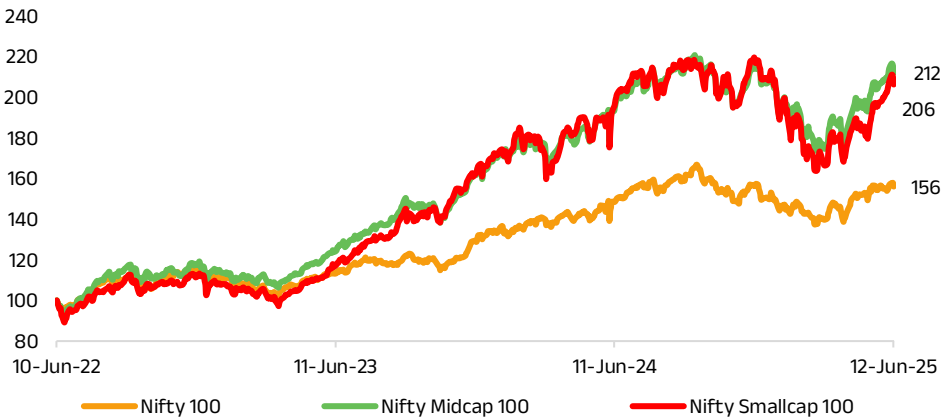


Broad Indices Historical Movement



Source: NSE

Broad Indices

	12-Jun-25	1 Day	1 Week	1 Month
Nifty 50	24,888.20	-1.01%	0.55%	-0.15%
Nifty 100	25,511.55	-1.15%	0.56%	0.51%
Nifty 200	13,915.60	-1.22%	0.50%	1.32%
Nifty 500	23,046.45	-1.25%	0.49%	2.38%
Nifty Large Midcap 250	16,195.45	-1.35%	0.35%	3.17%
Nifty Midcap 150	21,509.65	-1.54%	0.15%	5.79%
Nifty Next 50	67,536.50	-1.80%	0.58%	3.78%
Nifty Smallcap 250	17,276.90	-1.44%	0.60%	10.15%

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

Smart Beta Index

Index	12-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,133.95	-1.49%	0.16%	3.46%
NIFTY 500 Value 50	14,017.85	-1.81%	1.36%	2.24%
Nifty 200 Quality 30	20,692.85	-1.44%	0.68%	1.82%
Nifty 50 Equal Weight	31,190.85	-1.14%	1.07%	1.15%
NIFTY Alpha Low Volatility 30	26,728.60	-0.74%	0.73%	1.11%
Nifty High Beta 50	3,765.05	-2.05%	0.43%	7.44%
Nifty Low Volatility 50	24,874.80	-0.82%	0.76%	0.04%
Nifty Midcap150 Momentum 50	62,431.75	-1.75%	-0.05%	5.46%
Nifty PSE	9,919.35	-2.10%	0.29%	3.13%
Nifty SME Emerge	14,623.43	-0.59%	0.69%	7.39%
Nifty 100 ESG	4,899.90	-1.20%	1.05%	1.54%

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

Sector Indices

Index	12-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,411.80	-1.65%	0.45%	0.05%
Nifty Bank	56,082.55	-0.67%	0.58%	1.26%
Nifty Consumption	11,451.00	-1.41%	-0.31%	-0.74%
Nifty Financial	26,579.90	-0.78%	0.73%	0.31%
Nifty FMCG	55,104.10	-1.28%	-0.95%	-3.50%
Nifty Healthcare	14,323.15	0.05%	2.01%	4.05%
Nifty IT	38,460.30	-0.84%	3.64%	0.46%
Nifty Media	1,723.15	-0.42%	-0.13%	8.37%
Nifty Metal	9,348.50	-1.55%	1.27%	4.87%
Nifty MNC	28,286.80	-1.33%	-0.37%	2.67%
Nifty Pharma	22,036.15	-0.10%	1.81%	4.42%
Nifty Realty	1,006.45	-2.02%	1.34%	15.34%
Nifty Energy	35,918.35	-1.93%	0.26%	3.41%

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

Nifty 50 Top 5 Gainers

Company	12-Jun-25	Prev_Day	% Change	1 Week
Asian Paints	2,219.40	2,208.80	0.48	-1.07
Tech Mahindra	1,644.40	1,637.50	0.42	5.22
Wipro	259.61	258.92	0.27	4.71
ONGC	247.88	247.32	0.23	4.25
Divi's Lab	6,725.00	6,719.00	0.09	1.46

Source: NSE

Nifty 50 Top 5 Losers

Company	12-Jun-25	Prev_Day	% Change	1 Week
BPCL	318.65	334	-4.55	2.86
Tata Motors	715.35	736	-2.86	0.73
Titan Industries Limited	3,452.70	3542	-2.51	-1.46
Coal India	392.70	402	-2.34	-0.56
L&T Ltd.	3,603.90	3685	-2.20	-1.06

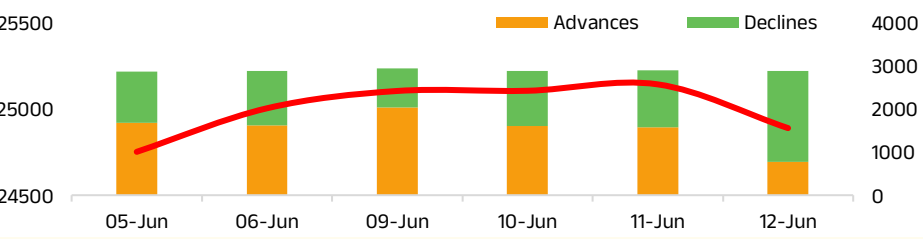
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

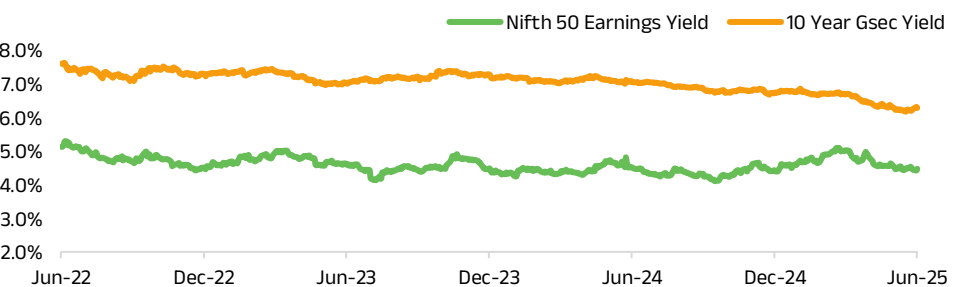
 Indian equity markets declined sharply due to uncertainty over the U.S.-China trade deal and rising geopolitical tensions. Conflicting signals on tariffs and a potential announcement of new U.S. trade terms added to investor concerns. Meanwhile, Iran threatened to target U.S. bases if nuclear talks fail, and speculation of an Israeli strike on Iran's nuclear sites further fueled market anxiety.

 HCLTech has declared that Volvo Cars has selected it as one of its key suppliers for engineering services. Building on a well-established partnership in digital and product lifecycle management (PLM) services, this agreement greatly enhances HCLTech's involvement to encompass the provision of comprehensive engineering solutions on a large scale.

 SG Mart, a leading entity in the B2B construction materials industry, has entered the renewable energy sector by initiating the supply of solar module mounting structures. The firm's solar initiative has been introduced under the brand name APL Apollo SunSteel.

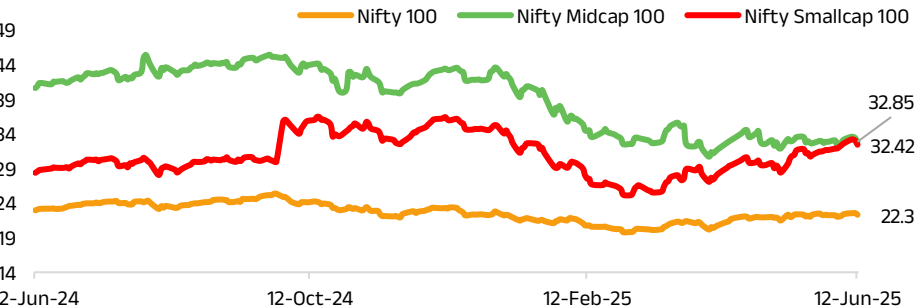
 Bharat Biotech announced its collaboration with GSK plc to develop a vaccine for Shigellosis, a serious type of bacterial diarrhea. The altSonflex1-2-3 vaccine candidate, which was developed by GSK and is currently progressing through a strategic partnership with Bharat Biotech, is among the most advanced Shigella vaccine candidates in the world.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



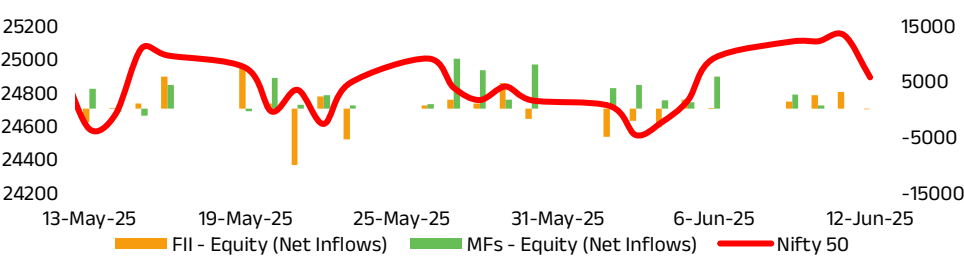
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII's & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	-131.4	-2,126	21,958	-94,616
MF**	600.89	19,705	93,836	205,968
DII	9393.85	41,109	133,731	319,615

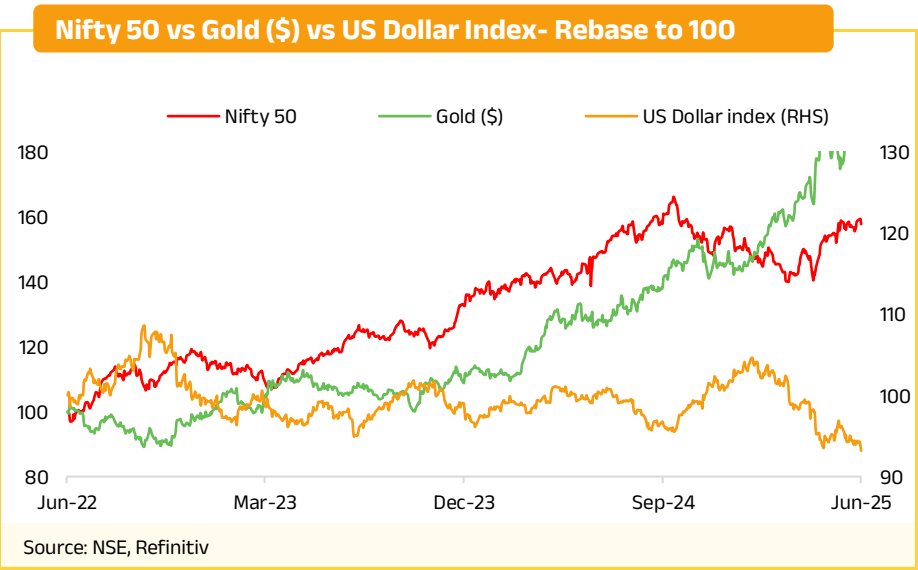
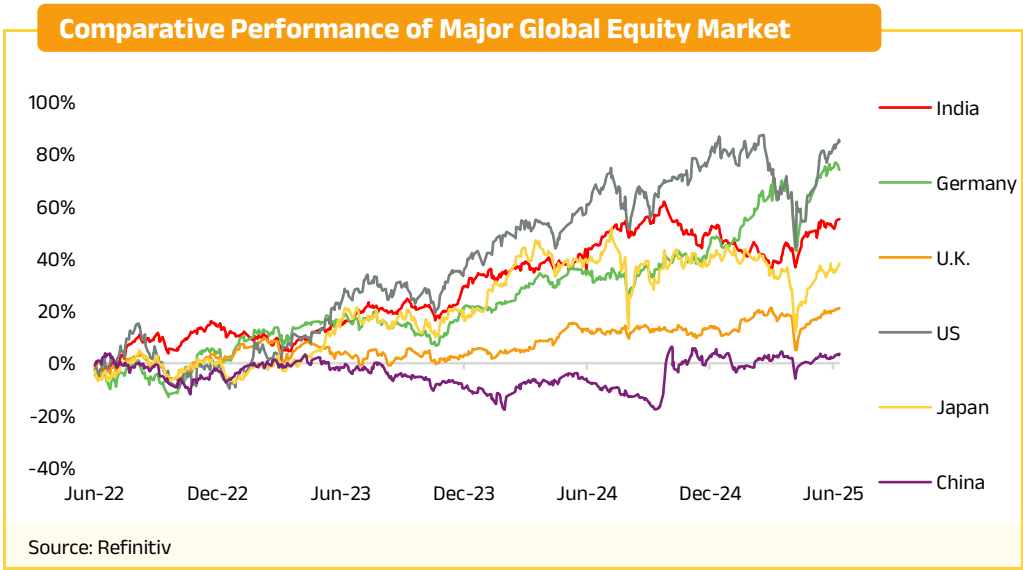
Source: SEBI, NSDL;\*\*As on 10th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24937.40	25211.70	-1.09%
Near Basis	49.20	70.30	-30.01%
Mid Futures	25068.70	25342.40	-1.08%
Mid Basis	180.50	201.00	-10.20%
Near Open Interest (Cr.)	1.14	1.14	-0.13%
Mid Open Interest (Cr.)	0.57	0.54	6.05%
Rollover (%)	35.20	33.54	4.94%
Put Call Ratio (OI)	0.73	0.97	-25.39%
Put Call Ratio(Vol)	0.93	0.82	13.80%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3316	2070	28289
Index Options	1378242	1320469	442794
Stock Futures	17277	18490	383741
Stock Options	76822	80474	90634
Total	1475657	1421503	945458
Source: NSE			

Global Equity Market				
Global Indices	12-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3308.11	0.33%	1.67%	3.32%
Nasdaq 100 (U.S.)	21913.32	0.24%	1.70%	5.01%
FTSE (U.K.)	8884.92	0.23%	0.84%	3.25%
DAX Index (Germany)	23771.45	-0.74%	-2.27%	0.87%
CAC 40 Index (France)	7765.11	-0.14%	-0.32%	-1.08%
SSE Composite (China)	3402.66	0.01%	0.55%	0.99%
Nikkei (Japan)	38173.09	-0.65%	1.65%	1.40%
Kospi (South Korea)	2920.03	0.45%	3.84%	11.99%
HangSeng (Hong Kong)	24035.38	-1.36%	0.54%	2.06%
Strait Times (Singapore)	3922.20	0.08%	0.12%	1.19%
Ibovespa Sao Paulo (Brazil)	137799.74	0.49%	1.15%	0.91%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8565.10	-0.31%	0.31%	4.03%
Jakarta Composite (Indonesia)	7204.37	-0.25%	1.28%	5.44%
KLSE (Malaysia)	1526.62	0.18%	0.56%	-1.29%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	12-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,795	0.99%	-0.78%	4.50%
Gold (\$/oz)	3,384.04	0.92%	0.92%	4.65%
Silver (INR/1 kg)	104,988	-0.49%	0.97%	11.94%
Silver (\$/oz)	36.38	0.41%	0.62%	11.58%
Brent Crude(\$/bbl)	72.42	2.52%	6.09%	11.85%
Crude Oil (INR/1 bbl)	5,824.00	4.71%	7.81%	11.44%
NYMEX Crude(\$/bbl)	68.53	-0.26%	7.31%	8.57%
Natural Gas (INR/1 mmbtu)	299.70	-0.89%	-6.17%	-7.78%
Aluminium (INR/1 kg)	242.70	0.04%	0.79%	2.84%
Copper (INR/1 kg)	877.35	0.21%	-0.75%	2.57%
Nickel (INR/1 kg)	1,320.00	-1.01%	-1.71%	-3.01%
Lead (INR/1 kg)	182.75	-1.03%	0.69%	0.11%
Zinc (INR/1 kg)	255.80	-0.20%	-1.20%	-0.52%
Mentha Oil (INR/1 kg)	944.30	0.58%	1.68%	-4.76%
Baltic Dry Index <sup>[1]</sup>	1,738	3.45%	6.89%	33.28%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Moving Average

Definition: Moving average is a type of a technical indicator used in charts that smoothen random or short-term fluctuations in price movement. In other words, it is used to analyze data points by calculating a series of averages of different subsets of the full data set. It is widely used in technical analysis and there are broad two types of moving average (MA) - Simple and Exponential.



Explanation

MA uses the basic philosophy of averaging and plots a parallel line with the daily price movement to gauge the direction of the current trend. MA is not used to predict the price direction but rather define the current direction with a lag. To calculate MA, a technical analyst use specific period depending upon the time frame such as 14-day, 50-day, 100-day and 200-day. However, analyst can use any period depending upon situation or his or her preference. Among EMA 12 and 26-day are the most popular short-term averages. The extension of MA is crossover MA, which plots two lines of different periods to understand buy and sell signals.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.16	-0.87	5.61	17.80
Mid Cap Fund	5.46	-3.49	5.86	25.27
Large & Mid Cap Fund	3.82	-2.22	6.58	22.07
Small Cap Fund	7.57	-6.47	5.33	24.53
Multi Cap Fund	4.02	-3.26	5.30	22.93
Focused Fund	2.64	-2.09	6.13	19.21
Value Fund	3.08	-2.82	4.02	23.10
Contra Fund	2.70	-2.28	5.98	24.39
ELSS	3.76	-2.69	5.15	20.66
Equity Savings	1.07	2.14	7.28	10.77
Arbitrage Fund	0.71	3.39	6.76	6.62
Dividend Yield Fund	2.71	-2.44	3.64	22.14
Aggressive Hybrid Fund	2.05	-0.34	6.95	17.04
Balanced Advantage	1.41	0.37	6.04	13.51
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.				

<sup>[1]</sup>Data as on 11 Jun, 2025