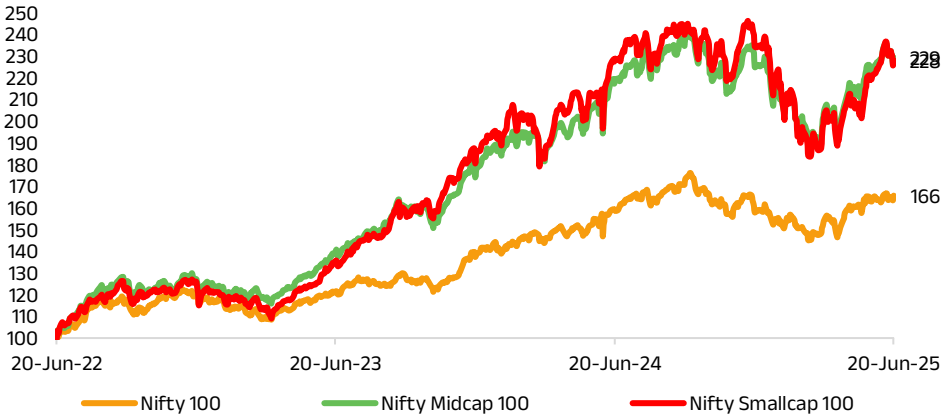


Broad Indices Historical Movement



Source: NSE

Broad Indices

	20-Jun-25	1 Day	1 Week	1 Month
Nifty 50	25,112.40	1.29%	1.59%	1.74%
Nifty 100	25,648.80	1.30%	1.25%	1.58%
Nifty 200	13,959.60	1.32%	0.97%	1.86%
Nifty 500	23,041.10	1.22%	0.59%	2.02%
Nifty Large Midcap 250	16,150.70	1.27%	0.25%	2.30%
Nifty Midcap 150	21,285.45	1.25%	-0.69%	3.00%
Nifty Next 50	66,733.05	1.34%	-0.37%	0.86%
Nifty Smallcap 250	16,916.95	0.62%	-1.71%	3.35%

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

Smart Beta Index

Index	20-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,506.45	1.71%	1.56%	4.47%
NIFTY 500 Value 50	13,828.20	1.17%	-0.56%	-0.01%
Nifty 200 Quality 30	20,706.15	0.95%	0.48%	1.20%
Nifty 50 Equal Weight	31,398.50	1.14%	1.21%	1.79%
NIFTY Alpha Low Volatility 30	26,747.85	0.68%	0.51%	1.24%
Nifty High Beta 50	3,692.25	1.77%	-1.13%	2.14%
Nifty Low Volatility 50	24,968.15	0.78%	0.83%	0.85%
Nifty Midcap150 Momentum 50	62,438.15	1.84%	0.34%	4.33%
Nifty PSE	9,884.80	1.53%	-0.02%	0.37%
Nifty SME Emerge	14,553.54	0.98%	-0.31%	2.78%
Nifty 100 ESG	4,904.40	1.21%	0.74%	1.61%

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

Sector Indices

Index	20-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,679.35	1.04%	1.51%	0.63%
Nifty Bank	56,252.85	1.22%	1.31%	2.51%
Nifty Consumption	11,620.95	1.49%	2.17%	1.59%
Nifty Financial	26,648.70	1.33%	1.19%	1.74%
Nifty FMCG	54,630.95	0.64%	0.19%	-2.80%
Nifty Healthcare	14,112.95	1.07%	-1.51%	1.33%
Nifty IT	38,991.45	0.84%	1.36%	4.58%
Nifty Media	1,674.80	0.35%	-2.97%	1.58%
Nifty Metal	9,138.60	1.09%	-1.30%	-0.19%
Nifty MNC	28,210.05	0.67%	0.09%	1.29%
Nifty Pharma	21,613.00	0.80%	-1.69%	0.73%
Nifty Realty	1,013.65	2.11%	0.66%	9.85%
Nifty Energy	35,600.20	0.93%	-0.39%	0.47%

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

Nifty 50 Top 5 Gainers

Company	20-Jun-25	Prev_Day	% Change	1 Week
Bharti Airtel	1,936.70	1,877.00	3.18	5.23
M&M	3,184.40	3,094.80	2.90	5.93
Power Grid	293.10	286.45	2.32	2.66
RIL	1,466.20	1,433.30	2.30	2.68
HDFC Standard Life Insurance C	778.95	761.85	2.24	3.47

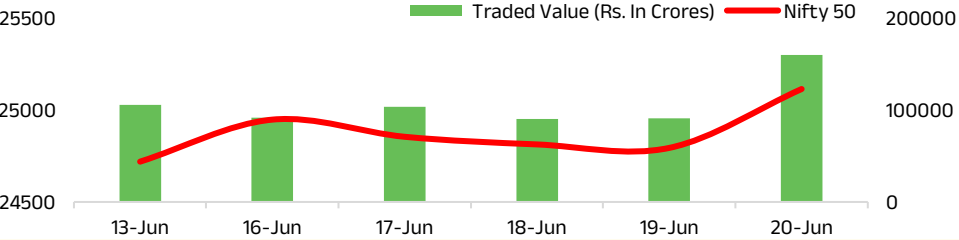
Source: NSE

Nifty 50 Top 5 Losers

Company	20-Jun-25	Prev_Day	% Change	1 Week
Shree Cements Limited	28,875.00	29310	-1.48	-2.48
Bajaj Auto	8,371.00	8496	-1.47	-1.09
Hero Moto	4,338.50	4384	-1.04	0.11
Maruti	12,791.00	12806	-0.12	3.09
Indian Oil	138.65	139	-0.01	-1.20

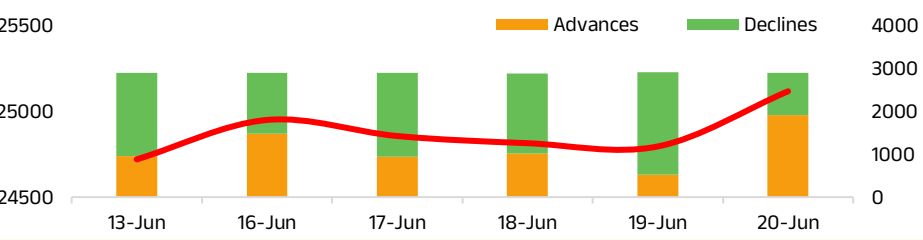
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

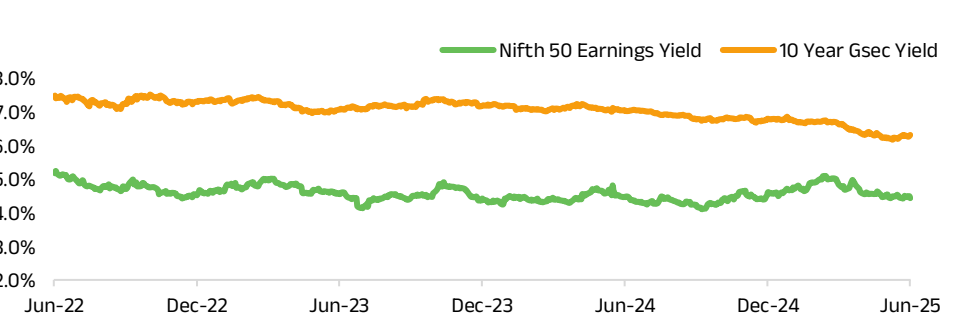
Indian equity markets snapped their three-day losing streak and rallied, buoyed by signs of easing tensions in the Iran-Israel conflict. Optimism grew after the U.S. President signaled a two-week window before any direct intervention, raising hopes for diplomatic negotiations.

Delhivery, the largest integrated logistics provider in India, has ventured into the short-haul parcel delivery market by introducing its on-demand intracity shipping service. Known as Delhivery Direct, this service is presently active in the Delhi-NCR and Bengaluru regions.

Hindustan Petroleum Corp Ltd (HPCL) plans to allocate approximately Rs. 20 billion (\$231.04 million) over the next two to three years for the establishment of 24 compressed biogas (CBG) plants.

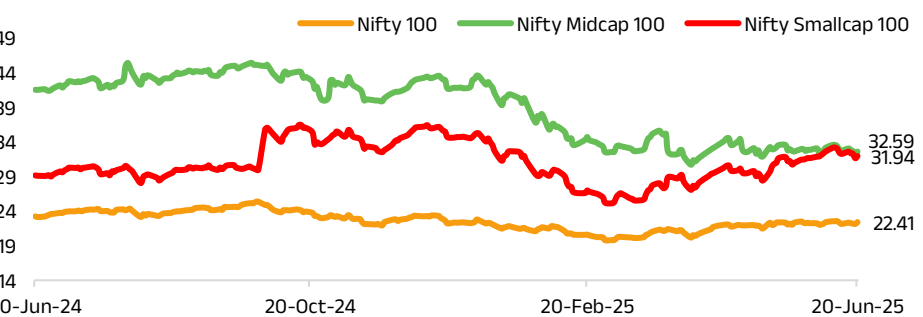
Axiscades announced that it has entered into an agreement with the European missile systems giant MBDA to establish a defense facility in Karnataka.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



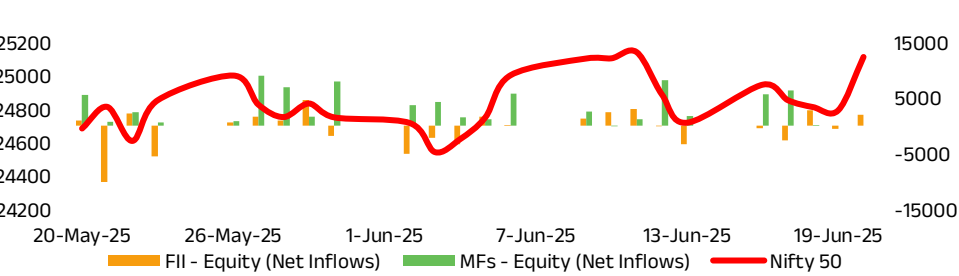
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	2040	-4,192	19,892	-96,682
MF**	94.58	42,419	116,551	228,683
DII	-3049.88	56,786	149,408	335,292

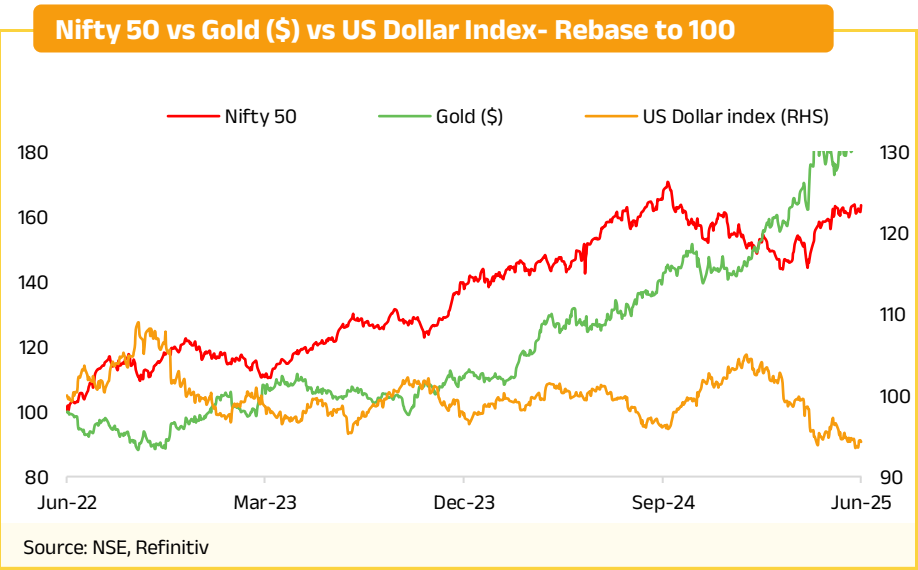
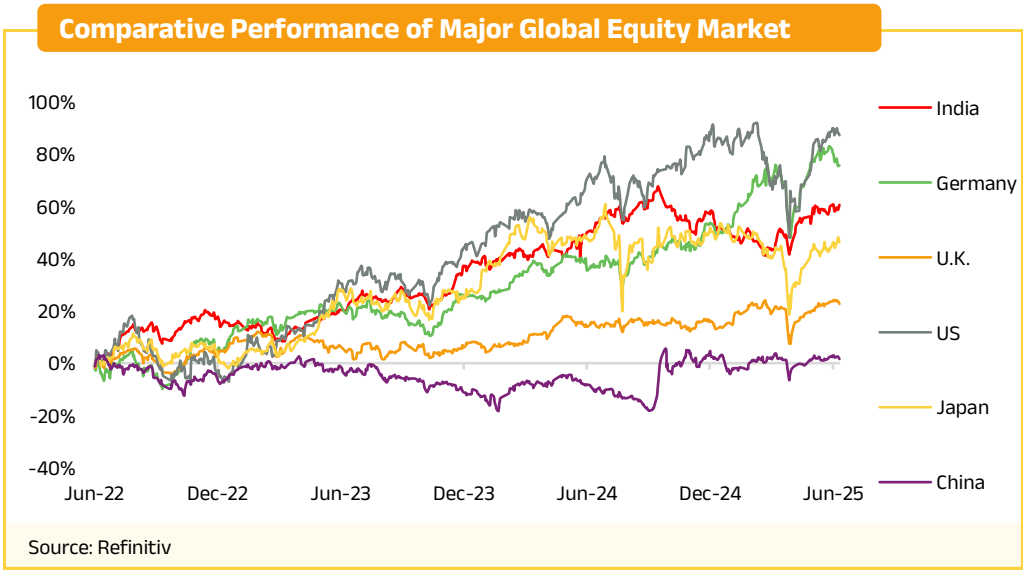
Source: SEBI, NSDL;**As on 18th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25111.70	24803.10	1.24%
Near Basis	-0.70	9.85	-107.11%
Mid Futures	25201.20	24915.50	1.15%
Mid Basis	88.80	122.25	-27.36%
Near Open Interest (Cr.)	1.09	1.11	-1.93%
Mid Open Interest (Cr.)	0.72	0.66	9.28%
Rollover (%)	42.54	39.60	7.44%
Put Call Ratio (OI)	1.16	0.98	18.15%
Put Call Ratio(Vol)	0.76	0.96	-20.68%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3313	2886	31392
Index Options	3392733	3358280	325360
Stock Futures	18574	18160	384289
Stock Options	81054	79444	113177
Total	3495674	3458770	854217
Source: NSE			

Global Equity Market				
Global Indices	20-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3266.67	-0.22%	-0.09%	0.41%
Nasdaq 100 (U.S.)	21626.39	-0.43%	-0.02%	1.21%
FTSE (U.K.)	8774.65	-0.20%	-0.86%	-0.07%
DAX Index (Germany)	23350.55	1.27%	-0.70%	-2.85%
CAC 40 Index (France)	7589.66	0.48%	-1.24%	-4.44%
SSE Composite (China)	3359.90	-0.07%	-0.51%	-0.61%
Nikkei (Japan)	38403.23	-0.22%	1.50%	2.33%
Kospi (South Korea)	3021.84	1.48%	4.40%	16.14%
HangSeng (Hong Kong)	23530.48	1.26%	-1.52%	-0.64%
Strait Times (Singapore)	3883.43	-0.28%	-0.72%	0.02%
Ibovespa Sao Paulo (Brazil)	137115.83	-1.15%	-0.07%	-2.14%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8505.50	-0.21%	-0.49%	1.94%
Jakarta Composite (Indonesia)	6907.14	-0.88%	-3.61%	-2.64%
KLSE (Malaysia)	1502.74	0.09%	-1.01%	-2.98%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	20-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,305	-0.59%	-0.43%	5.49%
Gold (\$/oz)	3,367.98	-0.07%	-1.87%	2.40%
Silver (INR/1 kg)	106,478	-0.71%	0.53%	11.64%
Silver (\$/oz)	35.99	-1.09%	-0.83%	8.83%
Brent Crude(\$/bbl)	79.75	-2.82%	5.27%	19.64%
Crude Oil (INR/1 bbl)	6,485.00	0.00%	10.91%	21.01%
NYMEX Crude(\$/bbl)	75.52	-0.22%	2.55%	18.43%
Natural Gas (INR/1 mmbtu)	344.30	0.00%	15.65%	29.39%
Aluminium (INR/1 kg)	245.30	-0.22%	1.26%	3.07%
Copper (INR/1 kg)	881.35	0.31%	0.73%	2.38%
Nickel (INR/1 kg)	1,316.80	-0.24%	-0.11%	-1.75%
Lead (INR/1 kg)	186.85	0.73%	0.73%	3.63%
Zinc (INR/1 kg)	255.75	0.14%	0.85%	-2.05%
Mentha Oil (INR/1 kg)	947.80	0.52%	-0.13%	-3.80%
Baltic Dry Index	1,689	-3.54%	-14.18%	26.04%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.93	3.49	4.70	20.17
Mid Cap Fund	3.49	-0.68	2.76	27.81
Large & Mid Cap Fund	2.73	0.97	4.11	24.38
Small Cap Fund	2.76	-4.93	1.55	27.21
Multi Cap Fund	2.51	-0.31	3.08	25.58
Focused Fund	2.24	1.56	4.33	21.51
Value Fund	1.61	0.42	1.95	25.71
Contra Fund	1.56	0.51	3.48	26.47
ELSS	2.36	0.73	3.21	23.07
Equity Savings	0.90	3.08	6.70	11.52
Arbitrage Fund	0.68	3.32	6.78	6.64
Dividend Yield Fund	1.40	1.08	1.63	24.77
Aggressive Hybrid Fund	1.69	2.45	5.55	18.79
Balanced Advantage	1.28	2.47	5.10	14.73
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.				