	898169	912842	791327
Source: NSE			

Global Equity Market				
Global Indices	15-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3415.43	-0.48%	0.21%	4.46%
Nasdaq 100 (U.S.)	22884.59	0.13%	0.80%	5.80%
FTSE (U.K.)	8938.32	-0.66%	0.95%	0.99%
DAX Index (Germany)	24060.29	-0.42%	-0.61%	2.31%
CAC 40 Index (France)	7766.21	-0.54%	-0.01%	1.06%
SSE Composite (China)	3505.00	-0.42%	0.22%	3.79%
Nikkei (Japan)	39678.02	0.55%	-0.03%	4.87%
Kospi (South Korea)	3215.28	0.41%	3.22%	11.08%
HangSeng (Hong Kong)	24590.12	1.60%	1.83%	2.92%
Strait Times (Singapore)	4119.82	0.26%	1.78%	5.33%
Ibovespa Sao Paulo (Brazil)	135250.10	-0.04%	-2.91%	-1.43%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8630.30	0.70%	0.46%	0.97%
Jakarta Composite (Indonesia)	7140.47	0.61%	3.42%	-0.36%
KLSE (Malaysia)	1525.40	-0.79%	-0.31%	0.48%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	15-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,604	-0.36%	1.11%	-1.14%
Gold (\$/oz)	3,322.18	-0.64%	0.66%	-3.21%
Silver (INR/1 kg)	111,813	-1.74%	4.13%	5.57%
Silver (\$/oz)	37.72	-1.10%	2.54%	3.93%
Brent Crude(\$/bbl)	72.24	-0.44%	-2.33%	-4.65%
Crude Oil (INR/1 bbl)	5,760.00	-1.99%	-1.18%	-1.49%
NYMEX Crude(\$/bbl)	67.66	-0.63%	-2.58%	-8.12%
Natural Gas (INR/1 mmbtu)	298.00	4.75%	1.78%	0.10%
Aluminium (INR/1 kg)	248.90	-0.30%	0.16%	2.75%
Copper (INR/1 kg)	877.40	-0.52%	-2.35%	0.27%
Nickel (INR/1 kg)	1,316.70	-0.83%	-0.50%	-0.11%
Lead (INR/1 kg)	182.65	0.36%	-0.11%	-1.54%
Zinc (INR/1 kg)	259.25	-0.38%	0.64%	2.23%
Mentha Oil (INR/1 kg)	925.50	0.33%	-1.09%	-2.48%
Baltic Dry Index	1,866	4.66%	30.40%	-5.18%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Primary Instrument

Definition: It is a type of financial instrument whose price is derived from its own market value or whose price is not derived from any other instrument. It simply means that the price of the primary instrument is directly determined by the market.



Explanation

Primary instruments include stocks, bonds, Certificate of Deposit (CD) and anything else that has its own value. In contrast to this, the price of derivative instruments, such as options, swaps and futures, is based on the value of their underlying assets like spot equity, currency, commodity and bonds. Hence, derivative products are known non-primary instruments.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.28	7.86	1.54	18.21
Mid Cap Fund	3.02	8.25	2.55	25.30
Large & Mid Cap Fund	2.57	8.05	2.76	22.31
Small Cap Fund	3.93	6.61	2.72	25.58
Multi Cap Fund	3.03	7.63	3.02	23.53
Focused Fund	2.49	7.73	2.32	19.66
Value Fund	2.85	6.79	0.28	23.94
Contra Fund	3.07	7.38	2.26	24.74
ELSS	2.72	7.61	1.87	21.27
Equity Savings	1.08	4.67	5.92	10.99
Arbitrage Fund	0.39	3.16	6.66	6.71
Dividend Yield Fund	2.10	6.37	-1.30	23.05
Aggressive Hybrid Fund	2.06	7.15	3.71	17.49
Balanced Advantage	1.72	5.85	3.68	13.90
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.				