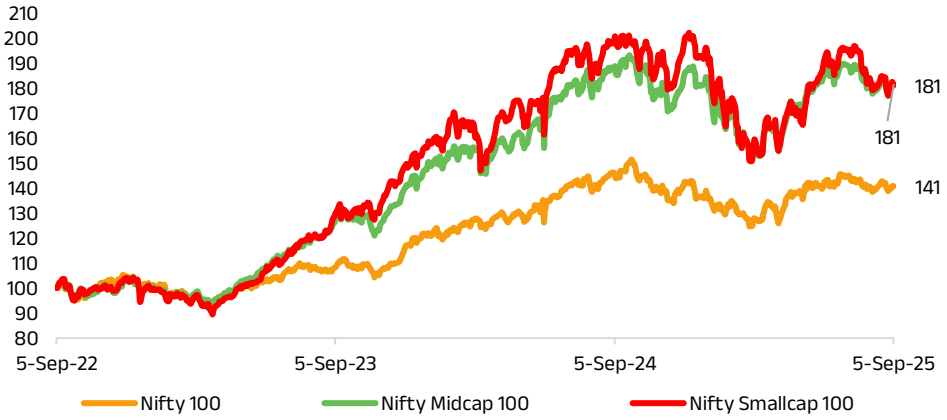


Broad Indices Historical Movement



Source: NSE

Broad Indices

	5-Sep-25	1 Day	1 Week	1 Month
Nifty 50	24,741.00	0.03%	1.29%	0.37%
Nifty 100	25,356.85	0.01%	1.42%	0.39%
Nifty 200	13,790.05	0.04%	1.58%	0.29%
Nifty 500	22,829.15	0.04%	1.63%	0.13%
Nifty Large Midcap 250	16,016.55	0.04%	1.72%	-0.08%
Nifty Midcap 150	21,172.65	0.07%	2.04%	-0.55%
Nifty Next 50	67,089.80	-0.09%	2.04%	0.49%
Nifty Smallcap 250	16,904.25	0.23%	2.41%	-0.41%

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

Smart Beta Index

Index	5-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,150.75	0.25%	1.73%	-0.10%
NIFTY 500 Value 50	13,974.65	0.41%	2.97%	1.21%
Nifty 200 Quality 30	20,726.20	-0.61%	1.71%	2.29%
Nifty 50 Equal Weight	31,681.25	0.06%	1.88%	2.21%
NIFTY Alpha Low Volatility 30	26,363.60	-0.28%	0.93%	0.68%
Nifty High Beta 50	3,566.75	0.68%	3.15%	-2.40%
Nifty Low Volatility 50	25,056.40	-0.41%	1.06%	1.77%
Nifty Midcap150 Momentum 50	60,142.95	-0.07%	1.23%	-1.58%
Nifty PSE	9,405.10	0.09%	2.20%	-2.27%
Nifty SME Emerge	15,266.34	0.55%	1.07%	2.12%
Nifty 100 ESG	4,913.05	-0.02%	1.52%	1.08%

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

Sector Indices

Index	5-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	26,320.60	1.25%	5.45%	10.24%
Nifty Bank	54,114.55	0.07%	0.86%	-2.25%
Nifty Consumption	12,370.55	0.10%	2.58%	4.92%
Nifty Financial	25,889.30	0.14%	1.26%	-1.84%
Nifty FMCG	56,292.10	-1.42%	0.27%	1.00%
Nifty Healthcare	14,487.85	-0.02%	0.96%	0.04%
Nifty IT	34,635.85	-1.44%	-1.55%	-1.14%
Nifty Media	1,620.45	0.59%	0.52%	-1.20%
Nifty Metal	9,681.65	0.68%	5.75%	3.70%
Nifty MNC	29,873.05	0.18%	1.83%	4.02%
Nifty Pharma	21,924.80	0.04%	0.55%	-0.21%
Nifty Realty	872.50	-1.16%	0.20%	-3.89%
Nifty Energy	34,297.90	0.04%	1.96%	-1.77%

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

Nifty 50 Top 5 Gainers

Company	5-Sep-25	Prev_Day	% Change	1 Week
Eicher Motors Limited	6,580.50	6,425.00	2.42	7.82
M&M	3,561.30	3,481.50	2.29	11.31
Maruti	14,895.00	14,662.00	1.59	0.70
Power Grid	285.35	281.80	1.26	3.67
RIL	1,375.00	1,359.30	1.16	1.31

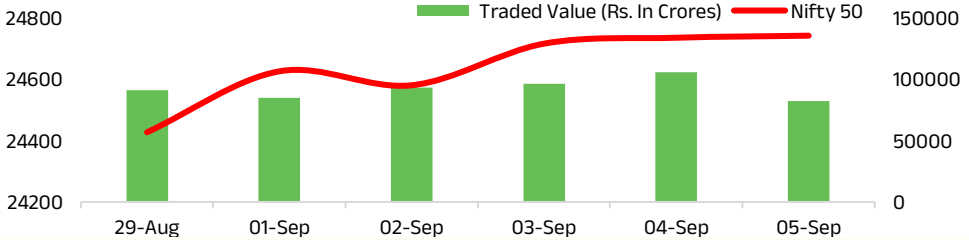
Source: NSE

Nifty 50 Top 5 Losers

Company	5-Sep-25	Prev_Day	% Change	1 Week
ITC	407.35	416	-2.06	-0.59
Divi's Lab	6,009.00	6134	-2.03	-2.00
HCL Tech	1,419.00	1443	-1.68	-2.46
Cipla	1,553.40	1578	-1.55	-2.27
TCS	3,048.30	3096	-1.53	-1.18

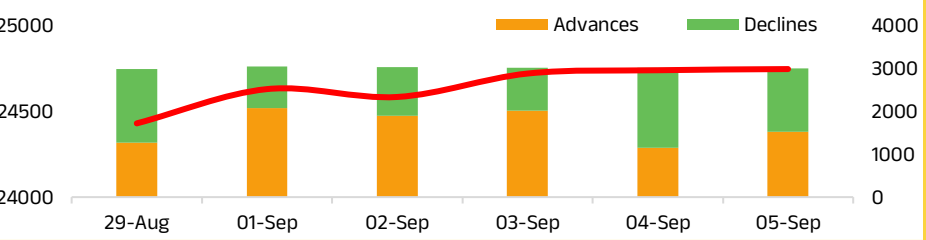
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

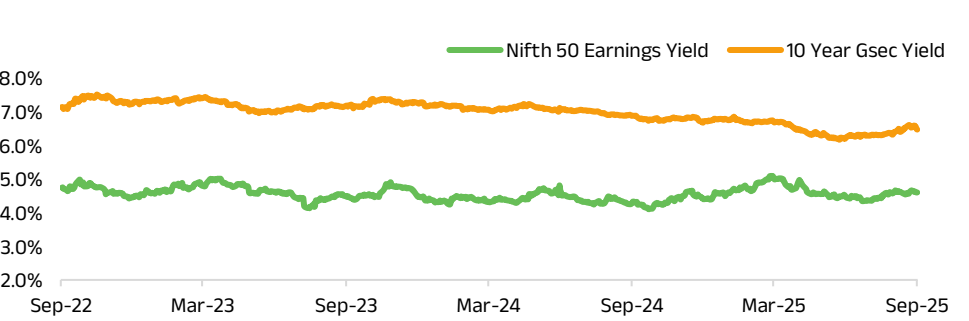
Indian equity markets erased early gains and fluctuated throughout the session before closing with little change, despite optimism over GST reforms and firm cues from global markets amid growing expectations of interest rate cut later this month by the U.S. Federal Reserve.

Shriram Properties has signed a joint development agreement for 6.5 acres in North Bengaluru to launch a premium residential project with a potential Gross Development Value (GDV) of Rs. 500 crore.

L&T Semiconductor Technologies announced that it has acquired the power module design assets of Fujitsu General Electronics, Japan. As part of the deal, L&T Semiconductor Technologies (LT SCT) has acquired R&D equipment, design patents, and various intellectual properties related to power module technologies from Fujitsu General Electronics (FGEL).

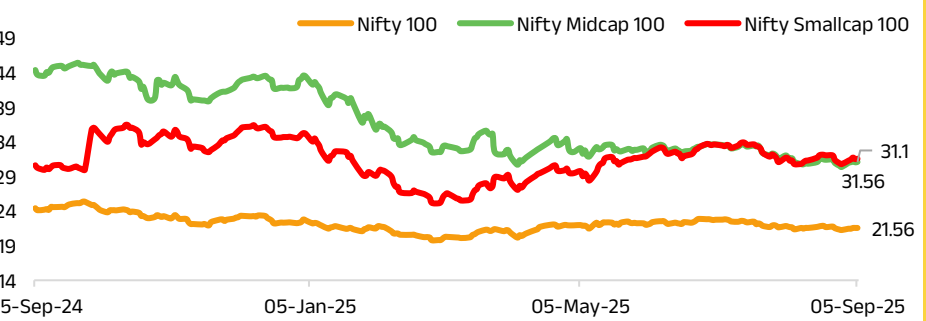
Vedanta outbid Adani's Group to emerge as the winning bidder for the acquisition of debt-ridden Jaiprakash Associates (JAL) with an offer of Rs. 17,000 crore, according to reports. The bid value translates to a net present value (NPV) of ₹12,505 crore for Jaiprakash Associates.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



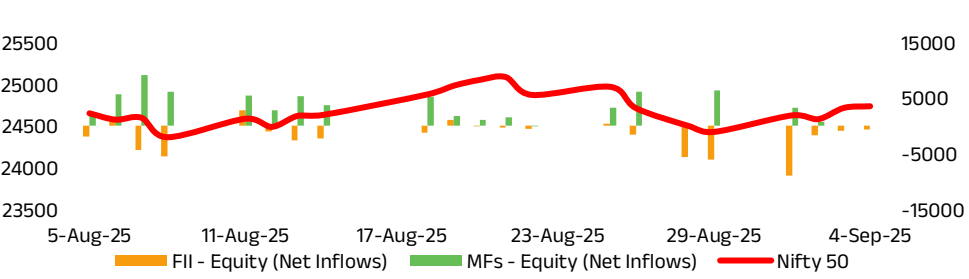
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	-684.88	-12,257	-64,991	-142,891
MF**	673.47	3,953	121,506	352,574
DII	1821.23	13,444	169,212	517,687

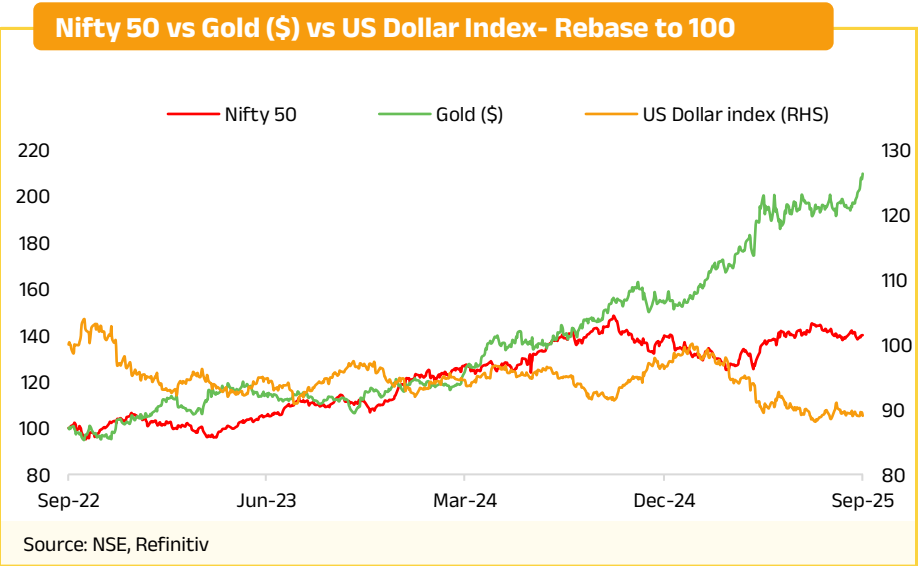
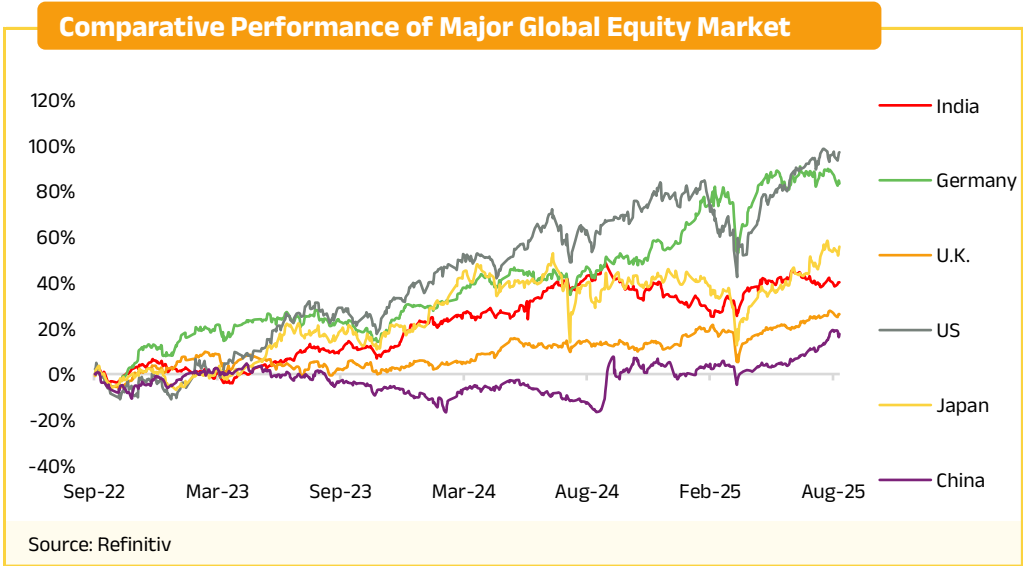
Source: SEBI, NSDL;\*As on 4th Sep 2025;\*\*As on 2nd Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24847.70	24827.50	0.08%
Near Basis	106.70	93.20	14.49%
Mid Futures	24964.50	24947.80	0.07%
Mid Basis	223.50	213.50	4.68%
Near Open Interest (Cr.)	1.71	1.70	0.82%
Mid Open Interest (Cr.)	0.12	0.11	7.48%
Rollover (%)	7.58	7.18	5.60%
Put Call Ratio (OI)	0.87	0.84	2.55%
Put Call Ratio(Vol)	1.00	1.01	-1.10%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2290	3352	41801
Index Options	2297589	2300212	331740
Stock Futures	19393	21400	377360
Stock Options	18416	18700	20384
Total	2337688	2343663	771285
Source: NSE			

Global Equity Market				
Global Indices	5-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3551.17	-0.24%	0.39%	3.02%
Nasdaq 100 (U.S.)	23652.44	0.08%	1.01%	2.75%
FTSE (U.K.)	9208.21	-0.09%	0.23%	0.72%
DAX Index (Germany)	23596.98	-0.73%	-1.28%	-1.04%
CAC 40 Index (France)	7674.78	-0.31%	-0.38%	0.71%
SSE Composite (China)	3812.51	1.24%	-1.18%	5.39%
Nikkei (Japan)	43018.75	1.03%	0.70%	6.09%
Kospi (South Korea)	3205.12	0.13%	0.60%	0.22%
HangSeng (Hong Kong)	25417.98	1.43%	1.36%	2.07%
Strait Times (Singapore)	4307.08	0.24%	0.88%	2.34%
Ibovespa Sao Paulo (Brazil)	142640.14	1.17%	0.86%	7.13%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8871.20	0.51%	-1.14%	1.15%
Jakarta Composite (Indonesia) <sup>[1]</sup>	7867.35	-0.23%	0.47%	4.69%
KLSE (Malaysia)	1578.15	0.00%	0.19%	2.57%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	5-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	105,967	0.38%	3.92%	6.22%
Gold (\$/oz)	3,586.36	1.16%	4.05%	6.08%
Silver (INR/1 kg)	123,238	-0.08%	4.91%	9.94%
Silver (\$/oz)	40.98	0.76%	3.30%	8.31%
Brent Crude(\$/bbl)	64.00	-3.96%	-6.25%	-8.57%
Crude Oil (INR/1 bbl)	5,597.00	-0.69%	-1.17%	-3.50%
NYMEX Crude(\$/bbl)	62.07	-2.50%	-3.33%	-6.10%
Natural Gas (INR/1 mmbtu)	271.00	0.37%	5.00%	5.61%
Aluminium (INR/1 kg)	255.90	0.29%	0.12%	1.31%
Copper (INR/1 kg)	905.60	0.29%	0.42%	2.17%
Nickel (INR/1 kg)	1,350.00	0.97%	-0.63%	1.81%
Lead (INR/1 kg)	184.85	-0.27%	-0.16%	-0.14%
Zinc (INR/1 kg)	277.70	0.69%	0.85%	2.45%
Mentha Oil (INR/1 kg)	1,019.00	-1.68%	-0.61%	2.65%
Baltic Dry Index	1,979	0.82%	-2.27%	3.02%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Return on Equity (ROE) vs Return on Capital Employed (ROCE)

Definition: ROE measures the profitability of a company relative to its **shareholders’** equity, while ROCE evaluates profitability relative to total capital employed (equity plus debt).



Explanation

ROE = Net Income ÷ **Shareholders’** Equity, and it shows how efficiently a company uses equity capital to generate profits. ROCE = EBIT ÷ (Equity + Debt – Current Liabilities), and it reflects how well the company uses all long-term funds. ROE can look high if a company is heavily leveraged, but ROCE adjusts for debt, making it a better indicator of overall capital efficiency. For example, Company X with ₹50 crore equity and ₹50 crore debt earning ₹15 crore EBIT will have a strong ROE, but ROCE will reveal the true efficiency of combined capital. Investors often compare both to understand leverage impact and operational performance.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.40	11.78	-2.52	13.99
Flexi Cap Fund	0.58	13.54	-3.05	15.72
Mid Cap Fund	0.32	16.30	-2.91	19.93
Large & Mid Cap Fund	0.25	14.06	-2.69	17.51
Small Cap Fund	-0.02	17.34	-5.63	19.64
Multi Cap Fund	0.46	14.46	-2.82	18.43
Focused Fund	0.34	12.46	-3.17	15.29
Value Fund	-0.09	11.44	-6.00	18.69
Contra Fund	0.38	12.42	-3.78	19.82
ELSS	0.15	13.77	-3.51	16.30
Equity Savings	0.37	6.41	4.22	9.67
Arbitrage Fund	0.34	3.11	6.43	6.77
Dividend Yield Fund	0.38	10.43	-6.49	18.63
Aggressive Hybrid Fund	0.07	11.02	-0.41	13.97
Balanced Advantage	0.14	8.33	0.20	11.30
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 04 Sep,