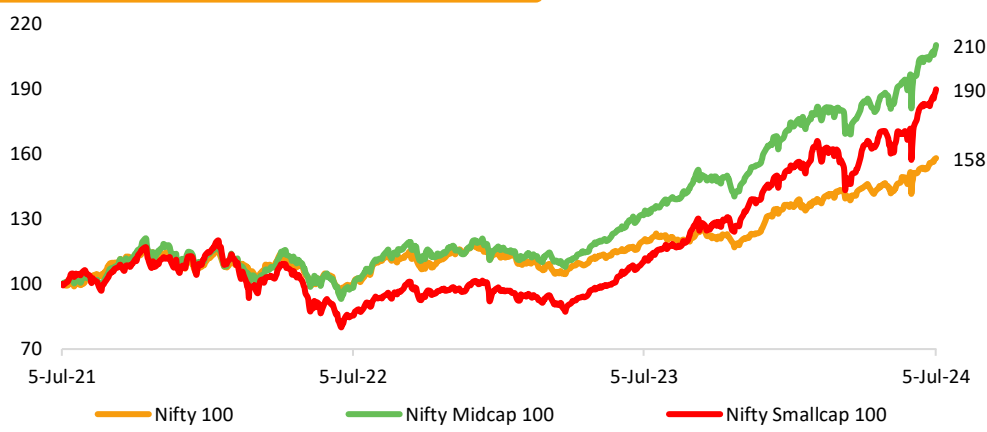


### Broad Indices Historical Movement



Source: NSE

### Broad Indices

	5-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,323.85	0.09%	1.30%	7.53%
Nifty 100	25,391.25	0.19%	1.54%	7.82%
Nifty 200	13,807.25	0.30%	1.68%	8.37%
Nifty 500	22,987.65	0.32%	1.90%	9.18%
Nifty Large Midcap 250	16,074.10	0.42%	2.02%	9.56%
Nifty Midcap 150	21,352.50	0.65%	2.50%	11.27%
Nifty Next 50	73,426.55	0.68%	2.66%	9.86%
Nifty Smallcap 250	17,712.30	0.68%	3.51%	16.15%

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

### Smart Beta Index

Index	5-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,453.80	0.48%	3.27%	8.82%
NIFTY 500 Value 50	15,087.18	0.99%	2.40%	10.50%
Nifty 200 Quality 30	21,278.15	0.75%	2.88%	7.54%
Nifty 50 Equal Weight	30,683.75	0.58%	1.41%	6.88%
NIFTY Alpha Low Volatility 30	28,637.55	0.95%	2.13%	6.81%
Nifty High Beta 50	4,317.39	0.72%	3.17%	11.54%
Nifty Low Volatility 50	24,085.75	0.63%	1.58%	6.20%
Nifty Midcap150 Momentum 50	64,930.10	0.91%	3.46%	10.98%
Nifty PSE	11,095.20	1.40%	3.83%	14.23%
Nifty SME Emerge	15,501.27	0.55%	8.43%	23.08%
Nifty 100 ESG	4,822.90	0.11%	1.60%	7.66%

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

### Sector Indices

Index	5-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,398.30	0.13%	0.78%	4.59%
Nifty Bank	52,660.35	-0.83%	0.61%	7.35%
Nifty Consumption	11,220.45	0.46%	0.80%	2.92%
Nifty Financial	23,641.75	-1.00%	0.95%	9.04%
Nifty FMCG	57,673.00	1.08%	1.61%	0.18%
Nifty Healthcare	12,975.30	1.27%	3.17%	6.68%
Nifty IT	37,720.75	-0.01%	4.32%	14.00%
Nifty Media	2,047.55	0.13%	2.77%	9.30%
Nifty Metal	9,970.50	0.34%	1.59%	4.99%
Nifty MNC	30,940.85	0.61%	1.91%	6.30%
Nifty Pharma	20,453.85	1.29%	3.66%	6.08%
Nifty Realty	1,119.15	-0.03%	1.30%	11.83%
Nifty Energy	42,523.90	1.62%	1.76%	9.85%

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

### Nifty 50 Top 5 Gainers

Company	5-Jul-24	Prev_Day	% Change	1 Week
ONGC	288.20	277.05	4.02	5.11
SBI	859.75	839.30	2.44	1.27
RIL	3,177.25	3,108.05	2.23	1.48
Britannia Industries Limited	5,546.80	5,426.25	2.22	1.30
HUL	2,547.00	2,495.95	2.05	2.99

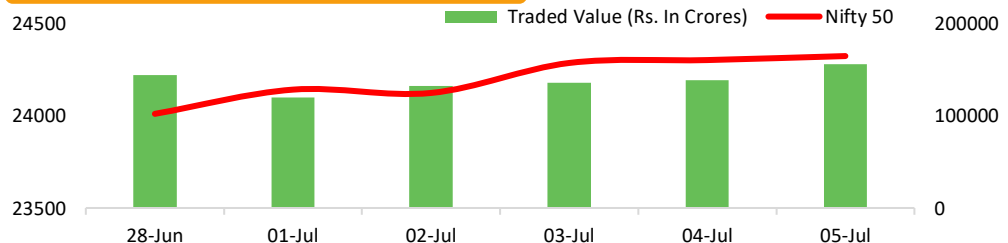
Source: NSE

### Nifty 50 Top 5 Losers

Company	5-Jul-24	Prev_Day	% Change	1 Week
HDFC Bank	1,648.10	1727	-4.58	-2.12
Titan Industries Limited	3,269.35	3336	-2.00	-3.96
M&M	2,880.60	2903	-0.76	0.49
IndusInd Bank	1,434.25	1443	-0.60	-2.07
Ultratech Cem	11,690.15	11760	-0.59	0.19

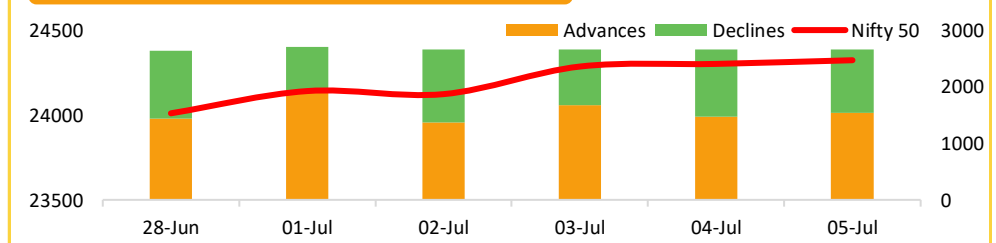
Source: NSE

### Nifty 50 vs NSE Trading Volume



Source: NSE

### Nifty 50 vs Advances & Declines



Source: NSE

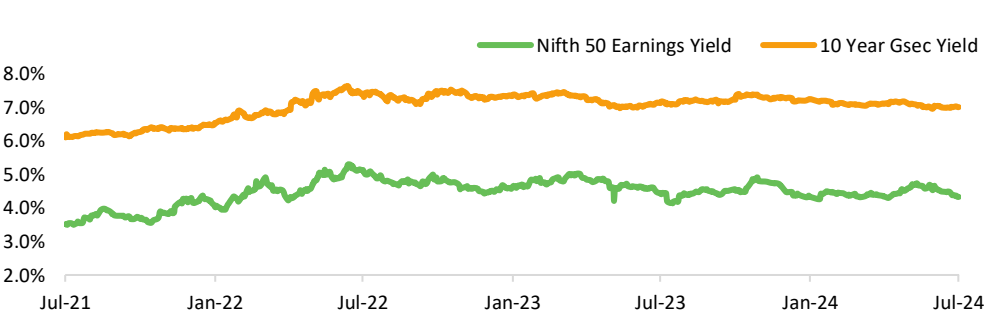
Indian equity markets closed on a flat note ahead of release of the U.S. non-farm payroll data of Jun 2024. The key benchmark indices were mostly rangebound and traded in red for almost the entire session after index heavyweight largest private sector bank showed growth in deposits and advances declined in the first quarter of FY25.

Kalyan Jewellers reported a 27% YoY increase in consolidated revenue for Q1FY25, primarily because of robust performance in the Middle Eastern and Indian markets. For Q1FY25, the company reported consolidated net revenue of Rs. 4,376 crores.

Titan, a prominent jewelry and watch manufacturer, reported a 9% increase in revenue for the first quarter ending Jun 30, 2024. The company, managed by the Tata Group, expanded its retail network by opening 61 new stores during the Apr-Jun period of the financial year 2025, bringing its total store count to 3,096.

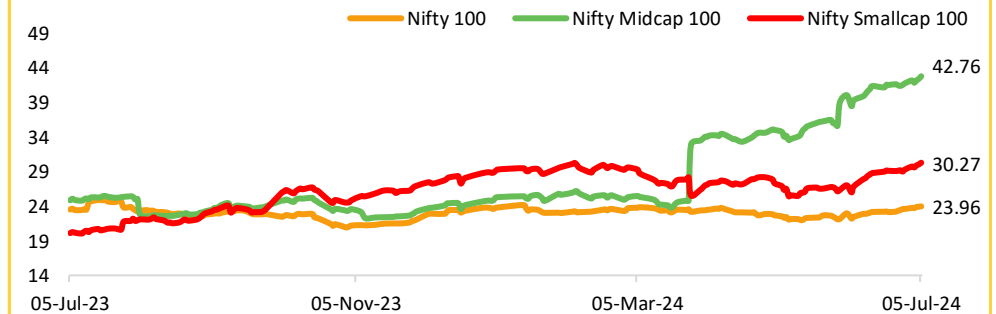
JSW Energy, a private power producer, plans to speed up its Rs 1.15 trillion capital expenditure by a few years, driven by the increasing power demand in India.

### Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



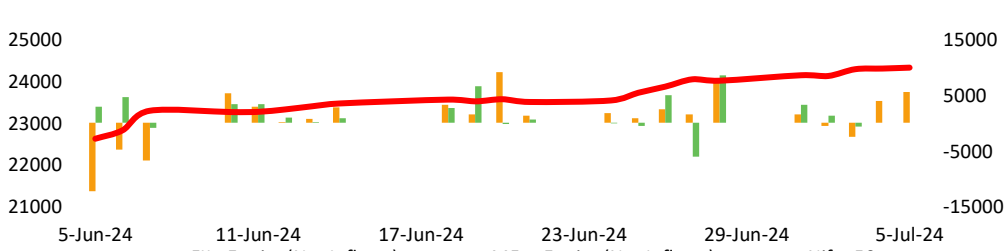
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

### 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	5511.54	7,962	7,962	11,163
MF**	-710.95	3,822	3,822	195,248
DII	-1651.36	-385	-385	235,742

Source: SEBI, NSDL;\*\*As on 3rd Jul 2024;

### F&O Trends

	Latest	Previous	Change %
Near Futures	24379.40	24359.50	0.08%
Near Basis	55.55	57.30	-3.05%
Mid Futures	24497.30	24471.00	0.11%
Mid Basis	173.40	168.85	2.69%
Near Open Interest (Cr.)	1.42	1.45	-2.55%
Mid Open Interest (Cr.)	0.14	0.14	2.03%
Rollover (%)	9.93	9.50	4.59%
Put Call Ratio (OI)	1.20	1.03	15.95%
Put Call Ratio(Vol)	0.84	1.02	-17.94%

Source: NSE

### FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3582	2684	37869
Index Options	2372042	2392870	270517
Stock Futures	24432	25922	311538
Stock Options	39211	39299	34086
Total	2439267	2460774	654010

Source: NSE

### Global Equity Market

Global Indices	5-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3027.86	0.49%	1.79%	3.68%
Nasdaq 100 (U.S.)	20391.97	1.02%	3.60%	7.13%
FTSE (U.K.)	8203.93	-0.45%	0.49%	-0.52%
DAX Index (Germany)	18475.45	0.14%	1.32%	-0.54%
CAC 40 Index (France)	7675.62	-0.26%	2.62%	-4.13%
SSE Composite (China)	2949.93	-0.26%	-0.59%	-3.77%
Nikkei (Japan)	40912.37	0.00%	3.36%	6.29%
Kospi (South Korea)	2862.23	1.32%	2.30%	6.42%
HangSeng (Hong Kong)	17799.61	-1.27%	0.46%	-3.39%
Strait Times (Singapore)	3410.81	-0.85%	2.34%	2.43%
Ibovespa Sao Paulo (Brazil)	126267.05	0.08%	1.91%	4.00%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7822.30	-0.12%	0.71%	0.69%
Jakarta Composite (Indonesia)	7253.37	0.45%	2.69%	4.40%
KLSE (Malaysia)	1611.02	-0.35%	1.32%	0.15%

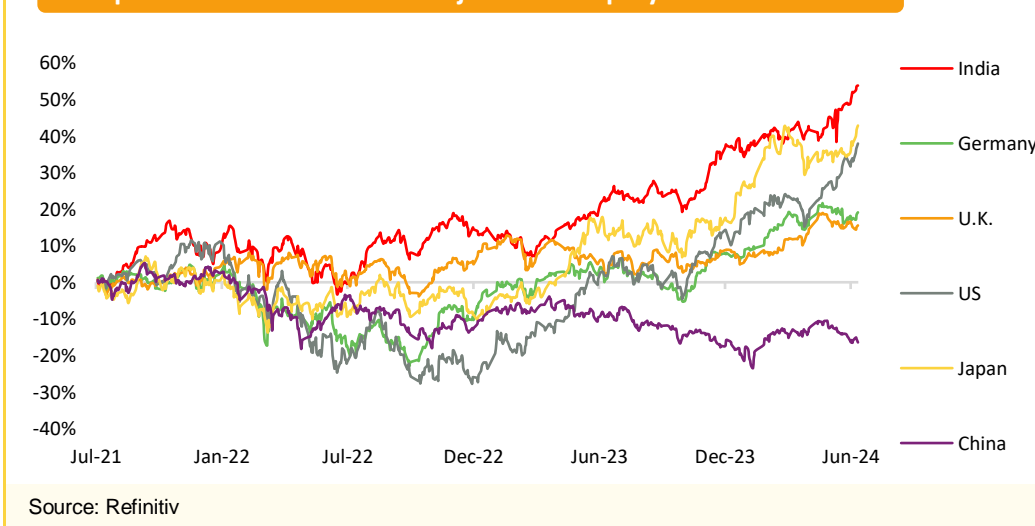
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

### Global & Domestic Commodity Market

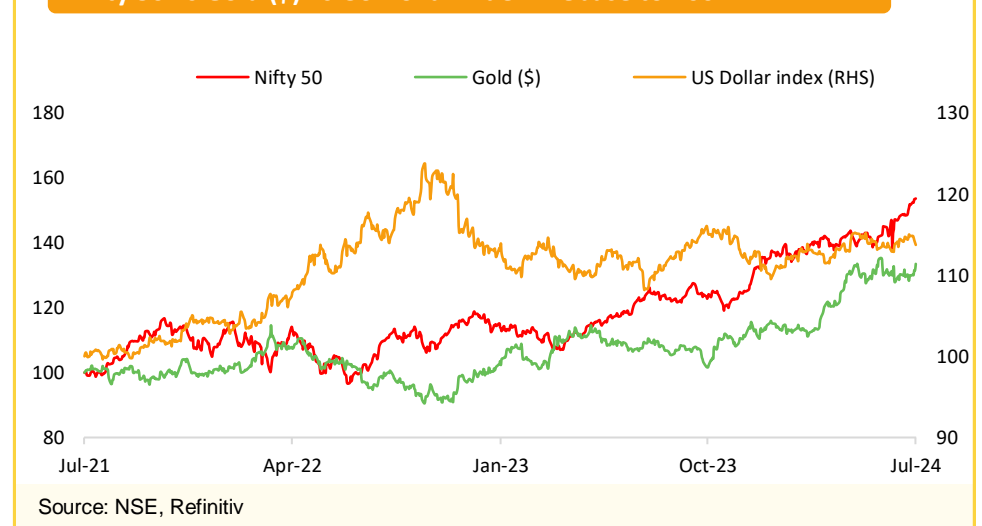
Commodity Prices	5-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	72,348	0.25%	1.10%	0.91%
Gold (\$/oz)	2,391.46	1.50%	2.83%	1.56%
Silver (INR/1 kg)	90,579	0.73%	3.12%	2.60%
Silver (\$/oz)	31.21	2.67%	7.16%	4.01%
Brent Crude(\$/bbl)	90.14	0.39%	1.57%	17.75%
Crude Oil (INR/1 bbl)	7,007.00	0.00%	2.68%	14.55%
NYMEX Crude(\$/bbl)	84.34	-0.88%	1.95%	12.48%
Natural Gas (INR/1 mmbtu)	202.00	0.00%	-9.90%	-6.44%
Aluminium (INR/1 kg)	236.30	0.77%	1.53%	-1.75%
Copper (INR/1 kg)	867.90	-0.14%	3.41%	0.74%
Nickel (INR/1 kg)	1,465.40	0.65%	0.08%	-8.90%
Lead (INR/1 kg)	193.25	-2.30%	-1.90%	1.23%
Zinc (INR/1 kg)	280.75	0.07%	3.03%	6.04%
Mentha Oil (INR/1 kg)	985.20	2.20%	5.67%	-0.27%
Baltic Dry Index	1,966	-2.72%	-4.10%	6.16%

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



#### Candlestick Chart

Definition: - A Candlestick chart is a style of bar chart which is used to describe price movement of an asset class over a period of time. It is a combination of line and bar chart, where each bar represents the range in which the asset class has moved over the given time frame.



#### Explanation

The Candlestick charting technique is popular among traders as it represents a short-term outlook. A candlestick chart indicates opening, closing, high and low prices of the asset class under consideration. It also has a body part which indicates the price movement during the trading day. A red/black color body indicates that the closing price was lower than the opening. If the body is green/white, it means the opposite: the closing price was higher than the opening.

### Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	8.24	17.18	35.04	17.53
Mid Cap Fund	11.97	25.44	56.36	25.60
Large & Mid Cap Fund	10.17	21.56	45.85	21.97
Small Cap Fund	14.14	21.55	52.84	26.75
Multi Cap Fund	11.19	21.56	49.08	23.59
Focused Fund	9.23	18.67	39.25	19.08
Value Fund	10.14	21.03	49.34	23.55
Contra Fund	9.59	21.60	49.36	25.47
ELSS	10.26	19.14	41.79	21.30
Equity Savings	3.29	7.78	16.07	9.68
Arbitrage Fund	0.45	3.75	7.54	5.50
Dividend Yield Fund	9.80	21.08	48.72	24.21
Aggressive Hybrid Fund	7.65	15.85	32.02	16.36
Balanced Advantage	5.63	11.57	25.00	12.84

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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