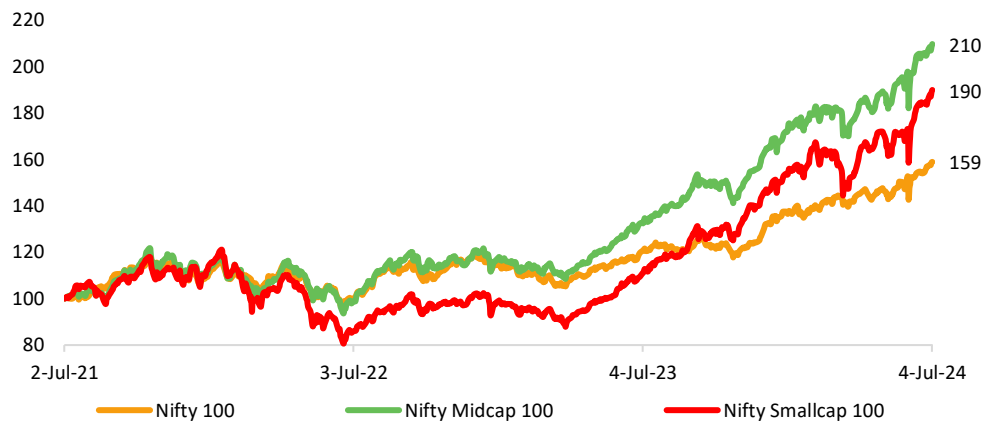


Broad Indices Historical Movement



Source: NSE

Broad Indices

	4-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,302.15	0.06%	1.07%	11.05%
Nifty 100	25,342.55	0.14%	1.26%	11.45%
Nifty 200	13,766.60	0.21%	1.41%	12.03%
Nifty 500	22,914.20	0.28%	1.67%	12.75%
Nifty Large Midcap 250	16,006.95	0.41%	1.82%	13.16%
Nifty Midcap 150	21,215.30	0.68%	2.37%	14.82%
Nifty Next 50	72,928.25	0.47%	2.23%	13.91%
Nifty Smallcap 250	17,591.95	0.56%	3.48%	19.18%

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

Smart Beta Index

Index	4-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,277.95	1.01%	2.99%	12.53%
NIFTY 500 Value 50	14,938.98	0.23%	2.41%	13.81%
Nifty 200 Quality 30	21,120.15	0.49%	2.54%	10.45%
Nifty 50 Equal Weight	30,507.65	0.02%	0.95%	10.11%
NIFTY Alpha Low Volatility 30	28,368.60	0.77%	1.40%	9.63%
Nifty High Beta 50	4,286.38	0.54%	2.76%	16.93%
Nifty Low Volatility 50	23,935.73	0.25%	1.02%	9.43%
Nifty Midcap150 Momentum 50	64,342.95	1.12%	2.97%	13.62%
Nifty PSE	10,941.90	0.49%	3.08%	15.48%
Nifty SME Emerge	15,416.12	1.02%	8.26%	24.86%
Nifty 100 ESG	4,817.55	0.13%	1.35%	11.70%

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

Sector Indices

Index	4-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,366.45	0.73%	0.69%	9.37%
Nifty Bank	53,103.70	0.03%	0.55%	13.16%
Nifty Consumption	11,169.25	0.06%	0.27%	7.02%
Nifty Financial	23,879.70	-0.18%	1.08%	14.70%
Nifty FMCG	57,058.40	-0.21%	0.68%	3.42%
Nifty Healthcare	12,812.85	1.28%	3.00%	9.16%
Nifty IT	37,725.90	1.10%	4.44%	16.74%
Nifty Media	2,044.90	-0.45%	2.44%	13.48%
Nifty Metal	9,936.80	-0.03%	1.73%	10.65%
Nifty MNC	30,754.00	0.30%	1.23%	9.61%
Nifty Pharma	20,192.60	1.39%	3.47%	8.54%
Nifty Realty	1,119.50	0.51%	1.87%	14.69%
Nifty Energy	41,847.70	0.15%	1.22%	11.23%

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

Nifty 50 Top 5 Gainers

Company	4-Jul-24	Prev_Day	% Change	1 Week
HCL Tech	1,522.35	1,481.00	2.79	4.64
ICICI Bank	1,233.00	1,201.60	2.61	1.07
Tata Motors	998.20	975.65	2.31	2.68
Sun Pharma	1,557.90	1,533.95	1.56	2.75
Infosys	1,650.65	1,627.40	1.43	4.91

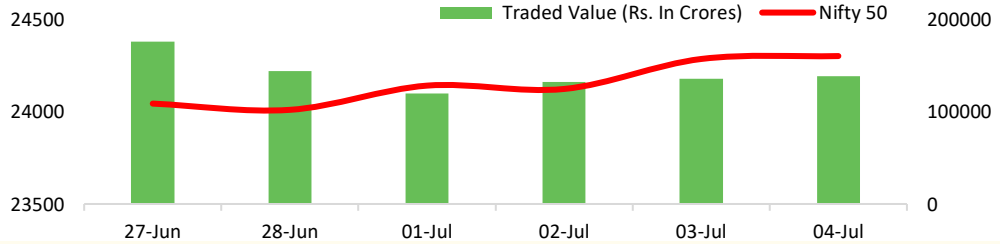
Source: NSE

Nifty 50 Top 5 Losers

Company	4-Jul-24	Prev_Day	% Change	1 Week
HDFC Bank	1,727.15	1769	-2.35	1.83
Bajaj Finance	7,107.05	7259	-2.09	-0.83
Wipro	530.70	539	-1.54	3.90
Tech Mahindra	1,459.15	1480	-1.40	1.88
BPCL	303.00	307	-1.17	-0.61

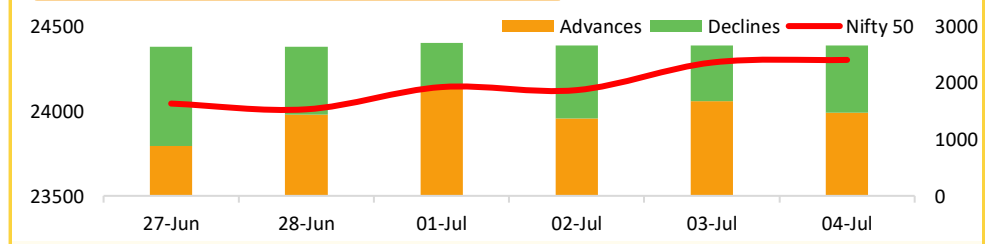
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

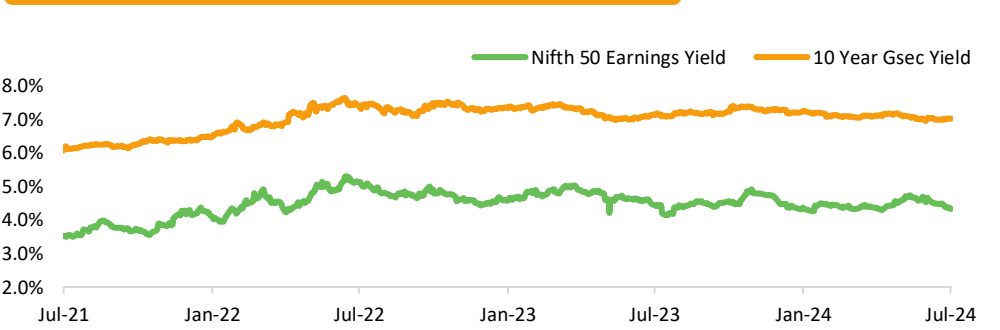
Indian equity markets closed on a flat note as the key benchmark indices gave up the early gains after reaching fresh highs and ended the session with minor gains. Pharmaceutical and information technology sectors benefited from the declining U.S. inflationary pressure, a better outlook for QoQ earnings, and a significant fall in the U.S. Treasury yields.

Bajaj Finance recorded a 10% YoY increase in new loan bookings, totalling 10.97 million in FY24, as compared to 9.94 million during the same period in the previous fiscal year. As of Jun 30, 2024, the company had around Rs 62,750 crore in deposits, showing a 26% YoY increase from the Rs 49,944 crore recorded on Jun 30, 2023.

Vedanta Ltd. revealed increased production of steel, zinc, aluminium and iron ore for the Jun quarter of 2024. However, during the quarter, there was a decline in the production of gas and oil as well as mined metal from abroad.

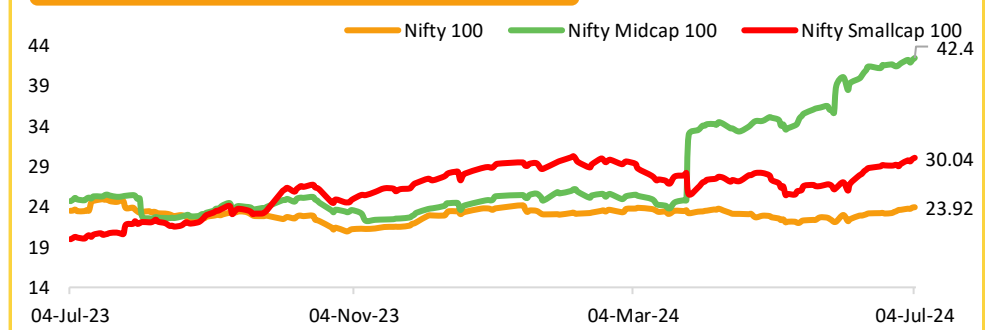
AstraZeneca India (AZIPL), the global capability centre (GCC) of the pharma major AstraZeneca announced that it plans to invest Rs 250 crore to enhance its Global Innovation and Technology Centre (GITC) in Chennai. This will be the company's largest GCC in the world.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



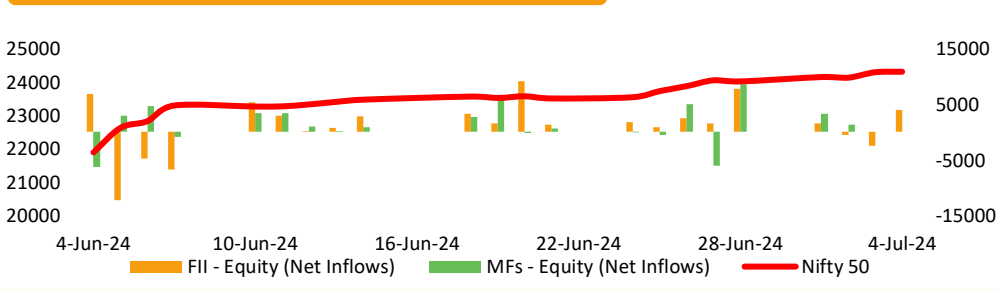
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	3898.51	2,451	2,451	5,651
MF**	1287.19	4,533	4,533	195,959
DII	-2375.18	1,266	1,266	237,393

Source: SEBI, NSDL;**As on 2nd Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24359.50	24350.40	0.04%
Near Basis	57.30	63.90	-10.33%
Mid Futures	24471.00	24462.50	0.03%
Mid Basis	168.85	176.00	-4.06%
Near Open Interest (Cr.)	1.45	1.45	0.43%
Mid Open Interest (Cr.)	0.14	0.14	0.45%
Rollover (%)	9.50	9.33	1.84%
Put Call Ratio (OI)	1.03	1.24	-16.77%
Put Call Ratio (Vol)	1.02	1.01	0.88%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	7045	4558	36654
Index Options	2997924	3001831	307782
Stock Futures	34675	30077	311438
Stock Options	37498	38262	31003
Total	3077142	3074728	686877

Source: NSE

Global Equity Market

Global Indices	4-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.) ^[1]	3013.16	0.49%	0.94%	4.40%
Nasdaq 100 (U.S.) ^[1]	20186.63	0.87%	2.01%	8.21%
FTSE (U.K.)	8241.26	0.86%	0.75%	0.11%
DAX Index (Germany)	18450.48	0.41%	1.32%	0.24%
CAC 40 Index (France)	7695.78	0.83%	2.19%	-3.05%
SSE Composite (China)	2957.57	-0.83%	0.40%	-4.32%
Nikkei (Japan)	40913.65	0.82%	4.00%	5.35%
Kospi (South Korea)	2824.94	1.11%	1.47%	6.12%
HangSeng (Hong Kong)	18028.28	0.28%	1.76%	-2.25%
Strait Times (Singapore)	3439.88	0.71%	2.89%	3.02%
Ibovespa Sao Paulo (Brazil)	126163.98	0.40%	1.49%	3.58%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7831.80	1.19%	0.93%	1.22%
Jakarta Composite (Indonesia)	7220.89	0.34%	3.63%	1.71%
KLSE (Malaysia)	1616.75	0.09%	2.01%	0.08%

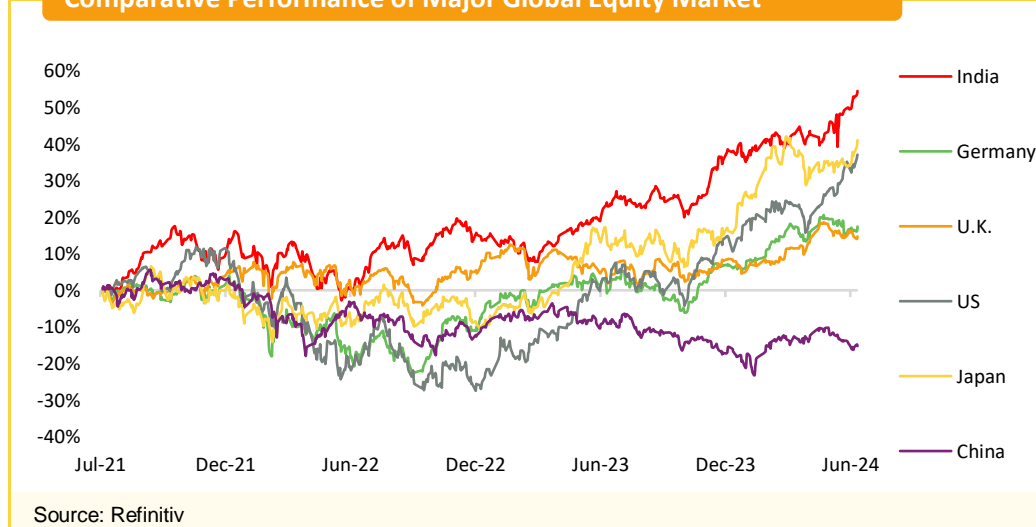
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

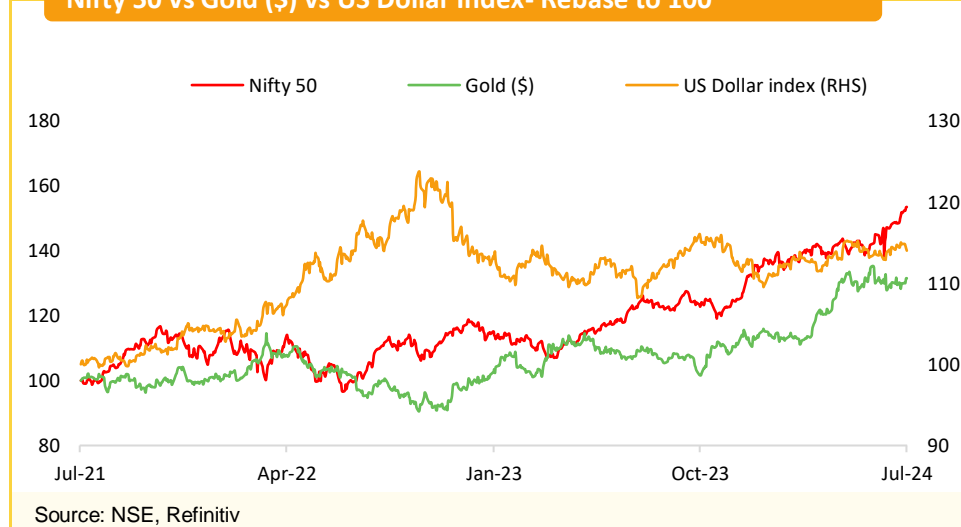
Commodity Prices	4-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	72,169	0.27%	1.50%	0.28%
Gold (\$/oz)	2,356.12	0.00%	1.23%	1.22%
Silver (INR/1 kg)	89,919	0.53%	3.40%	1.03%
Silver (\$/oz)	30.40	-0.23%	4.61%	3.12%
Brent Crude(\$/bbl)	89.79	0.10%	1.48%	17.42%
Crude Oil (INR/1 bbl)	7,007.00	1.32%	3.68%	13.66%
NYMEX Crude(\$/bbl) ^[1]	85.09	1.31%	2.59%	14.72%
Natural Gas (INR/1 mmbtu)	202.00	-0.69%	-11.91%	-11.75%
Aluminium (INR/1 kg)	234.50	0.64%	1.43%	-3.56%
Copper (INR/1 kg)	869.10	2.15%	3.54%	-0.41%
Nickel (INR/1 kg)	1,456.00	-0.64%	0.39%	-10.80%
Lead (INR/1 kg)	197.80	0.41%	0.23%	1.54%
Zinc (INR/1 kg)	280.55	1.85%	4.22%	5.27%
Mentha Oil (INR/1 kg)	964.00	0.43%	3.27%	-1.79%
Baltic Dry Index ^[1]	2,064	-5.28%	1.62%	13.84%

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

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index - Rebase to 100



Term of the Day



Cash flow /fund flow statements, discounted cash flow

Definition: - A Cash Flow Statement refers to the financial statement which states inflow and outflow of cash and cash equivalents during a particular period. Such statement is useful in case of assessing the ability of an enterprise to generate cash or cash equivalent and developing models to assess and compare the present value of future cash flows of different enterprises.



Explanation

Fund Flow Statement, on the other hand, shows the inflow and outflow of funds, that is, sources and applications of funds for a particular period. It is used to analyse the changes in the working capital position of a company. There exists a basic difference between cash flow and fund flow statements. While the former takes into account only transactions involving cash and cash equivalents, the latter is based on accrual system of accounting.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	11.67	17.16	34.98	17.68
Mid Cap Fund	15.65	25.54	56.44	25.59
Large & Mid Cap Fund	13.72	21.55	45.75	22.04
Small Cap Fund	16.94	21.67	52.80	26.92
Multi Cap Fund	14.47	21.52	48.99	23.75
Focused Fund	12.69	18.81	39.29	19.27
Value Fund	13.55	20.95	49.42	23.65
Contra Fund	13.10	21.74	49.45	25.58
ELSS	13.62	19.28	41.82	21.49
Equity Savings	4.24	7.82	16.11	9.71
Arbitrage Fund	0.41	3.87	7.54	5.47
Dividend Yield Fund	12.60	20.82	48.76	24.12
Aggressive Hybrid Fund	10.16	15.89	31.96	16.46
Balanced Advantage	7.29	11.56	25.01	12.87

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.

^[1]Data as on 03 Jul, 2024

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