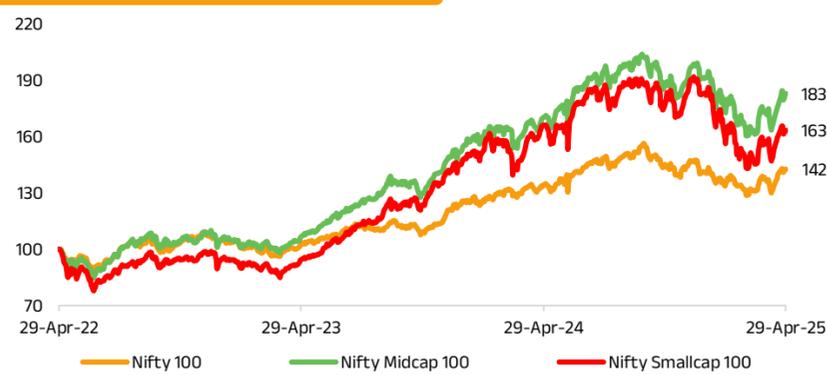


Broad Indices Historical Movement



Source: NSE

Broad Indices

	29-Apr-25	1 Day	1 Week	1 Month
Nifty 50	24,335.95	0.03%	0.70%	3.47%
Nifty 100	24,870.40	-0.01%	0.40%	3.38%
Nifty 200	13,469.00	0.03%	0.40%	3.75%
Nifty 500	22,112.40	0.05%	0.12%	3.62%
Nifty Large Midcap 250	15,416.05	0.10%	0.14%	4.01%
Nifty Midcap 150	20,009.05	0.21%	-0.12%	4.65%
Nifty Next 50	64,892.35	-0.23%	-1.00%	2.93%
Nifty Smallcap 250	15,639.70	0.21%	-1.50%	3.55%

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

Smart Beta Index

Index	29-Apr-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,367.70	0.77%	2.05%	4.26%
NIFTY 500 Value 50	13,552.25	-0.61%	-0.41%	1.87%
Nifty 200 Quality 30	19,885.90	0.32%	1.32%	3.64%
Nifty 50 Equal Weight	30,271.90	-0.14%	0.49%	3.61%
NIFTY Alpha Low Volatility 30	26,212.95	-0.19%	1.11%	4.26%
Nifty High Beta 50	3,476.85	-0.20%	-1.34%	5.02%
Nifty Low Volatility 50	24,563.55	-0.15%	0.67%	4.26%
Nifty Midcap150 Momentum 50	58,113.35	0.25%	0.26%	4.56%
Nifty PSE	9,634.50	-0.16%	-0.70%	3.12%
Nifty SME Emerge	13,841.11	-0.27%	-0.34%	9.28%
Nifty 100 ESG	4,727.35	-0.15%	0.10%	3.18%

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

Sector Indices

Index	29-Apr-25	1 Day	1 Week	1 Month
Nifty Auto	22,299.05	-0.24%	1.80%	4.71%
Nifty Bank	55,391.25	-0.07%	-0.46%	7.42%
Nifty Consumption	11,309.00	-0.13%	-0.91%	5.49%
Nifty Financial	26,193.85	-0.37%	-1.62%	4.46%
Nifty FMCG	56,474.50	-0.26%	-1.26%	5.38%
Nifty Healthcare	13,992.20	-0.88%	0.44%	2.27%
Nifty IT	35,920.40	1.23%	5.83%	-2.62%
Nifty Media	1,547.65	-0.79%	-3.19%	4.91%
Nifty Metal	8,607.15	-0.95%	-0.72%	-5.34%
Nifty MNC	26,910.00	-0.05%	-0.69%	2.55%
Nifty Pharma	21,676.65	-1.06%	1.11%	2.55%
Nifty Realty	869.25	-0.26%	-1.78%	2.11%
Nifty Energy	34,438.75	-0.29%	-0.22%	2.58%

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

Nifty 50 Top 5 Gainers

Company	29-Apr-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,495.30	1,461.50	2.31	8.63
RIL	1,399.70	1,368.80	2.26	8.40
Divi's Lab	6,108.00	6,026.50	1.35	3.32
HCL Tech	1,569.00	1,549.30	1.27	6.02
Tata Beverages	1,168.90	1,155.20	1.19	2.83

Source: NSE

Nifty 50 Top 5 Losers

Company	29-Apr-25	Prev_Day	% Change	1 Week
Coal India	389.10	397	-2.03	-2.38
Ultratech Cem	11,869.00	12114	-2.02	-0.75
ONGC	245.68	251	-1.96	-0.85
Sun Pharma	1,805.50	1842	-1.96	3.32
Power Grid	302.95	309	-1.81	-3.07

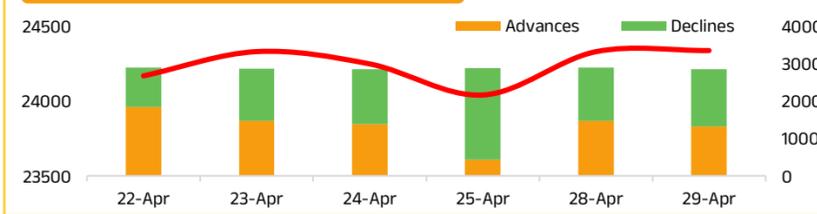
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

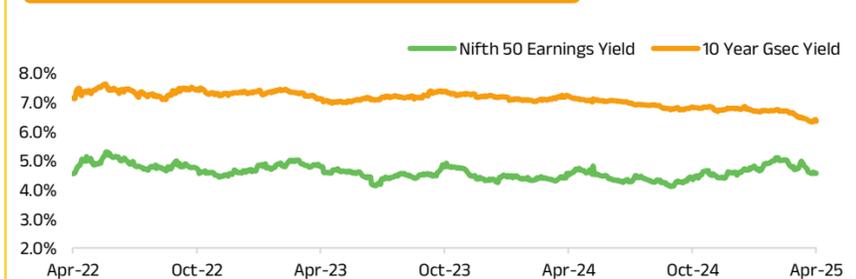
Indian equity markets experienced fluctuations before closing with minimal changes as caution dominated due to geopolitical concerns. The escalating tensions between India and Pakistan raised fears of potential armed conflict. Global market signals were mixed, influenced by worries over tariffs and a possible economic slowdown in the U.S. However, continuous inflows from foreign institutional investors supported market sentiment and limited further pessimism.

Bharat Petroleum Corporation Limited (BPCL) announced an 8% decrease in its consolidated net profit for the quarter ending Mar 2025, amounting to Rs. 4,392 crores compared to Rs. 4,790 crore in the same period last year. The company's revenue for Q4FY25 was Rs. 1,26,916 crores, reflecting a 4% decline from Rs.1,32,087 crore recorded in the corresponding quarter of the previous financial year.

Lifestyle and fashion retailer Trent announced a 55% YoY decline in its consolidated net profit for the fourth quarter ending Mar 2025, amounting to Rs. 318 crore, down from Rs. 704 crore during the corresponding period last year.

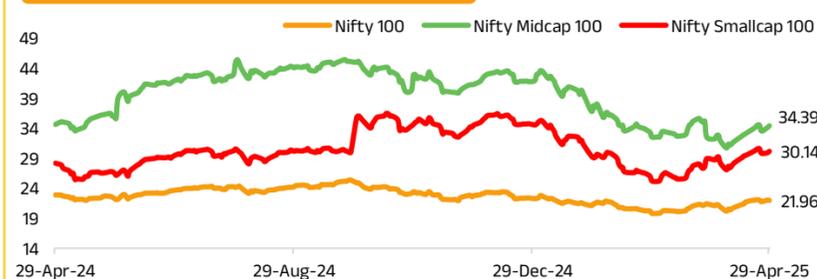
Bajaj Finserv announced a 14% increase in its net profit for Q4FY25, reaching Rs. 2,417 crore compared to Rs. 2,119 crore in the same period last year. The company's revenue for the quarter ending in Mar 2025 was Rs. 36,595 crore, reflecting a 14% YoY growth from Rs. 32,041 crore in the corresponding quarter of the previous financial year.

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	2509.65	1,872	1,872	-114,702
MF**	2816.04	10,620	10,620	122,753
DII	1369.19	26,436	26,436	212,320

Source: SEBI, NSDL;**As on 25th Apr 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24425.30	24452.80	-0.11%
Near Basis	89.35	124.30	-28.12%
Mid Futures	24527.10	24557.80	-0.13%
Mid Basis	191.15	229.30	-16.64%
Near Open Interest (Cr.)	1.31	1.26	3.49%
Mid Open Interest (Cr.)	0.16	0.15	4.40%
Rollover (%)	11.55	11.26	2.62%
Put Call Ratio (OI)	0.94	1.22	-22.54%
Put Call Ratio(Vol)	0.93	0.88	4.96%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4844	2634	25458
Index Options	1386715	1392626	517668
Stock Futures	24029	18784	366491
Stock Options	46349	47348	46144
Total	1461937	1461393	955762

Source: NSE

Global Equity Market

Global Indices	29-Apr-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3042.16	0.59%	5.22%	-0.31%
Nasdaq 100 (U.S.)	19544.94	0.61%	6.94%	1.37%
FTSE (U.K.)	8463.46	0.55%	1.62%	-2.26%
DAX Index (Germany)	22425.83	0.69%	5.32%	-0.16%
CAC 40 Index (France)	7555.87	-0.24%	3.13%	-4.55%
SSE Composite (China)	3286.65	-0.05%	-0.40%	-1.93%
Nikkei (Japan) ^[1]	35839.99	0.38%	4.73%	-3.45%
Kospi (South Korea)	2565.42	0.65%	3.17%	0.29%
HangSeng (Hong Kong)	22008.11	0.16%	2.07%	-6.06%
Strait Times (Singapore)	3805.18	-0.17%	0.26%	-4.21%
Ibovespa Sao Paulo (Brazil)	135092.99	0.06%	3.55%	2.42%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8070.60	0.92%	3.25%	1.11%
Jakarta Composite (Indonesia)	6749.07	0.39%	3.22%	3.66%
KLSE (Malaysia)	1515.56	-0.40%	1.97%	0.13%

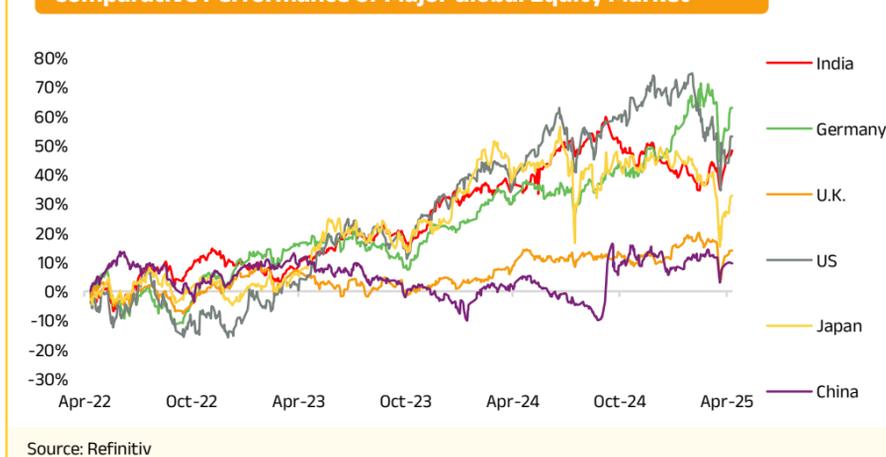
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

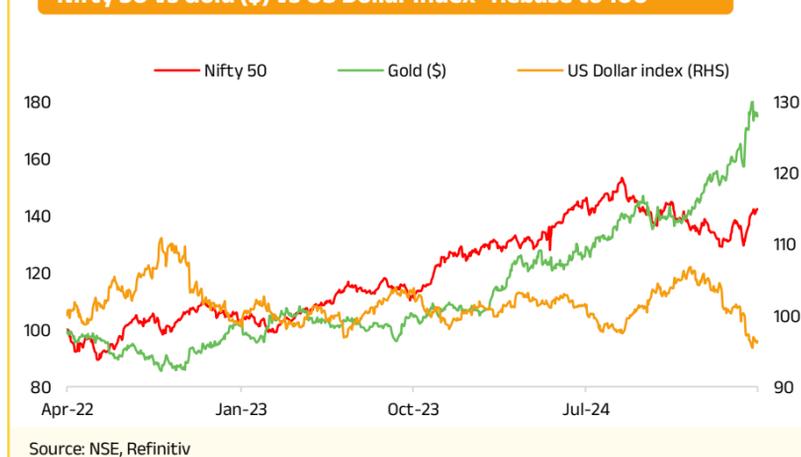
Commodity Prices	29-Apr-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	95,561	1.02%	-2.72%	7.75%
Gold (\$/oz)	3,316.11	-0.76%	-1.93%	7.53%
Silver (INR/1 kg)	97,370	1.42%	1.99%	-3.30%
Silver (\$/oz)	32.97	-0.62%	1.37%	-3.36%
Brent Crude(\$/bbl)	67.03	-0.86%	-3.75%	-10.56%
Crude Oil (INR/1 bbl)	5,287.00	-1.97%	-1.58%	-11.82%
NYMEX Crude(\$/bbl)	61.64	-2.47%	-4.43%	-11.49%
Natural Gas (INR/1 mmbtu)	284.80	13.33%	10.86%	-15.39%
Aluminium (INR/1 kg)	237.00	0.53%	2.40%	-5.58%
Copper (INR/1 kg)	857.15	0.84%	1.40%	-4.58%
Nickel (INR/1 kg)	1,350.50	-0.74%	-1.32%	-4.57%
Lead (INR/1 kg)	183.50	0.55%	0.99%	-1.66%
Zinc (INR/1 kg)	255.00	0.39%	1.31%	-7.05%
Mentha Oil (INR/1 kg)	996.10	0.08%	0.49%	-0.19%
Baltic Dry Index ^[1]	1,403	2.18%	11.26%	-12.42%

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



Value and Growth Fund

Definition: Growth and value are the two most common investment strategies. These two styles of investment have different set of characteristics that make either, or both suitable for investors based on the investment objective of the investor. During different economic conditions, either of these strategies can dominate.



Explanation

A basic principal behind value investing is that markets are inefficient and investors can benefit from this anomaly. In other words, value investing is about finding stocks that the market has not correctly priced. It involves buying a stock on the basis of its fundamentals which include earning growth, cash flow, dividend yield, book value and replacement cost. If the company's fundamentals are strong but the stock's price is below its obvious value, then there arises a value investing opportunity. On the other hand, growth investing targets stocks which have above average earning growth rate, above average sales growth rate and low dividend yield.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.12	-1.97	6.84	14.61
Mid Cap Fund	3.18	-6.13	7.42	19.33
Large & Mid Cap Fund	3.13	-3.89	7.58	17.31
Small Cap Fund	3.00	-8.88	3.08	18.08
Multi Cap Fund	3.01	-4.78	5.93	18.36
Focused Fund	3.08	-4.02	6.54	15.29
Value Fund	3.11	-5.14	4.92	18.82
Contra Fund	3.20	-4.30	7.51	20.51
ELSS	3.51	-4.78	5.51	16.18
Equity Savings	1.69	1.87	7.70	9.46
Arbitrage Fund	0.61	3.49	7.14	6.50
Dividend Yield Fund	2.50	-4.90	5.11	18.50
Aggressive Hybrid Fund	2.83	-1.42	7.72	13.93
Balanced Advantage	2.17	-0.42	6.37	11.55

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 28 Apr, 2025

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