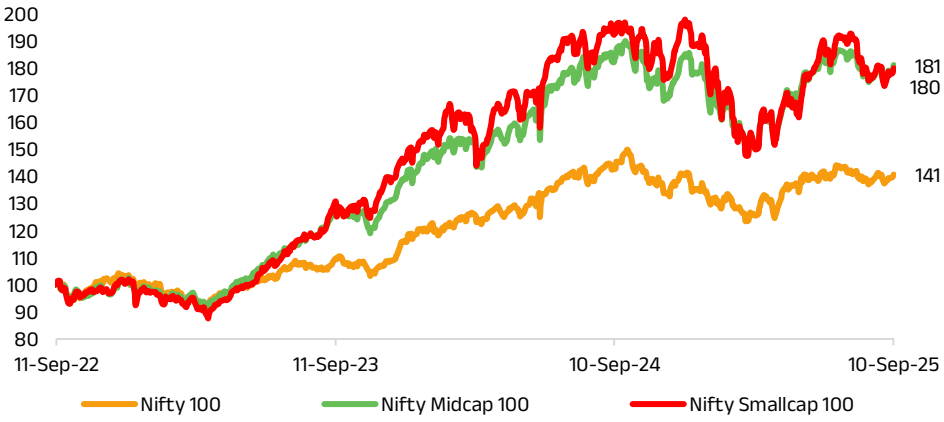


Broad Indices Historical Movement



Source: NSE

Broad Indices

	10-Sep-25	1 Day	1 Week	1 Month
Nifty 50	24,973.10	0.42%	1.04%	2.50%
Nifty 100	25,596.95	0.42%	0.94%	2.66%
Nifty 200	13,936.30	0.51%	0.97%	2.81%
Nifty 500	23,074.15	0.54%	0.92%	2.81%
Nifty Large Midcap 250	16,215.50	0.69%	0.95%	2.89%
Nifty Midcap 150	21,498.35	0.95%	0.97%	3.12%
Nifty Next 50	67,753.80	0.43%	0.43%	3.42%
Nifty Smallcap 250	17,092.25	0.66%	0.67%	3.33%

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

Smart Beta Index

Index	10-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,564.65	0.90%	1.29%	2.90%
NIFTY 500 Value 50	14,043.10	0.47%	0.06%	2.78%
Nifty 200 Quality 30	21,100.60	1.34%	1.34%	5.11%
Nifty 50 Equal Weight	32,018.90	0.49%	0.99%	4.59%
NIFTY Alpha Low Volatility 30	26,687.00	0.57%	1.15%	3.34%
Nifty High Beta 50	3,633.15	1.14%	1.62%	2.81%
Nifty Low Volatility 50	25,284.70	0.36%	0.43%	4.06%
Nifty Midcap150 Momentum 50	61,029.70	0.97%	0.42%	2.09%
Nifty PSE	9,497.75	1.14%	-0.06%	-0.33%
Nifty SME Emerge	15,405.32	0.14%	1.49%	3.99%
Nifty 100 ESG	4,978.65	0.52%	1.24%	3.84%

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

Sector Indices

Index	10-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	26,833.95	-1.28%	4.11%	14.31%
Nifty Bank	54,536.00	0.59%	0.87%	-0.85%
Nifty Consumption	12,406.60	-0.30%	0.89%	6.52%
Nifty Financial	26,123.75	0.62%	1.52%	-0.17%
Nifty FMCG	56,856.85	0.64%	-0.20%	3.56%
Nifty Healthcare	14,643.25	0.70%	1.01%	3.59%
Nifty IT	36,183.80	2.63%	2.00%	5.19%
Nifty Media	1,610.95	-0.64%	-0.68%	-1.48%
Nifty Metal	9,759.45	0.26%	0.86%	6.69%
Nifty MNC	30,167.50	0.20%	0.93%	7.23%
Nifty Pharma	22,122.05	0.31%	0.74%	3.36%
Nifty Realty	883.80	1.13%	-0.66%	1.10%
Nifty Energy	34,522.10	0.80%	-0.30%	0.38%

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

Nifty 50 Top 5 Gainers

Company	10-Sep-25	Prev_Day	% Change	1 Week
Wipro	255.75	249.15	2.65	2.48
HCL Tech	1,463.90	1,427.10	2.58	-0.15
HDFC Standard Life Insurance C	777.60	761.10	2.17	0.15
TCS	3,110.00	3,049.40	1.99	0.40
Infosys	1,532.60	1,504.30	1.88	3.62

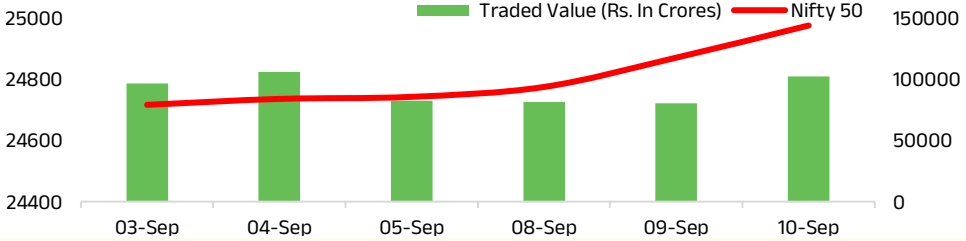
Source: NSE

Nifty 50 Top 5 Losers

Company	10-Sep-25	Prev_Day	% Change	1 Week
M&M	3,604.40	3696	-2.49	9.69
Maruti	15,108.00	15365	-1.67	1.21
Bajaj Auto	9,244.00	9383	-1.48	1.40
Hero Moto	5,350.50	5424	-1.35	0.03
United Phos	696.95	704	-1.00	-2.61

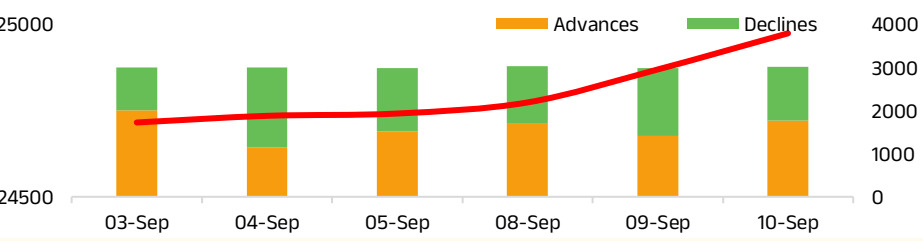
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

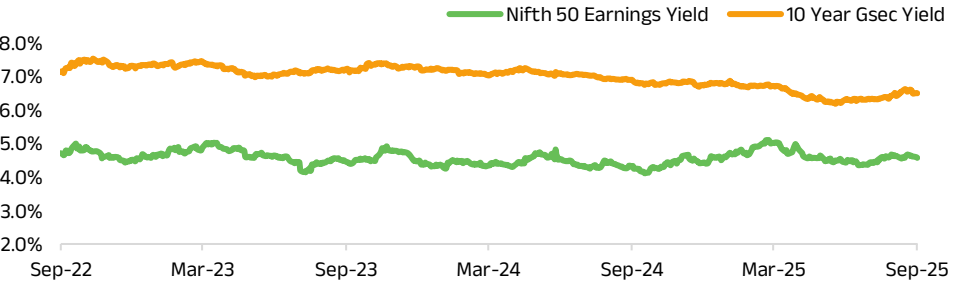
Indian equity markets extended their gains as renewed optimism around ongoing trade negotiations between India and the U.S. lifted investor sentiment. The U.S. President expressed confidence in concluding discussions with Indian Prime Minister, who emphasized the strategic importance of the India-U.S. partnership.

Hindustan Aeronautics Limited (HAL), the Indian National Space Promotion and Authorization Center (IN-SPACE), NewSpace India Limited (NSIL), and ISRO signed a technology transfer agreement on Wednesday for the Small Satellite Launch Vehicle (SSLV). The SSLV is a three-stage launch vehicle designed to place satellites weighing less than 500 kg into Low Earth Orbit (LEO).

PhonePe signed a Memorandum of Understanding (MoU) with SIDBI on Wednesday to provide an end-to-end digital solution through the Udyam Assist Platform (UAP), aimed at empowering micro enterprises and merchants.

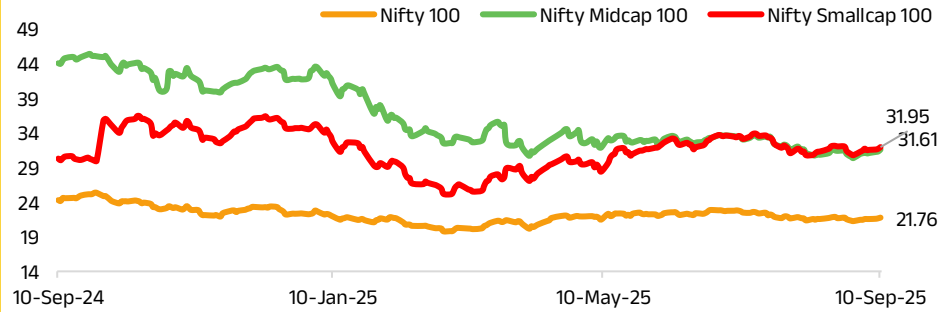
Vedanta is currently in the process of acquiring land for its 3 million tonnes per annum (MTPA) aluminium smelter in Dhenkanal, Odisha.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



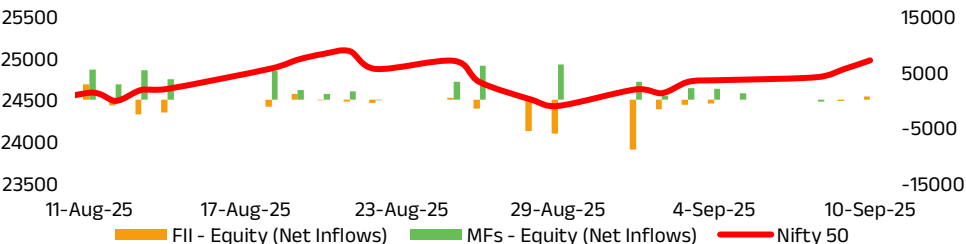
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	570.79	-11,862	-64,596	-142,496
MF**	-304.21	8,839	126,393	357,460
DII	5004.29	21,546	177,313	525,789

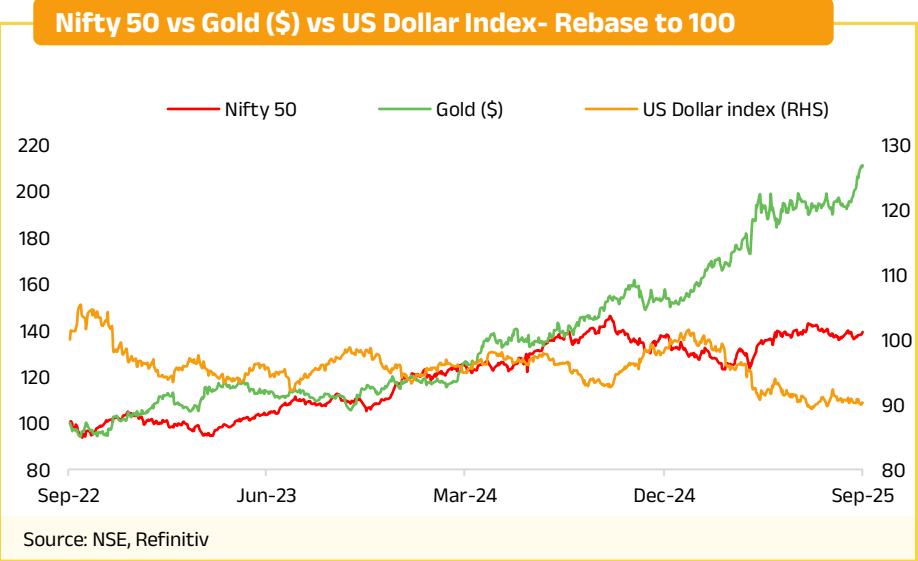
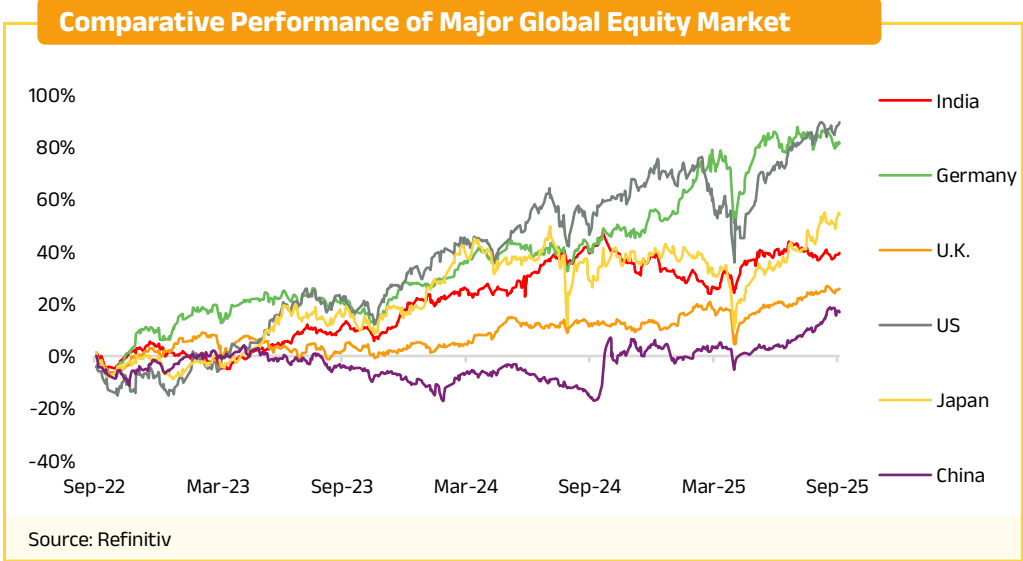
Source: SEBI, NSDL;\*\*As on 8th Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25072.30	24950.30	0.49%
Near Basis	99.20	81.70	21.42%
Mid Futures	25188.60	25065.30	0.49%
Mid Basis	215.50	196.70	9.56%
Near Open Interest (Cr.)	1.72	1.69	1.77%
Mid Open Interest (Cr.)	0.13	0.13	2.34%
Rollover (%)	8.57	8.37	2.34%
Put Call Ratio (OI)	1.15	1.13	1.87%
Put Call Ratio(Vol)	0.87	1.00	-12.60%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	1572	1289	43000
Index Options	2349538	2350785	300156
Stock Futures	12876	13127	381611
Stock Options	17025	16869	23992
Total	2381011	2382070	748759
Source: NSE			

Global Equity Market				
Global Indices	10-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3577.60	0.26%	1.36%	2.45%
Nasdaq 100 (U.S.)	23849.27	0.04%	1.86%	1.01%
FTSE (U.K.)	9225.39	-0.19%	0.52%	1.43%
DAX Index (Germany)	23632.95	-0.36%	0.16%	-2.19%
CAC 40 Index (France)	7761.32	0.15%	0.54%	0.24%
SSE Composite (China)	3812.22	0.13%	-0.04%	4.87%
Nikkei (Japan)	43837.67	0.87%	4.53%	4.82%
Kospi (South Korea)	3314.53	1.67%	4.09%	3.26%
HangSeng (Hong Kong)	26200.26	1.01%	3.38%	5.40%
Strait Times (Singapore)	4346.46	1.14%	1.33%	2.51%
Ibovespa Sao Paulo (Brazil)	142348.70	0.52%	1.78%	4.73%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8830.40	0.31%	1.05%	0.26%
Jakarta Composite (Indonesia)	7699.01	0.92%	-2.37%	2.20%
KLSE (Malaysia)	1590.75	0.25%	0.77%	2.17%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	10-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	109,173	0.15%	3.70%	8.44%
Gold (\$/oz)	3,640.39	0.39%	2.29%	7.12%
Silver (INR/1 kg)	124,412	-0.19%	1.28%	8.42%
Silver (\$/oz)	41.15	0.65%	-0.11%	7.36%
Brent Crude(\$/bbl)	70.16	6.63%	5.65%	2.45%
Crude Oil (INR/1 bbl)	5,520.00	0.38%	-4.40%	-1.46%
NYMEX Crude(\$/bbl)	63.86	1.66%	-0.55%	-1.51%
Natural Gas (INR/1 mmbtu)	274.70	0.66%	3.70%	2.12%
Aluminium (INR/1 kg)	255.85	-0.31%	-0.25%	0.33%
Copper (INR/1 kg)	904.60	-0.43%	-0.33%	1.98%
Nickel (INR/1 kg)	1,341.50	-0.31%	-1.00%	-0.07%
Lead (INR/1 kg)	183.85	-0.35%	-2.05%	0.05%
Zinc (INR/1 kg)	277.50	0.36%	-0.16%	2.27%
Mentha Oil (INR/1 kg)	1,035.30	0.42%	1.14%	2.06%
Baltic Dry Index	2,112	1.59%	8.87%	2.97%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Earnings Quality

Definition: Earnings quality refers to how sustainable and reliable a company's reported profits are, based on the nature of its income and accounting practices.



Explanation

High-quality earnings come from core operations and are backed by cash flows, while low-quality earnings may rely on one-time gains, aggressive accounting, or non-recurring items. For example, Company X reporting a profit boost from selling an asset may look strong in the short term, but this does not reflect ongoing performance. Analysts often check cash flow from operations versus net income to gauge quality. Consistent, cash-backed earnings indicate financial health and reduce the risk of unpleasant surprises for investors.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.62	12.70	-1.18	13.94
Flexi Cap Fund	3.21	15.05	-1.71	15.51
Mid Cap Fund	3.38	19.09	-1.24	19.94
Large & Mid Cap Fund	2.92	15.85	-1.20	17.35
Small Cap Fund	3.20	18.30	-4.59	19.25
Multi Cap Fund	3.26	15.95	-1.37	18.26
Focused Fund	2.91	14.05	-1.96	15.20
Value Fund	2.39	12.62	-4.32	18.52
Contra Fund	2.53	13.48	-2.42	19.60
ELSS	2.81	15.11	-2.06	16.16
Equity Savings	1.12	6.64	4.56	9.62
Arbitrage Fund	0.35	2.90	6.31	6.75
Dividend Yield Fund	2.47	11.43	-4.99	18.42
Aggressive Hybrid Fund	2.09	11.86	0.65	13.83
Balanced Advantage	1.71	8.98	1.13	11.32
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.				

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