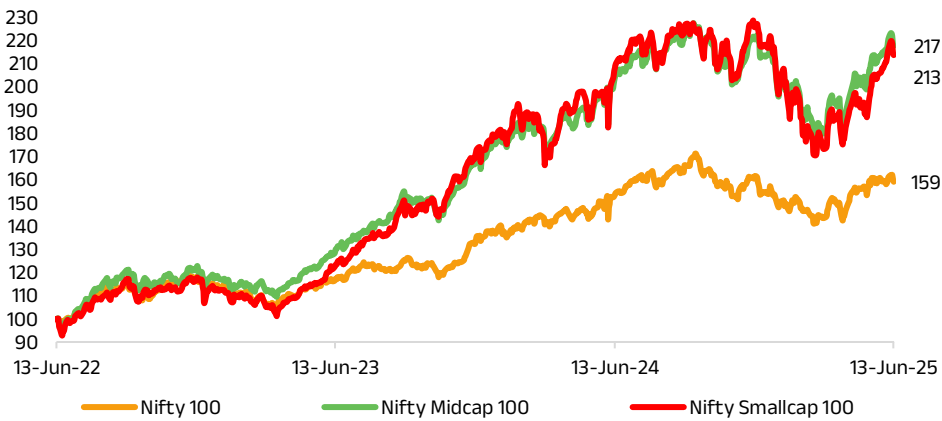


Broad Indices Historical Movement



Source: NSE

Broad Indices

	13-Jun-25	1 Day	1 Week	1 Month
Nifty 50	24,718.60	-0.68%	-1.14%	0.57%
Nifty 100	25,331.35	-0.71%	-1.20%	0.97%
Nifty 200	13,825.40	-0.65%	-1.22%	1.62%
Nifty 500	22,906.20	-0.61%	-1.12%	2.49%
Nifty Large Midcap 250	16,110.25	-0.53%	-1.19%	3.10%
Nifty Midcap 150	21,433.05	-0.36%	-1.18%	5.17%
Nifty Next 50	66,979.05	-0.83%	-1.49%	2.94%
Nifty Smallcap 250	17,210.40	-0.38%	-0.44%	8.82%

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

Smart Beta Index

Index	13-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,023.75	-0.35%	-0.88%	3.46%
NIFTY 500 Value 50	13,905.55	-0.80%	-0.71%	2.33%
Nifty 200 Quality 30	20,606.30	-0.42%	-0.29%	2.01%
Nifty 50 Equal Weight	31,022.20	-0.54%	-0.67%	1.59%
NIFTY Alpha Low Volatility 30	26,612.30	-0.44%	-0.30%	1.08%
Nifty High Beta 50	3,734.30	-0.82%	-2.11%	6.24%
Nifty Low Volatility 50	24,762.50	-0.45%	-0.49%	0.39%
Nifty Midcap150 Momentum 50	62,226.80	-0.33%	-1.25%	4.60%
Nifty PSE	9,886.55	-0.33%	-0.82%	3.23%
Nifty SME Emerge	14,598.08	-0.17%	-0.04%	6.36%
Nifty 100 ESG	4,868.50	-0.64%	-0.93%	1.80%

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

Sector Indices

Index	13-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,327.40	-0.36%	-1.41%	0.69%
Nifty Bank	55,527.35	-0.99%	-1.86%	1.07%
Nifty Consumption	11,373.85	-0.67%	-2.09%	-0.20%
Nifty Financial	26,335.60	-0.92%	-1.91%	0.49%
Nifty FMCG	54,527.15	-1.05%	-2.29%	-3.21%
Nifty Healthcare	14,328.65	0.04%	1.53%	3.09%
Nifty IT	38,469.25	0.02%	3.15%	2.98%
Nifty Media	1,726.10	0.17%	1.19%	6.78%
Nifty Metal	9,258.80	-0.96%	-1.57%	4.80%
Nifty MNC	28,184.30	-0.36%	-1.28%	2.55%
Nifty Pharma	21,985.15	-0.23%	1.39%	2.93%
Nifty Realty	1,007.05	0.06%	-3.13%	16.25%
Nifty Energy	35,740.55	-0.50%	-0.51%	3.45%

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

Nifty 50 Top 5 Gainers

Company	13-Jun-25	Prev_Day	% Change	1 Week
ONGC	251.51	247.88	1.46	4.77
Tech Mahindra	1,659.00	1,644.40	0.89	5.59
TCS	3,445.70	3,434.20	0.33	1.82
Wipro	260.21	259.61	0.23	4.67
Cipla	1,505.20	1,502.80	0.16	0.07

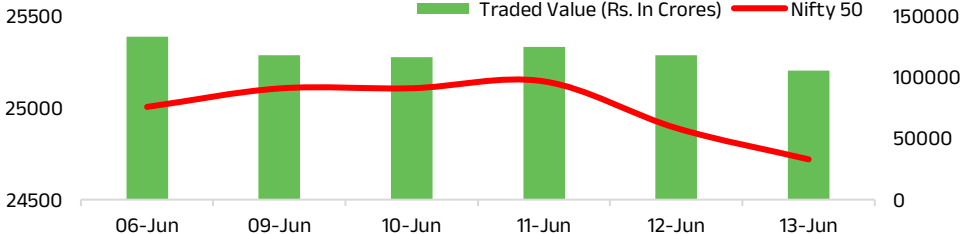
Source: NSE

Nifty 50 Top 5 Losers

Company	13-Jun-25	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,405.00	1446	-2.82	-4.53
BPCL	312.30	319	-1.99	-1.39
Indian Oil	140.34	143	-1.85	-0.31
SBI	792.35	806	-1.69	-2.55
ITC	413.90	421	-1.69	-1.70

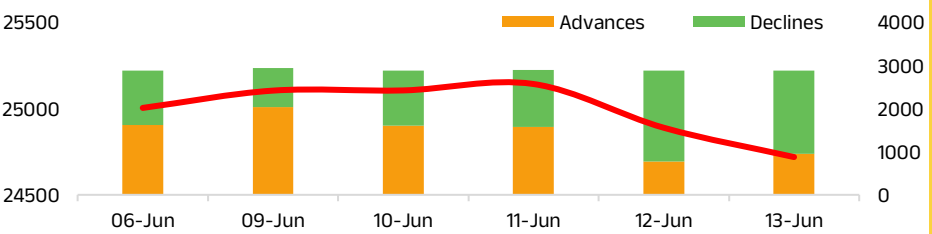
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

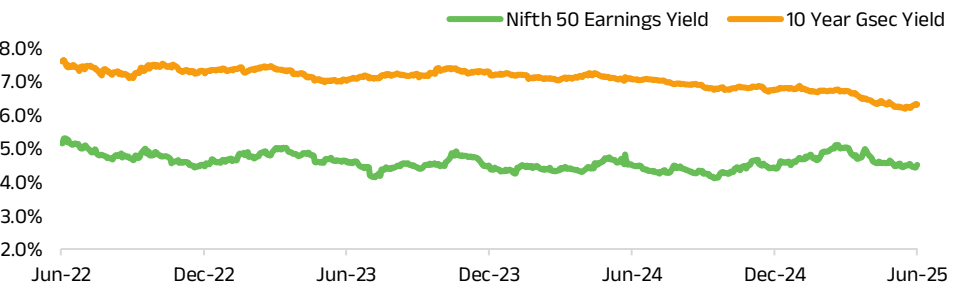
Indian equity markets declined, tracking weak global cues following Israel's strikes on Iran. Israel launched strikes on Iran, targeting nuclear infrastructure and missile facilities, aiming to weaken its military capabilities. In response, Iran deployed over 100 drones toward Israeli territory, escalating tensions in the oil-rich Middle East. The conflict triggered a surge in crude oil prices, extending losses in global and Indian equity markets.

ICRA has finalized a definitive agreement to purchase Fintellix India, which offers risk and reporting solutions to international financial institutions, for USD 26 million through a secondary acquisition.

The Confederation of Real Estate Developers' Associations of India (Credai), representing more than 13,000 private real estate developers, announced a strategic partnership with Adani Cement to enhance sustainable construction and workforce training.

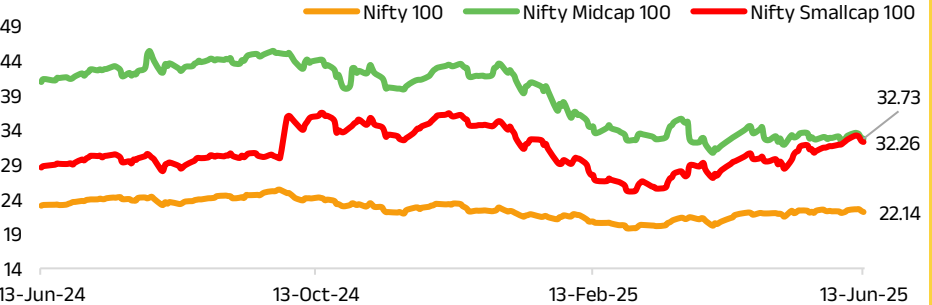
Dixon Technologies (India) Limited and Signify Innovations India Limited have formed a joint venture agreement to create a new company in India focused on the original equipment manufacturing (OEM) of lighting products and accessories.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



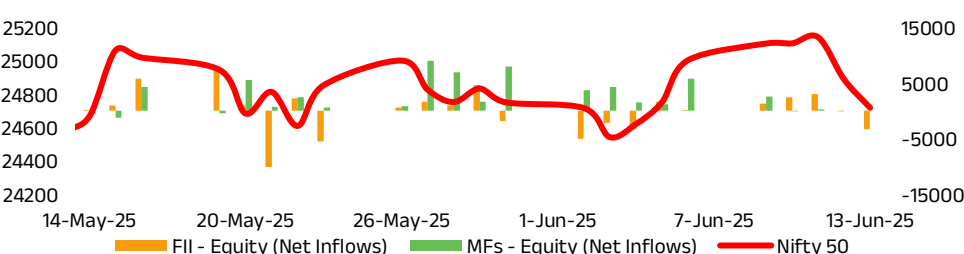
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-3275.76	-5,402	18,682	-97,892
MF**	292.75	19,380	93,512	205,644
DII	3041.44	44,151	136,772	322,656

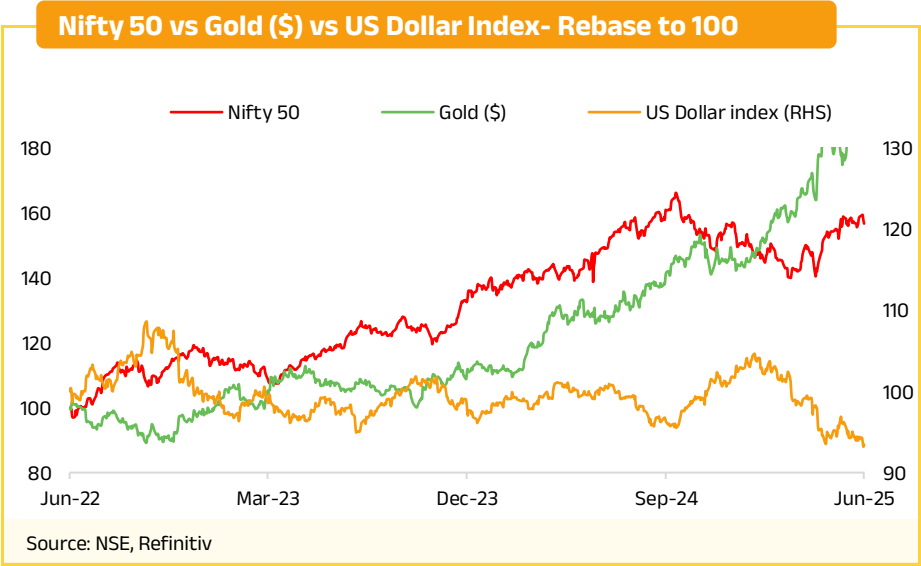
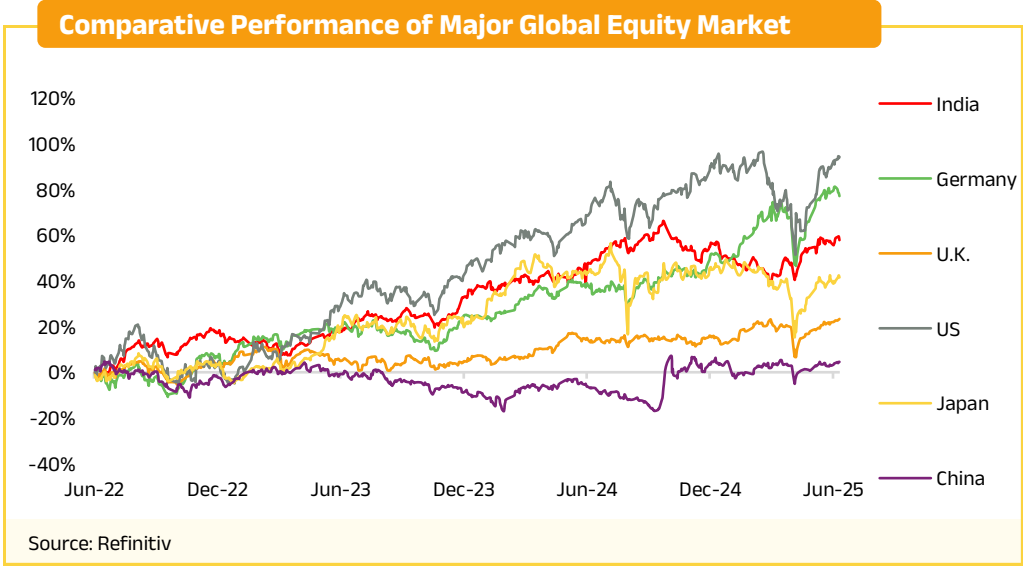
Source: SEBI, NSDL;**As on 11th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24727.40	24937.40	-0.84%
Near Basis	8.80	49.20	-82.11%
Mid Futures	24856.80	25068.70	-0.85%
Mid Basis	138.20	180.50	-23.43%
Near Open Interest (Cr.)	1.18	1.14	3.84%
Mid Open Interest (Cr.)	0.59	0.57	2.25%
Rollover (%)	34.92	35.20	-0.80%
Put Call Ratio (OI)	0.89	0.73	22.87%
Put Call Ratio(Vol)	0.84	0.93	-9.58%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3673	6011	29426
Index Options	3803602	3808667	328478
Stock Futures	17683	23657	381288
Stock Options	77640	82316	95721
Total	3902598	3920650	834913
Source: NSE			

Global Equity Market				
Global Indices	13-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3269.67	-1.16%	-0.52%	1.37%
Nasdaq 100 (U.S.)	21631.04	-1.29%	-0.60%	2.04%
FTSE (U.K.)	8850.63	-0.39%	0.14%	2.88%
DAX Index (Germany)	23516.23	-1.07%	-3.24%	-0.52%
CAC 40 Index (France)	7684.68	-1.04%	-1.54%	-2.40%
SSE Composite (China)	3377.00	-0.75%	-0.25%	0.06%
Nikkei (Japan)	37834.25	-0.89%	0.25%	-0.91%
Kospi (South Korea)	2894.62	-0.87%	2.94%	10.97%
HangSeng (Hong Kong)	23892.56	-0.59%	0.42%	3.39%
Strait Times (Singapore)	3911.42	-0.27%	-0.58%	0.78%
Ibovespa Sao Paulo (Brazil)	137212.63	-0.43%	0.82%	-1.26%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8547.40	-0.21%	0.37%	3.37%
Jakarta Composite (Indonesia)	7166.06	-0.53%	0.74%	4.88%
KLSE (Malaysia)	1518.11	-0.56%	0.09%	-4.06%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	13-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,732	2.00%	2.16%	4.99%
Gold (\$/oz)	3,432.19	1.42%	3.70%	5.69%
Silver (INR/1 kg)	105,912	0.88%	0.88%	9.43%
Silver (\$/oz)	36.29	-0.23%	0.93%	10.34%
Brent Crude(\$/bbl)	75.76	4.61%	9.96%	15.22%
Crude Oil (INR/1 bbl)	5,847.00	0.39%	7.58%	10.20%
NYMEX Crude(\$/bbl)	73.64	7.46%	13.12%	13.57%
Natural Gas (INR/1 mmbtu)	297.70	-0.67%	-5.61%	-4.67%
Aluminium (INR/1 kg)	242.25	-0.19%	0.64%	1.13%
Copper (INR/1 kg)	875.00	-0.27%	-0.27%	1.04%
Nickel (INR/1 kg)	1,318.20	-0.14%	-1.72%	-2.19%
Lead (INR/1 kg)	185.50	1.50%	1.37%	1.03%
Zinc (INR/1 kg)	253.60	-0.86%	-1.23%	-1.32%
Mentha Oil (INR/1 kg)	949.00	0.50%	0.13%	-4.24%
Baltic Dry Index	1,968	3.36%	20.51%	53.75%
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	1.46	-2.05	4.47	18.62
Mid Cap Fund	4.91	-3.63	4.68	26.33
Large & Mid Cap Fund	3.61	-2.92	5.28	22.99
Small Cap Fund	6.55	-6.34	4.21	25.64
Multi Cap Fund	3.73	-3.81	4.12	23.94
Focused Fund	2.66	-2.85	4.92	20.09
Value Fund	2.82	-3.69	2.81	24.03
Contra Fund	2.53	-3.32	4.70	25.17
ELSS	3.58	-3.29	4.11	21.62
Equity Savings	0.97	1.82	6.89	11.06
Arbitrage Fund	0.62	3.43	6.80	6.63
Dividend Yield Fund	2.69	-3.40	2.34	23.04
Aggressive Hybrid Fund	1.95	-1.07	6.05	17.71
Balanced Advantage	1.37	-0.23	5.32	13.92
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.				