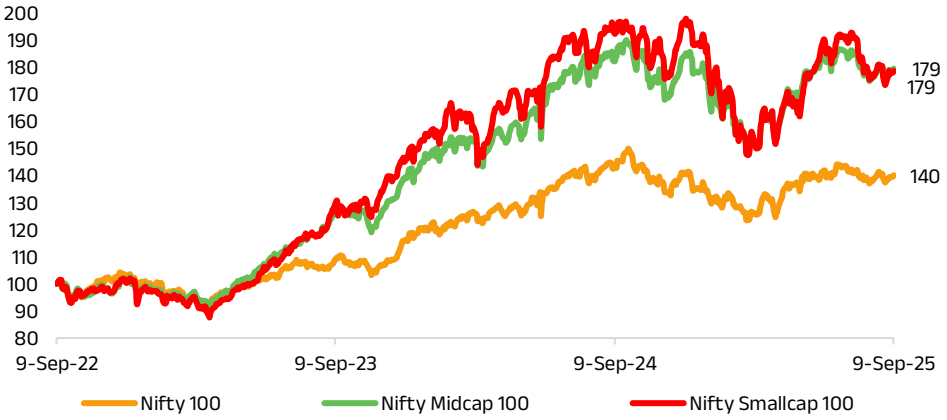


Broad Indices Historical Movement



Source: NSE

Broad Indices

	9-Sep-25	1 Day	1 Week	1 Month
Nifty 50	24,868.60	0.39%	1.18%	2.07%
Nifty 100	25,489.20	0.34%	1.09%	2.23%
Nifty 200	13,865.75	0.32%	1.05%	2.29%
Nifty 500	22,949.10	0.31%	0.99%	2.25%
Nifty Large Midcap 250	16,104.95	0.27%	0.89%	2.19%
Nifty Midcap 150	21,295.90	0.20%	0.69%	2.15%
Nifty Next 50	67,460.75	0.14%	0.66%	2.97%
Nifty Smallcap 250	16,979.75	0.26%	0.84%	2.65%

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

Smart Beta Index

Index	9-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,290.85	0.27%	0.91%	1.98%
NIFTY 500 Value 50	13,976.90	-0.21%	0.78%	2.29%
Nifty 200 Quality 30	20,822.50	0.59%	0.17%	3.72%
Nifty 50 Equal Weight	31,862.10	0.40%	1.16%	4.08%
NIFTY Alpha Low Volatility 30	26,534.70	0.64%	0.92%	2.75%
Nifty High Beta 50	3,592.35	-0.05%	1.39%	1.66%
Nifty Low Volatility 50	25,193.90	0.60%	0.33%	3.69%
Nifty Midcap150 Momentum 50	60,441.90	0.23%	0.05%	1.11%
Nifty PSE	9,390.25	-0.19%	-0.90%	-1.46%
Nifty SME Emerge	15,383.69	0.22%	1.95%	3.85%
Nifty 100 ESG	4,952.90	0.57%	1.08%	3.30%

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

Sector Indices

Index	9-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	27,182.50	-0.02%	6.24%	15.80%
Nifty Bank	54,216.10	0.05%	1.03%	-1.43%
Nifty Consumption	12,443.85	0.10%	1.89%	6.84%
Nifty Financial	25,961.95	0.07%	1.52%	-0.78%
Nifty FMCG	56,497.25	0.58%	-0.54%	2.91%
Nifty Healthcare	14,541.15	0.77%	1.39%	2.87%
Nifty IT	35,255.90	2.76%	-1.35%	2.49%
Nifty Media	1,621.25	0.00%	-0.08%	-0.85%
Nifty Metal	9,734.20	0.17%	3.73%	6.42%
Nifty MNC	30,107.60	0.40%	1.11%	7.01%
Nifty Pharma	22,052.65	0.86%	1.53%	3.04%
Nifty Realty	873.95	-0.30%	-1.38%	-0.02%
Nifty Energy	34,249.65	-0.12%	-0.70%	-0.41%

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

Nifty 50 Top 5 Gainers

Company	9-Sep-25	Prev_Day	% Change	1 Week
Infosys	1,504.30	1,432.90	4.98	0.37
Wipro	249.15	242.52	2.73	-0.71
Tech Mahindra	1,498.20	1,460.70	2.57	-0.97
Adani Ports & SEZ	1,380.90	1,348.30	2.42	3.35
HCL Tech	1,427.10	1,403.00	1.72	-2.63

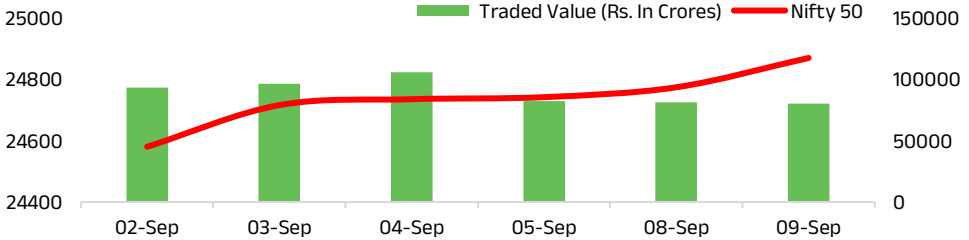
Source: NSE

Nifty 50 Top 5 Losers

Company	9-Sep-25	Prev_Day	% Change	1 Week
Shree Cements Limited	30,190.00	30485	-0.97	0.65
NTPC	324.10	327	-0.80	-3.63
BPCL	313.95	316	-0.79	-0.32
Titan industries limited	3,630.10	3658	-0.76	0.26
Ultratech Cem	12,572.00	12664	-0.73	-1.24

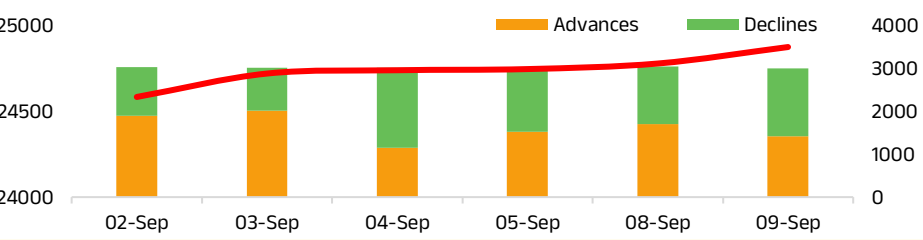
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

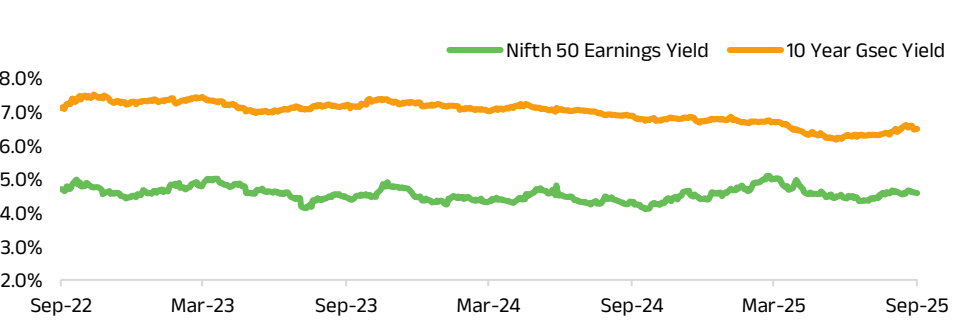
Indian equity markets moved higher, supported by positive global cues and a sharp rebound in domestic information technology stocks. Signs of a weakening U.S. labor market, along with pressure from the U.S. administration, reinforced expectations of a aggressive rate cut at the Federal Reserve's upcoming Sep 2025 meeting.

Vedanta announced that it has invested more than Rs. 12,500 crore (approximately \$1.5 billion) to scale up the production of aluminium, zinc, value-added alloys, copper, steel, nickel, and ferrochrome. This strategic move aims to support the growing demands of India's electric vehicle (EV) industry.

Strides Pharma Science Ltd announced that its Singapore-based subsidiary has entered into a strategic product development partnership with Kenox Pharmaceuticals Inc. The collaboration aims to strengthen the pipeline of nasal spray products across a range of therapeutic areas.

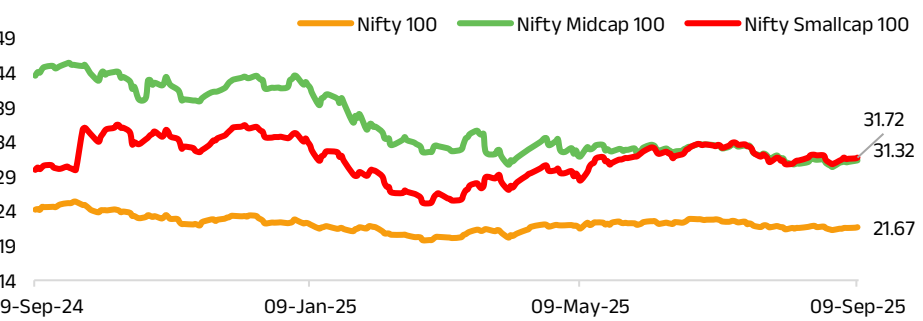
PwC India has launched the Navigate Tax Hub, a generative AI-powered platform designed to transform tax and regulatory functions. As part of the firm's Vision 2030 strategy, the platform combines advanced AI capabilities with PwC's deep tax expertise and secure document management to enhance efficiency, accuracy, and value for tax teams.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



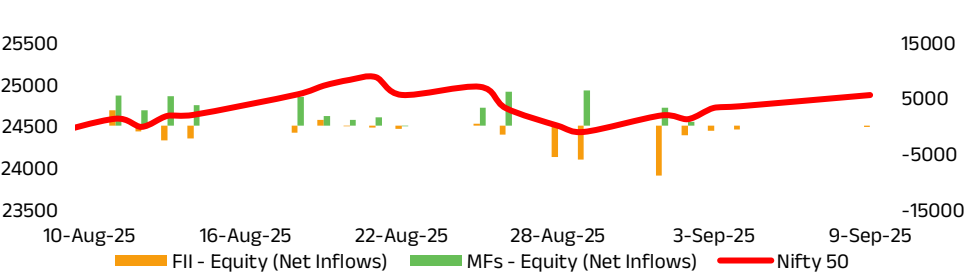
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-176.03	-12,433	-65,167	-143,067
MF**	673.47	3,953	121,506	352,574
DII	83.08	16,541	172,309	520,785

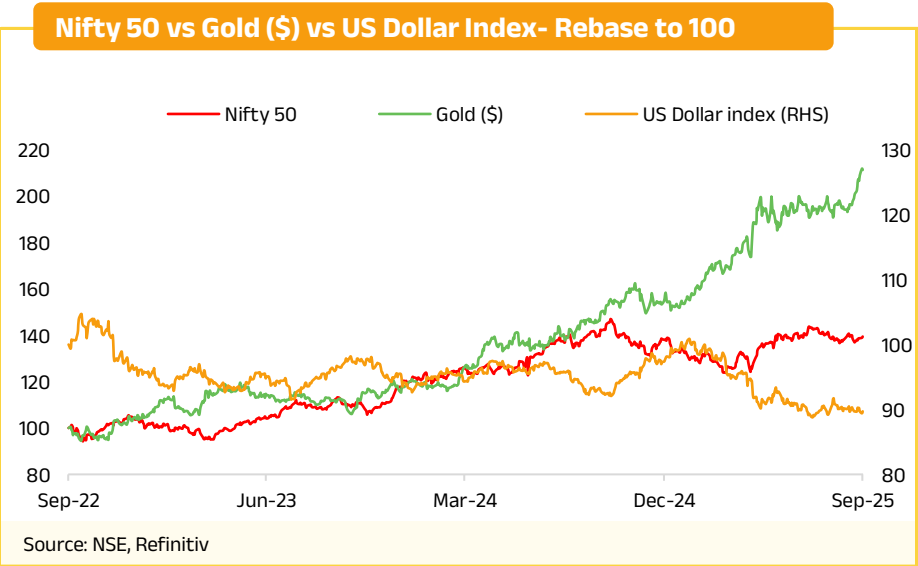
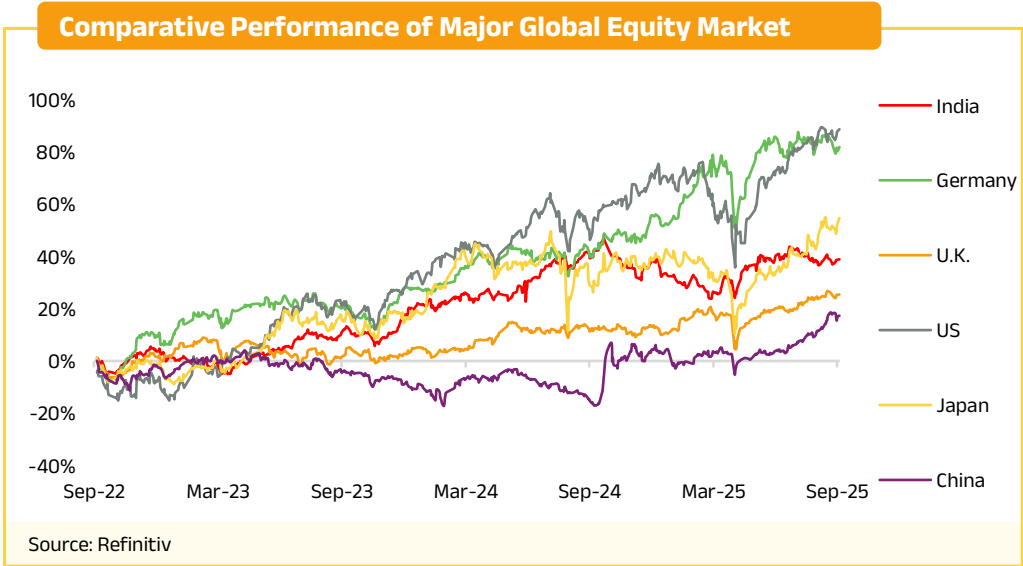
Source: SEBI, NSDL;**As on 2nd Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24950.30	24892.70	0.23%
Near Basis	81.70	119.55	-31.66%
Mid Futures	25065.30	25007.40	0.23%
Mid Basis	196.70	234.25	-16.03%
Near Open Interest (Cr.)	1.69	1.70	-0.25%
Mid Open Interest (Cr.)	0.13	0.13	1.64%
Rollover (%)	8.37	8.11	3.21%
Put Call Ratio (OI)	1.13	0.95	18.75%
Put Call Ratio(Vol)	1.00	0.96	4.08%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2193	2182	42515
Index Options	1537882	1527452	449158
Stock Futures	16119	14857	380635
Stock Options	19580	19141	23250
Total	1575774	1563633	895558
Source: NSE			

Global Equity Market				
Global Indices	9-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3568.41	0.22%	1.55%	2.19%
Nasdaq 100 (U.S.)	23839.80	0.33%	2.62%	0.97%
FTSE (U.K.)	9242.53	0.23%	1.38%	1.61%
DAX Index (Germany)	23718.45	-0.37%	0.98%	-1.84%
CAC 40 Index (France)	7749.39	0.19%	1.24%	0.08%
SSE Composite (China)	3807.29	-0.51%	-1.32%	4.74%
Nikkei (Japan)	43459.29	-0.42%	2.72%	3.92%
Kospi (South Korea)	3260.05	1.26%	2.76%	1.56%
HangSeng (Hong Kong)	25938.13	1.19%	1.73%	4.34%
Strait Times (Singapore)	4297.57	-0.25%	-0.02%	1.36%
Ibovespa Sao Paulo (Brazil)	141618.29	-0.12%	0.91%	4.20%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8803.50	-0.52%	-1.09%	-0.04%
Jakarta Composite (Indonesia)	7628.60	-1.78%	-2.22%	1.26%
KLSE (Malaysia)	1586.81	0.08%	0.64%	1.92%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	9-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	109,013	1.32%	4.83%	8.29%
Gold (\$/oz)	3,626.14	-0.25%	2.64%	6.70%
Silver (INR/1 kg)	124,650	0.28%	1.55%	8.63%
Silver (\$/oz)	40.88	-1.09%	-0.02%	6.67%
Brent Crude(\$/bbl)	65.80	1.08%	-2.86%	-3.91%
Crude Oil (INR/1 bbl)	5,499.00	0.62%	-2.21%	-1.84%
NYMEX Crude(\$/bbl)	62.82	0.59%	-4.53%	-3.12%
Natural Gas (INR/1 mmbtu)	272.90	1.37%	3.65%	1.45%
Aluminium (INR/1 kg)	256.65	0.10%	0.39%	0.65%
Copper (INR/1 kg)	908.50	0.10%	0.12%	2.42%
Nickel (INR/1 kg)	1,345.70	-0.60%	-0.61%	0.24%
Lead (INR/1 kg)	184.50	1.21%	-0.73%	0.41%
Zinc (INR/1 kg)	276.50	-0.52%	0.00%	1.90%
Mentha Oil (INR/1 kg)	1,031.00	-1.14%	1.20%	1.64%
Baltic Dry Index	2,079	2.97%	4.68%	1.37%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



DCF Basics

Definition: Discounted Cash Flow (DCF) is a valuation method that estimates the present value of a company based on its expected future cash flows, discounted at an appropriate rate.



Explanation

DCF assumes that the value of a business equals the sum of its future free cash flows, adjusted for the time value of money. The discount rate reflects the risk of those cash flows, often using the Weighted Average Cost of Capital (WACC). For example, if Company X expects ₹10 crore annually for 5 years and the discount rate is 10%, each year's cash flow is discounted back to today's value. Adding these gives the intrinsic value. While powerful, DCF is sensitive to assumptions about growth and discount rates, so small changes can significantly alter the valuation.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.22	11.49	-1.13	13.80
Flexi Cap Fund	2.68	13.25	-1.53	15.32
Mid Cap Fund	2.60	16.54	-1.15	19.65
Large & Mid Cap Fund	2.31	13.88	-1.12	17.13
Small Cap Fund	2.59	15.58	-3.97	19.04
Multi Cap Fund	2.68	14.00	-1.08	18.05
Focused Fund	2.30	12.27	-1.90	14.99
Value Fund	1.81	10.84	-4.21	18.31
Contra Fund	2.08	12.02	-2.16	19.44
ELSS	2.24	13.16	-1.87	15.96
Equity Savings	0.97	6.25	4.64	9.58
Arbitrage Fund	0.38	3.05	6.37	6.77
Dividend Yield Fund	1.91	9.87	-4.87	18.23
Aggressive Hybrid Fund	1.70	10.70	0.76	13.70
Balanced Advantage	1.37	8.12	1.10	11.20
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.				