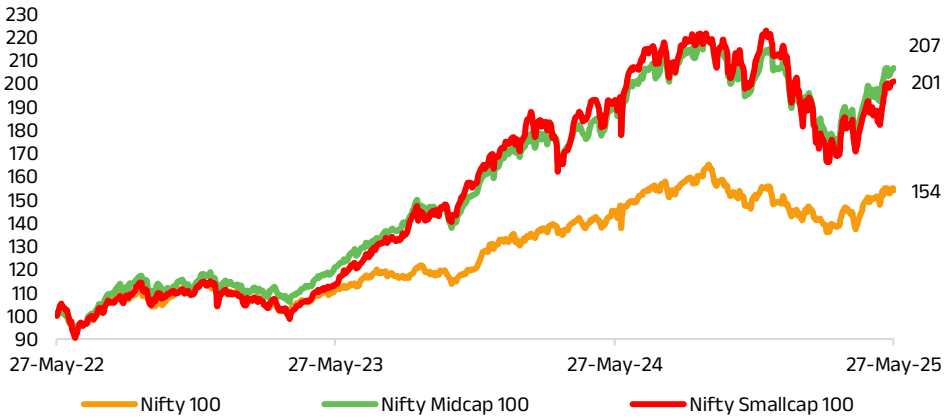


Broad Indices Historical Movement



Source: NSE

Broad Indices

	27-May-25	1 Day	1 Week	1 Month
Nifty 50	24,826.20	-0.70%	0.58%	3.27%
Nifty 100	25,436.35	-0.63%	0.74%	3.48%
Nifty 200	13,829.30	-0.50%	0.91%	4.00%
Nifty 500	22,816.50	-0.40%	1.02%	4.43%
Nifty Large Midcap 250	15,987.95	-0.20%	1.27%	5.15%
Nifty Midcap 150	21,034.45	0.21%	1.79%	6.80%
Nifty Next 50	67,190.75	-0.27%	1.55%	4.47%
Nifty Smallcap 250	16,637.85	0.11%	1.64%	7.17%

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

Smart Beta Index

Index	27-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,426.65	-0.44%	0.89%	5.57%
NIFTY 500 Value 50	13,914.45	-0.37%	0.62%	3.88%
Nifty 200 Quality 30	20,708.70	-0.37%	1.21%	5.39%
Nifty 50 Equal Weight	31,139.75	-0.45%	0.95%	3.66%
NIFTY Alpha Low Volatility 30	26,582.05	-0.51%	0.61%	2.25%
Nifty High Beta 50	3,703.10	0.34%	2.44%	8.24%
Nifty Low Volatility 50	24,905.95	-0.49%	0.59%	2.12%
Nifty Midcap150 Momentum 50	60,638.60	-0.11%	1.32%	6.45%
Nifty PSE	9,975.85	-0.35%	1.29%	5.34%
Nifty SME Emerge	14,206.91	0.17%	0.34%	2.65%
Nifty 100 ESG	4,878.90	-0.50%	1.08%	3.88%

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

Sector Indices

Index	27-May-25	1 Day	1 Week	1 Month
Nifty Auto	23,596.90	-0.70%	0.28%	7.29%
Nifty Bank	55,352.80	-0.39%	0.87%	1.26%
Nifty Consumption	11,510.15	-0.65%	0.63%	2.34%
Nifty Financial	26,420.80	-0.64%	0.87%	1.48%
Nifty FMCG	56,547.60	-0.88%	0.61%	0.03%
Nifty Healthcare	14,005.20	-0.05%	0.56%	1.27%
Nifty IT	37,501.45	-0.75%	0.58%	5.45%
Nifty Media	1,690.00	-0.09%	2.50%	9.19%
Nifty Metal	9,294.95	-0.44%	1.52%	8.46%
Nifty MNC	28,219.60	0.12%	1.32%	5.44%
Nifty Pharma	21,524.95	0.11%	0.32%	0.20%
Nifty Realty	946.30	0.24%	2.55%	10.12%
Nifty Energy	35,880.90	0.00%	1.26%	5.67%

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

Nifty 50 Top 5 Gainers

Company	27-May-25	Prev_Day	% Change	1 Week
IndusInd Bank	820.70	800.10	2.57	4.92
Sun Pharma	1,683.40	1,676.10	0.44	-1.43
Adani Ports & SEZ	1,404.20	1,400.20	0.29	1.42
SBI Life Insurance Company Lim	1,803.30	1,801.60	0.09	2.59
Bajaj Auto	8,963.00	8,958.50	0.05	4.65

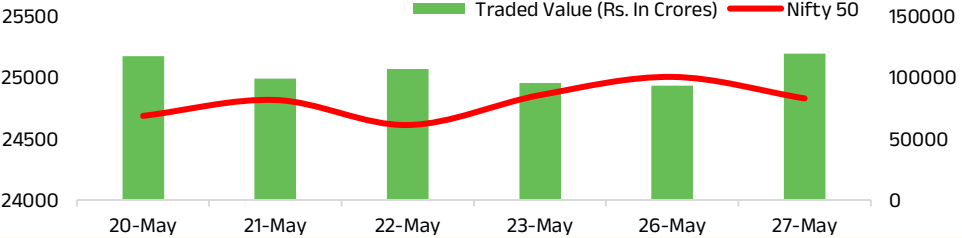
Source: NSE

Nifty 50 Top 5 Losers

Company	27-May-25	Prev_Day	% Change	1 Week
Ultratech Cem	11,421.00	11689	-2.29	-2.36
ITC	433.90	443	-2.03	-0.23
BPCL	317.00	323	-1.84	1.31
JSW Steel	1,013.70	1032	-1.80	0.10
Tata Motors	716.45	729	-1.72	-0.34

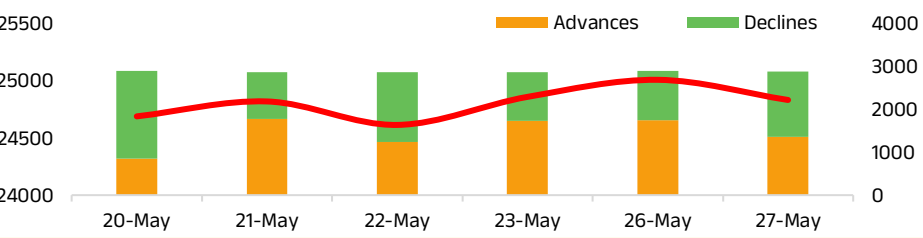
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

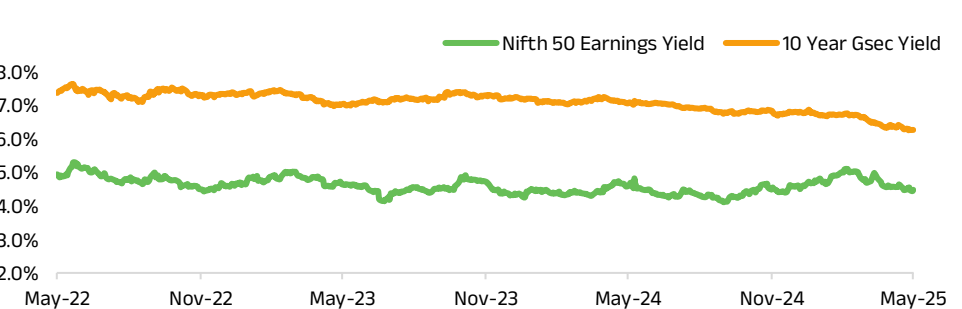
Indian equity markets declined due to persistent concerns over U.S. fiscal challenges and renewed selling by foreign institutional investors (FIIs). Additionally, signs of moderating corporate earnings growth, elevated valuations, delays in finalizing the India-U.S. trade agreement, and rising COVID-19 cases across Southeast Asia prompted profit booking at higher levels after two consecutive days of gains.

Marwadi Chandarana Intermediaries Brokers has finalized an agreement to obtain a 75% ownership in the non-banking financial entity TruCap Finance, involving an investment of Rs. 207 crore. This investment comprises a combination of capital infusion via the preferential allotment of equity shares and convertible warrants, along with a secondary acquisition of 3.68 crore shares from the current promoter group of TruCap.

SBI Life Insurance and Vidyaniti LLP have acquired a 4.25% stake in National Highways Infra Trust for Rs. 1,100 crore through an open market transaction, while NHAI has divested 8.24 crore units in the Trust. Both entities collectively acquired a total of 8.24 crore units, which corresponds to a 4.25% stake. SBI Life Insurance Company purchased over 3.74 crore units, equating to a 1.93% holding in NHIT.

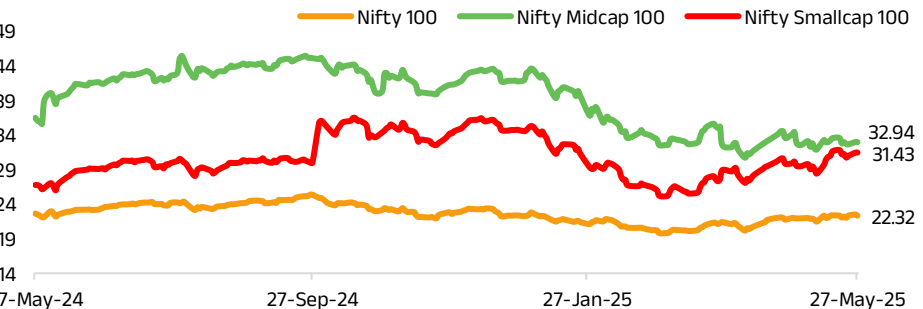
Sumadhura Group has entered the co-working sector by launching its inaugural center in Bengaluru, which spans an area of 1.3 lakh square feet, in response to the significant demand for managed flexible workspaces from corporate clients.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



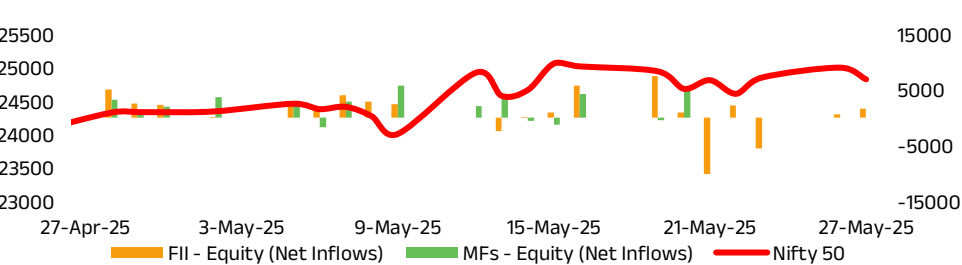
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FIIs & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	INR Cr.
				YTD
FII	1586.48	16,016	20,239	-96,335
MF**	5602.41	26,942	43,985	156,118
DII	10104.66	46,348	74,576	260,460

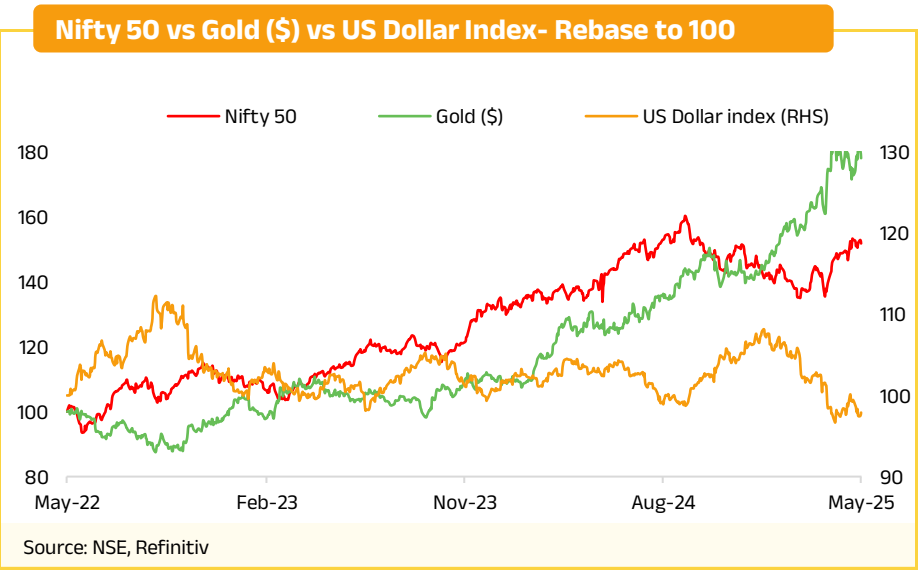
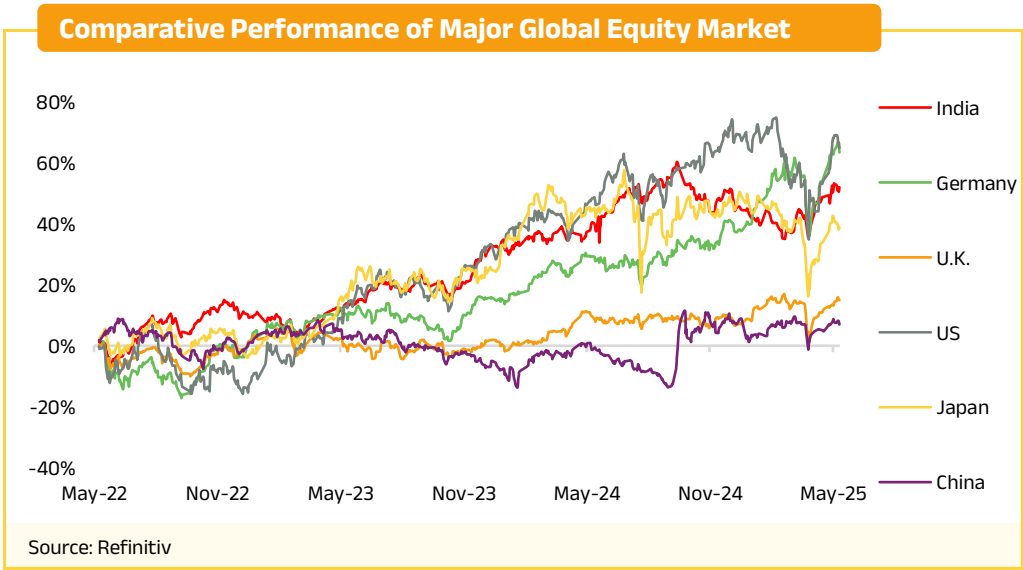
Source: SEBI, NSDL;\*\*As on 20th May 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24862.60	25035.90	-0.69%
Near Basis	36.40	34.75	4.75%
Mid Futures	24963.40	25127.70	-0.65%
Mid Basis	137.20	126.55	8.42%
Near Open Interest (Cr.)	0.77	0.94	-18.40%
Mid Open Interest (Cr.)	1.02	0.94	8.96%
Rollover (%)	59.94	52.28	14.64%
Put Call Ratio (OI)	0.82	1.06	-22.90%
Put Call Ratio(Vol)	0.82	0.95	-14.01%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	6712	6147	29950
Index Options	1140855	1093765	564188
Stock Futures	136736	134575	386514
Stock Options	89516	82459	128673
Total	1373819	1316946	1109325
Source: NSE			

Global Equity Market				
Global Indices	27-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3242.20	2.05%	-0.34%	7.30%
Nasdaq 100 (U.S.)	21414.99	2.39%	0.22%	10.20%
FTSE (U.K.)	8778.05	0.69%	-0.03%	4.31%
DAX Index (Germany)	24226.49	0.83%	0.79%	8.92%
CAC 40 Index (France)	7826.79	-0.02%	-1.46%	3.86%
SSE Composite (China)	3340.69	-0.18%	-1.18%	1.38%
Nikkei (Japan)	37724.11	0.51%	0.52%	5.65%
Kospi (South Korea)	2637.22	-0.27%	1.36%	3.57%
HangSeng (Hong Kong)	23381.99	0.43%	-1.26%	6.37%
Strait Times (Singapore)	3896.09	0.53%	0.35%	1.89%
Ibovespa Sao Paulo (Brazil)	139541.23	1.02%	-0.41%	3.56%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8407.60	0.56%	0.77%	5.51%
Jakarta Composite (Indonesia)	7198.97	0.15%	1.47%	7.79%
KLSE (Malaysia)	1526.16	-0.53%	-1.47%	1.12%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	27-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	94,936	-0.58%	1.87%	-0.32%
Gold (\$/oz)	3,299.56	-1.29%	0.32%	-0.56%
Silver (INR/1 kg)	96,661	-0.51%	1.35%	-0.80%
Silver (\$/oz)	33.30	-0.15%	0.70%	0.67%
Brent Crude(\$/bbl)	65.25	-1.60%	-2.12%	-6.24%
Crude Oil (INR/1 bbl)	5,272.00	0.00%	-1.62%	-1.81%
NYMEX Crude(\$/bbl)	61.41	-2.04%	-3.70%	-3.67%
Natural Gas (INR/1 mmbtu)	285.70	0.00%	7.37%	14.05%
Aluminium (INR/1 kg)	237.30	-0.29%	-0.29%	0.74%
Copper (INR/1 kg)	864.15	0.25%	0.38%	1.35%
Nickel (INR/1 kg)	1,334.20	-1.28%	-0.45%	-1.82%
Lead (INR/1 kg)	181.45	-1.52%	0.64%	-1.28%
Zinc (INR/1 kg)	259.50	-0.35%	-0.61%	0.93%
Mentha Oil (INR/1 kg)	984.80	-0.02%	-0.04%	-0.93%
Baltic Dry Index <sup>[1]</sup>	1,340	-0.07%	0.00%	-2.40%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Securities Transaction Tax

Definition: Securities Transaction Tax (STT) refers to the tax levied on transaction (purchase or sale) of securities listed on the Indian stock exchange. Such securities include equity shares, derivatives and equity-oriented mutual fund units. The rate is specified by the Central Government from time to time.



Explanation

STT is levied at the rate of 0.100% on purchase or sale of equity shares in a company, where such contract is settled by the actual delivery or transfer of such share or unit. However, for sale of a unit of an equity-oriented fund, where such contract is settled by the actual delivery or transfer of such share or unit, the rate has been revised to 0.001% with effect from June 1, 2013. The same shall be borne by the seller. Meanwhile, the rate of STT is 0.025% for sale of equity shares or a unit of equity-oriented fund, where such contract is settled other than by the actual delivery or transfer of such share or unit.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.20	0.21	6.77	17.23
Mid Cap Fund	6.42	-1.77	7.30	24.58
Large & Mid Cap Fund	4.89	-0.87	7.80	21.28
Small Cap Fund	6.42	-5.41	7.17	23.95
Multi Cap Fund	4.99	-1.88	6.88	22.44
Focused Fund	4.22	-1.03	7.52	18.60
Value Fund	4.49	-1.74	5.48	22.50
Contra Fund	3.94	-1.53	7.25	23.67
ELSS	4.58	-1.47	6.69	20.01
Equity Savings	1.52	2.66	7.98	10.54
Arbitrage Fund	0.26	3.26	6.90	6.50
Dividend Yield Fund	3.87	-1.91	4.92	21.97
Aggressive Hybrid Fund	3.32	0.89	8.13	16.58
Balanced Advantage	2.41	1.28	6.58	13.20
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 23 May, 2025