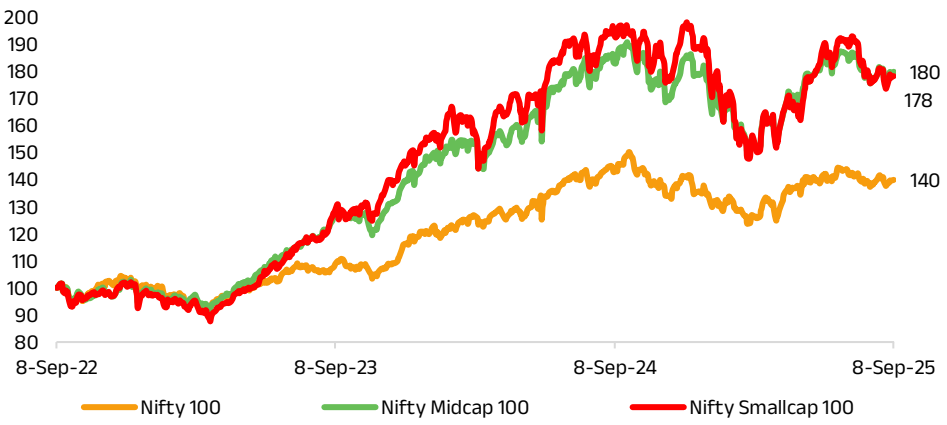


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-Sep-25	1 Day	1 Week	1 Month
Nifty 50	24,773.15	0.13%	0.60%	1.68%
Nifty 100	25,402.00	0.18%	0.68%	1.88%
Nifty 200	13,822.10	0.23%	0.72%	1.97%
Nifty 500	22,878.65	0.22%	0.73%	1.94%
Nifty Large Midcap 250	16,061.60	0.28%	0.68%	1.91%
Nifty Midcap 150	21,254.10	0.38%	0.67%	1.95%
Nifty Next 50	67,366.05	0.41%	1.04%	2.83%
Nifty Smallcap 250	16,935.15	0.18%	1.18%	2.38%

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

Smart Beta Index

Index	8-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,207.90	0.19%	0.51%	1.70%
NIFTY 500 Value 50	14,006.95	0.23%	1.53%	2.51%
Nifty 200 Quality 30	20,701.25	-0.12%	0.09%	3.12%
Nifty 50 Equal Weight	31,736.00	0.17%	0.83%	3.67%
NIFTY Alpha Low Volatility 30	26,365.20	0.01%	0.13%	2.10%
Nifty High Beta 50	3,594.05	0.77%	2.02%	1.70%
Nifty Low Volatility 50	25,042.70	-0.05%	0.10%	3.06%
Nifty Midcap150 Momentum 50	60,304.85	0.27%	-0.32%	0.88%
Nifty PSE	9,408.55	0.04%	0.45%	-1.27%
Nifty SME Emerge	15,349.64	0.55%	1.89%	3.62%
Nifty 100 ESG	4,924.65	0.24%	0.47%	2.71%

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

Sector Indices

Index	8-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	27,189.20	3.30%	5.96%	15.82%
Nifty Bank	54,186.90	0.13%	0.34%	-1.49%
Nifty Consumption	12,431.50	0.49%	1.83%	6.73%
Nifty Financial	25,942.70	0.21%	0.77%	-0.86%
Nifty FMCG	56,171.30	-0.21%	-0.01%	2.31%
Nifty Healthcare	14,430.00	-0.40%	0.28%	2.08%
Nifty IT	34,310.45	-0.94%	-4.00%	-0.26%
Nifty Media	1,621.20	0.05%	0.89%	-0.85%
Nifty Metal	9,717.85	0.37%	4.43%	6.24%
Nifty MNC	29,987.15	0.38%	1.28%	6.59%
Nifty Pharma	21,865.20	-0.27%	0.40%	2.16%
Nifty Realty	876.55	0.46%	-0.37%	0.27%
Nifty Energy	34,290.65	-0.02%	0.40%	-0.29%

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

Nifty 50 Top 5 Gainers

Company	8-Sep-25	Prev_Day	% Change	1 Week
Tata Motors	719.50	691.70	4.02	4.25
M&M	3,701.40	3,561.30	3.93	11.64
Bajaj Auto	9,433.50	9,084.50	3.84	5.20
Eicher Motors Limited	6,815.00	6,580.50	3.56	8.52
JSW Steel	1,101.40	1,073.10	2.64	6.36

Source: NSE

Nifty 50 Top 5 Losers

Company	8-Sep-25	Prev_Day	% Change	1 Week
Asian Paints	2,530.80	2580	-1.90	-1.53
Coal India	387.05	393	-1.43	2.42
SBI Life Insurance Comp	1,780.90	1805	-1.35	-1.60
Tech Mahindra	1,460.70	1478	-1.16	-2.98
HCL Tech	1,403.00	1419	-1.13	-4.45

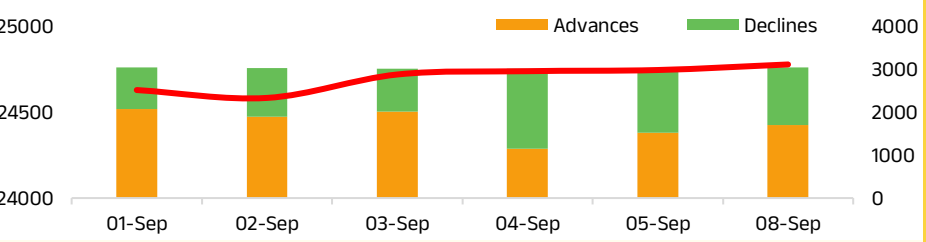
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

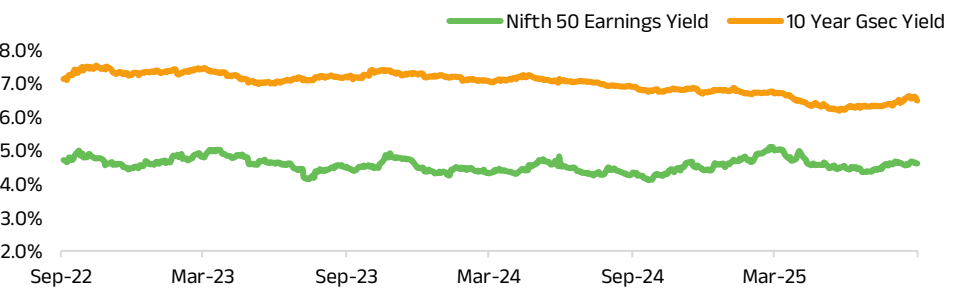
Indian equity markets rose marginally, despite mixed global cues and rising oil prices amid speculation of additional sanctions on Russia. Sentiment was partly supported by sustained optimism over potential GST rate cuts and expectations of a U.S. Federal Reserve rate cut later in Sep 2025.

ACME Solar has formally announced the placement of an order for a 2 GWh battery energy storage system with Chuzhou Lishen New Energy Technology Co. The procurement is being facilitated through Posco International Corporation and China FAW Group Import and Export Co.

Gautam Solar Private Ltd has announced plans to invest Rs. 4,000 crore in establishing a solar cell manufacturing facility in Gwalior, Madhya Pradesh. The facility, to be developed on a 4-acre site, will produce Tunnel Oxide Passivated Contact (TOPCon) solar cells, with a targeted production capacity of 5 GW.

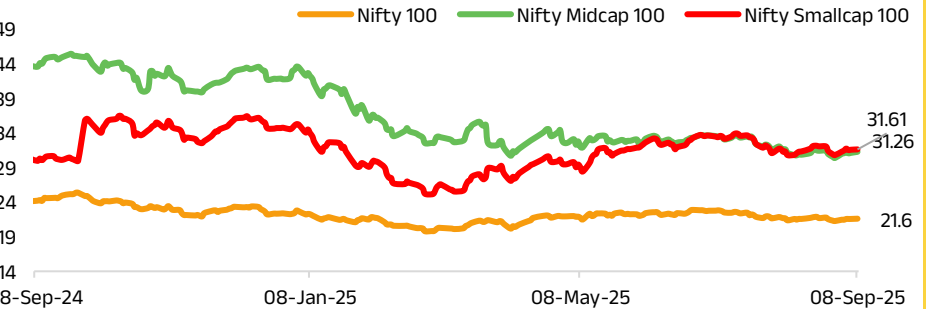
Invenia Tech has outlined its strategic focus on fiber deployment, system integration, and data center development. The company aims to capitalize on the rapid growth of India's telecom and digital sectors, supported by strong investor interest. Following its listing, it plans to expand its offerings in system integration, connectivity, and managed services across telecom, enterprise, and public sector segments.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



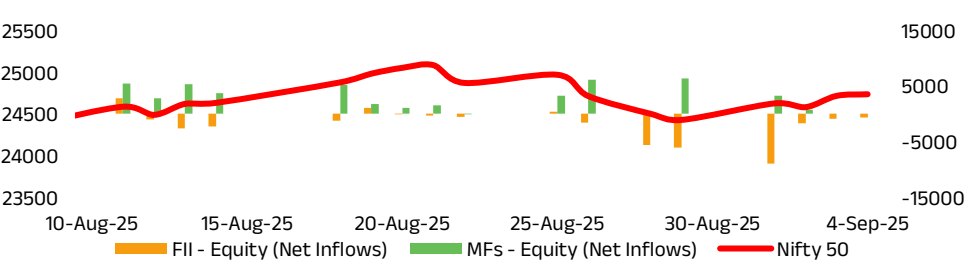
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	INR Cr.
				YTD
FII*	-684.88	-12,257	-64,991	-142,891
MF**	673.47	3,953	121,506	352,574
DII	3014.3	16,458	172,226	520,701

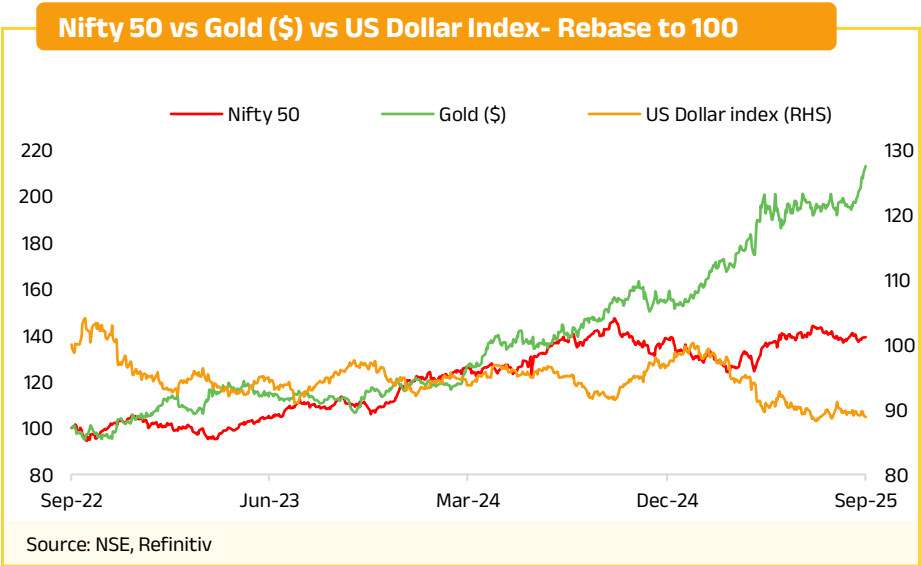
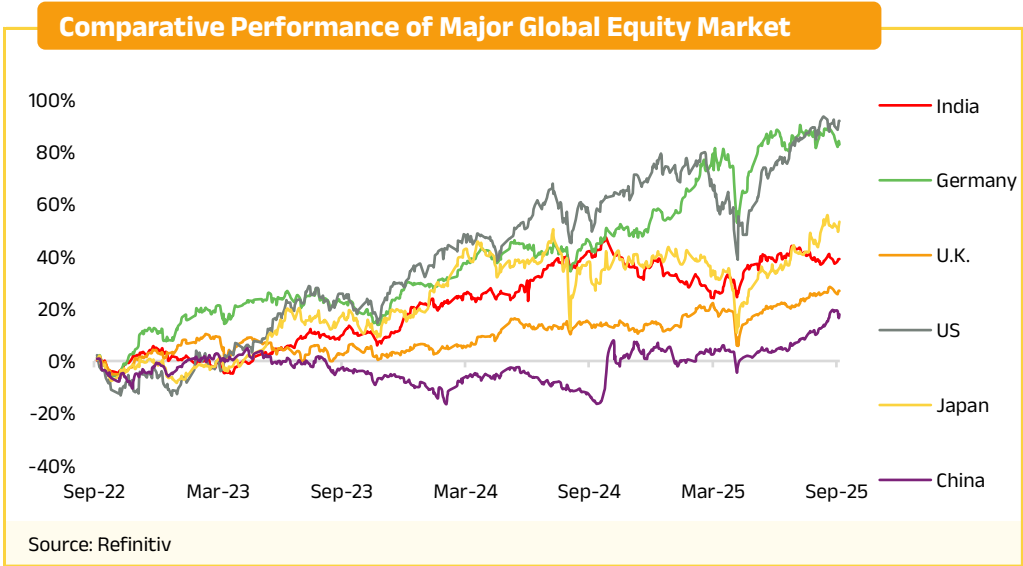
Source: SEBI, NSDL;*As on 4th Sep 2025;**As on 2nd Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24892.70	24847.70	0.18%
Near Basis	119.55	106.70	12.04%
Mid Futures	25007.40	24964.50	0.17%
Mid Basis	234.25	223.50	4.81%
Near Open Interest (Cr.)	1.70	1.71	-0.73%
Mid Open Interest (Cr.)	0.13	0.12	2.85%
Rollover (%)	8.11	7.58	7.07%
Put Call Ratio (OI)	0.95	0.87	10.08%
Put Call Ratio(Vol)	0.96	1.00	-3.93%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1988	2520	41880
Index Options	1642502	1643325	394531
Stock Futures	15772	15869	378309
Stock Options	19344	19969	22067
Total	1679607	1681684	836787
Source: NSE			

Global Equity Market				
Global Indices	8-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3560.48	0.26%	0.65%	1.96%
Nasdaq 100 (U.S.)	23762.30	0.46%	1.48%	0.64%
FTSE (U.K.)	9221.44	0.14%	0.27%	1.38%
DAX Index (Germany)	23807.13	0.89%	-0.96%	-1.47%
CAC 40 Index (France)	7734.84	0.78%	0.35%	-0.11%
SSE Composite (China)	3826.84	0.38%	-1.26%	5.27%
Nikkei (Japan)	43643.81	1.45%	3.45%	4.36%
Kospi (South Korea)	3219.59	0.45%	2.44%	0.30%
HangSeng (Hong Kong)	25633.91	0.85%	0.06%	3.12%
Strait Times (Singapore)	4308.52	0.03%	0.76%	1.62%
Ibovespa Sao Paulo (Brazil)	141791.58	-0.59%	0.36%	4.33%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8849.60	-0.24%	-0.87%	0.48%
Jakarta Composite (Indonesia)	7766.85	-1.28%	0.40%	3.10%
KLSE (Malaysia)	1585.59	0.47%	0.66%	1.84%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	8-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	107,595	1.54%	3.49%	6.88%
Gold (\$/oz)	3,635.36	1.37%	4.59%	6.97%
Silver (INR/1 kg)	124,300	0.86%	1.21%	8.33%
Silver (\$/oz)	41.33	0.85%	1.60%	7.84%
Brent Crude(\$/bbl)	65.10	1.72%	-3.81%	-4.94%
Crude Oil (INR/1 bbl)	5,465.00	-2.36%	-2.81%	-2.45%
NYMEX Crude(\$/bbl)	62.45	0.61%	-2.74%	-3.69%
Natural Gas (INR/1 mmbtu)	269.20	-0.66%	2.24%	0.07%
Aluminium (INR/1 kg)	256.40	0.20%	-0.25%	0.55%
Copper (INR/1 kg)	907.60	0.22%	0.54%	2.32%
Nickel (INR/1 kg)	1,353.80	0.28%	-1.12%	0.84%
Lead (INR/1 kg)	182.30	-1.38%	-1.46%	-0.79%
Zinc (INR/1 kg)	277.95	0.09%	0.62%	2.43%
Mentha Oil (INR/1 kg)	1,042.90	2.35%	2.41%	2.81%
Baltic Dry Index	2,019	2.02%	-0.25%	-1.56%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Relative Valuation Multiples (P/E, EV/EBITDA, P/B)

Definition: Relative valuation uses financial ratios to compare a company's value against peers or industry benchmarks. Common multiples include Price-to-Earnings (P/E), Enterprise Value to EBITDA (EV/EBITDA), and Price-to-Book (P/B).



Explanation

P/E compares stock price to earnings per share, useful for profitability assessment. EV/EBITDA adjusts for capital structure differences, making it suitable for comparing companies with varying debt levels. P/B compares market price to book value, often used for asset-heavy businesses like banks. Each multiple has limitations—P/E ignores debt, EV/EBITDA excludes capital expenditure needs, and P/B may not reflect intangible assets. For example, Company X with a P/E of 15 and EV/EBITDA of 8 might look cheaper than a peer with P/E of 18 and EV/EBITDA of 10, but differences in growth prospects or risk must also be considered. Analysts often use a combination of these ratios for a balanced view.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.91	11.14	-1.18	13.74
Flexi Cap Fund	2.41	12.97	-1.77	15.32
Mid Cap Fund	2.37	16.29	-1.66	19.73
Large & Mid Cap Fund	2.08	13.62	-1.37	17.17
Small Cap Fund	2.30	15.27	-4.77	19.02
Multi Cap Fund	2.42	13.72	-1.55	18.04
Focused Fund	2.00	11.94	-2.08	14.97
Value Fund	1.48	10.48	-4.67	18.30
Contra Fund	1.82	11.74	-2.54	19.44
ELSS	1.89	12.77	-2.32	15.90
Equity Savings	0.85	6.13	4.52	9.56
Arbitrage Fund	0.34	3.01	6.27	6.76
Dividend Yield Fund	1.68	9.62	-5.31	18.34
Aggressive Hybrid Fund	1.48	10.46	0.60	13.69
Balanced Advantage	1.18	7.91	0.92	11.16
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.				