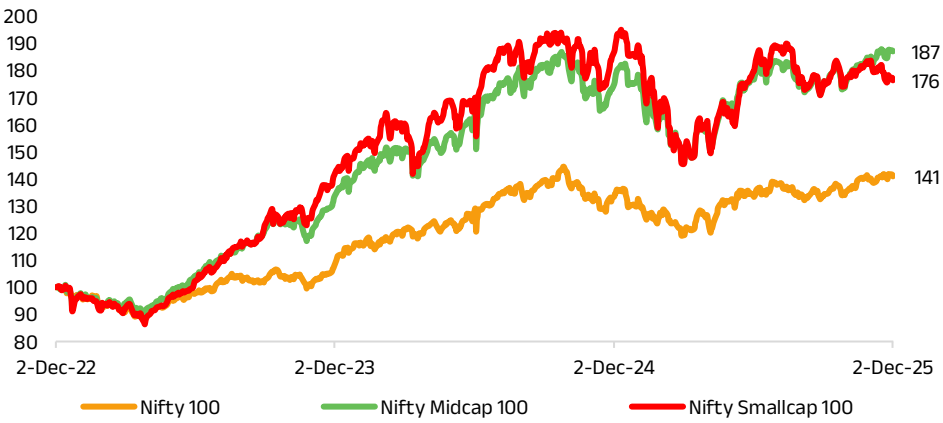


Broad Indices Historical Movement



Source: NSE

Broad Indices

	2-Dec-25	1 Day	1 Week	1 Month
Nifty 50	26,032.20	-0.55%	0.57%	1.21%
Nifty 100	26,592.85	-0.47%	0.71%	0.85%
Nifty 200	14,508.95	-0.43%	0.77%	1.02%
Nifty 500	23,822.25	-0.42%	0.71%	0.47%
Nifty Large Midcap 250	16,843.85	-0.34%	0.79%	1.06%
Nifty Midcap 150	22,327.85	-0.20%	0.86%	1.28%
Nifty Next 50	69,154.45	-0.10%	1.44%	-0.96%
Nifty Smallcap 250	16,696.45	-0.44%	0.38%	-3.57%

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

Smart Beta Index

Index	2-Dec-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,960.65	-0.52%	0.85%	1.65%
NIFTY 500 Value 50	14,992.70	-0.18%	0.95%	-0.96%
Nifty 200 Quality 30	21,371.80	-0.05%	1.22%	1.33%
Nifty 50 Equal Weight	33,106.75	-0.29%	0.62%	0.73%
NIFTY Alpha Low Volatility 30	26,989.35	-0.07%	0.85%	0.73%
Nifty High Beta 50	3,943.00	-0.38%	1.13%	-0.22%
Nifty Low Volatility 50	25,626.80	-0.13%	0.49%	0.93%
Nifty Midcap150 Momentum 50	63,263.20	-0.37%	0.75%	2.19%
Nifty PSE	9,730.05	-0.29%	0.21%	-3.31%
Nifty SME Emerge	15,048.35	-1.31%	-0.38%	-2.86%
Nifty 100 ESG	5,164.95	-0.28%	0.86%	2.01%

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

Sector Indices

Index	2-Dec-25	1 Day	1 Week	1 Month
Nifty Auto	27,979.50	-0.05%	2.19%	4.36%
Nifty Bank	59,273.80	-0.68%	0.77%	2.59%
Nifty Consumption	12,459.95	-0.02%	0.44%	0.36%
Nifty Financial	27,565.25	-0.90%	0.57%	1.57%
Nifty FMCG	55,390.95	-0.20%	0.62%	-1.45%
Nifty Healthcare	14,876.60	-0.06%	0.52%	1.25%
Nifty IT	37,541.25	-0.02%	1.94%	5.12%
Nifty Media	1,458.90	-0.40%	2.38%	-5.16%
Nifty Metal	10,315.85	-0.36%	2.41%	-2.79%
Nifty MNC	30,601.60	0.33%	2.27%	1.31%
Nifty Pharma	22,905.00	0.08%	1.39%	3.29%
Nifty Realty	892.05	-0.21%	-1.03%	-5.86%
Nifty Energy	35,459.40	-0.22%	0.31%	-2.25%

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

Nifty 50 Top 5 Gainers

Company	2-Dec-25	Prev_Day	% Change	1 Week
Asian Paints	2,954.40	2,867.60	3.03	2.73
BPCL	358.75	354.00	1.34	0.82
Britannia Industries Limited	5,875.50	5,813.50	1.07	0.14
Maruti	16,239.00	16,097.00	0.88	2.20
Bharti Airtel	2,104.00	2,089.70	0.68	-2.66

Source: NSE

Nifty 50 Top 5 Losers

Company	2-Dec-25	Prev_Day	% Change	1 Week
Axis Bank	1,258.00	1276	-1.39	-0.66
RIL	1,546.30	1566	-1.26	0.43
ICICI Bank	1,373.00	1390	-1.23	1.12
HDFC Bank	989.80	1002	-1.23	0.00
L&T Ltd.	4,030.50	4073	-1.05	0.85

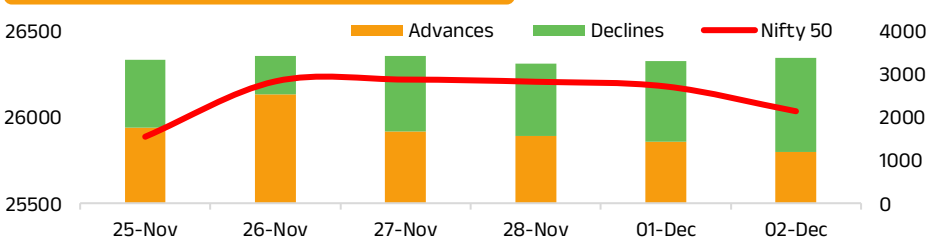
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE



Indian equity markets declined, weighed down by weak industrial production data for Oct 2025, which grew only 0.4% YoY, coupled with rupee weakness and caution ahead of upcoming U.S. Federal Reserve and RBI policy decisions. Global cues provided little support, as U.S. markets closed lower on rising U.S. Treasury yields.



Razorpay, fintech firm announced that it has received the Payment Aggregator-Cross Border (PA-CB) licence from the Reserve Bank of India (RBI). This licence places Razorpay among a select group of fintech companies officially authorized to handle both inward and outward cross-border transactions under full regulatory supervision.

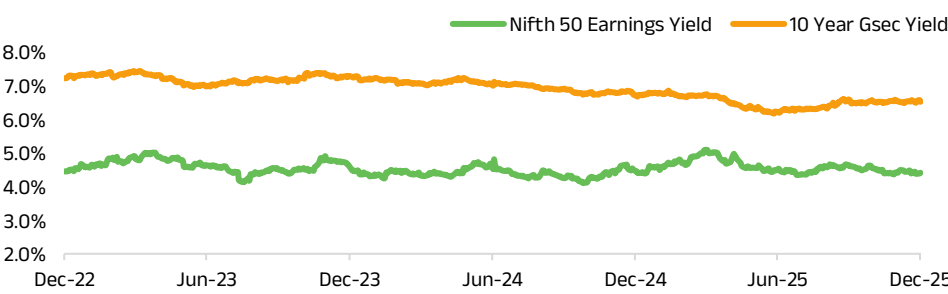


Swiggy Ltd. is preparing to raise up to Rs. 10,000 crore (approximately \$1.1 billion) from institutional investors as early as next week, according to people familiar with the matter.



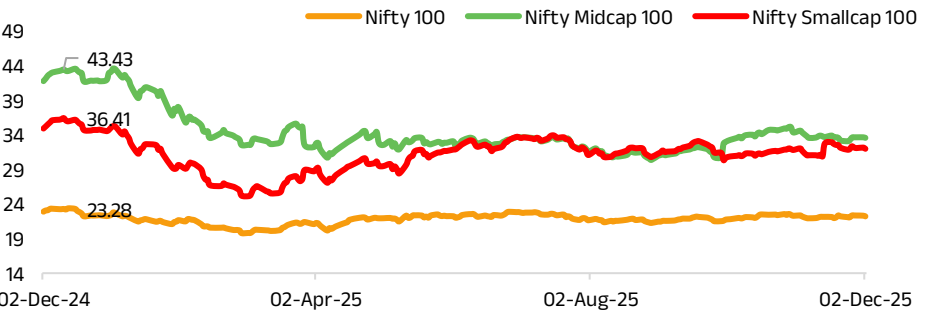
Reliance Industries has completed the merger of Star Television Productions Ltd. (STPL), a subsidiary of the company, with Jiostar. On Nov 14, 2024, Reliance had intimated about the scheme of arrangement for the merger of STPL with Star India, now known as Jiostar India, another subsidiary of the company.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



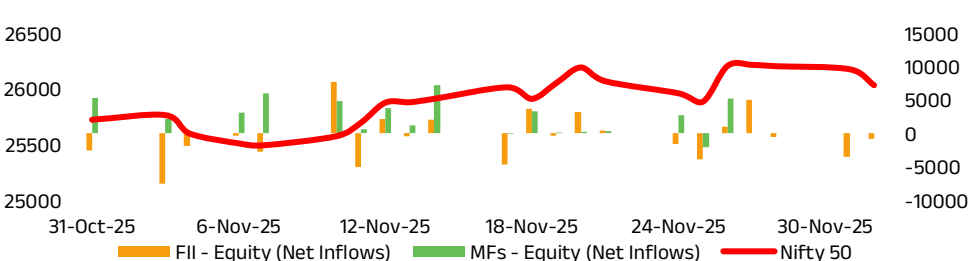
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-846.04	-4,335	6,510	-1,48,008
MF**	5208.87		58,892	4,53,955
DII	4645.94	7,205	1,37,690	7,07,276

Source: SEBI, NSDL;\*\*As on 26th Nov 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	26213.00	26334.70	-0.46%
Near Basis	180.80	158.95	13.75%
Mid Futures	26388.70	26503.10	-0.43%
Mid Basis	356.50	327.35	8.90%
Near Open Interest (Cr.)	1.46	1.41	3.49%
Mid Open Interest (Cr.)	0.10	0.09	7.63%
Rollover (%)	7.74	7.30	6.04%
Put Call Ratio (OI)	0.83	1.14	-27.24%
Put Call Ratio(Vol)	1.09	1.03	5.02%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2430	2334	27736
Index Options	1823282	1822977	494007
Stock Futures	13758	14221	395565
Stock Options	17632	17931	19268
Total	1857103	1857462	936576

Source: NSE

Global Equity Market

Global Indices	2-Dec-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3725.08	0.22%	0.70%	-0.41%
Nasdaq 100 (U.S.)	25555.86	0.84%	1.30%	-1.99%
FTSE (U.K.)	9728.23	0.26%	1.24%	0.11%
DAX Index (Germany)	23751.24	0.69%	1.22%	-0.86%
CAC 40 Index (France)	8121.42	0.30%	1.19%	0.00%
SSE Composite (China)	3897.71	-0.42%	0.72%	-1.44%
Nikkei (Japan)	49303.45	0.00%	1.32%	-5.93%
Kospi (South Korea)	3994.93	1.90%	3.56%	-2.74%
HangSeng (Hong Kong)	26095.05	0.24%	0.77%	0.73%
Strait Times (Singapore)	4537.96	0.26%	1.17%	2.47%
Ibovespa Sao Paulo (Brazil)	161092.25	1.56%	1.73%	6.07%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8579.70	0.17%	0.50%	-3.40%
Jakarta Composite (Indonesia)	8617.04	0.80%	1.12%	5.55%
KLSE (Malaysia)	1630.60	0.37%	1.17%	1.33%

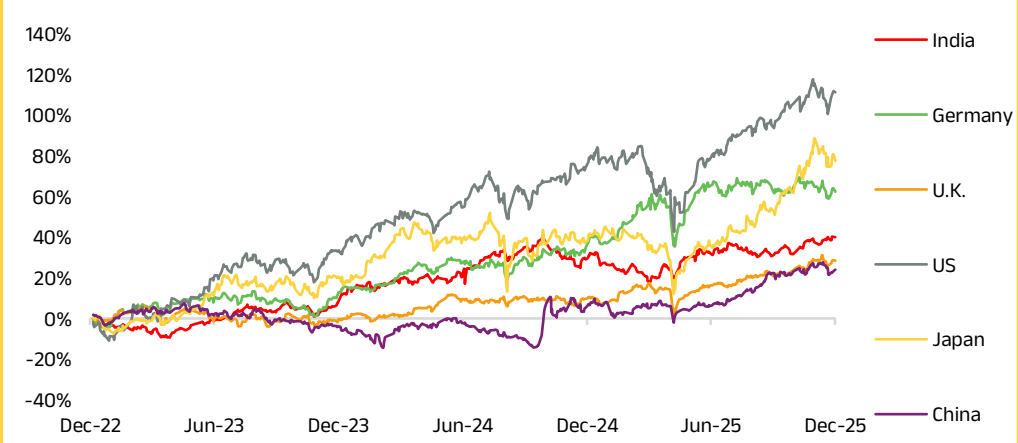
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	2-Dec-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,27,081	-0.81%	1.92%	5.51%
Gold (\$/oz)	4,204.68	-0.66%	1.81%	5.07%
Silver (INR/1 kg)	1,74,202	0.40%	11.71%	17.15%
Silver (\$/oz)	57.36	-1.04%	11.59%	17.91%
Brent Crude(\$/bbl)	64.87	0.06%	0.75%	-1.08%
Crude Oil (INR/1 bbl)	5,324.00	1.64%	1.45%	-0.80%
NYMEX Crude(\$/bbl) <sup>[1]</sup>	59.37	1.52%	2.10%	-3.70%
Natural Gas (INR/1 mmbtu)	441.60	1.77%	8.85%	25.99%
Aluminium (INR/1 kg)	278.40	1.24%	3.65%	2.84%
Copper (INR/1 kg)	1,053.80	1.04%	3.87%	4.49%
Nickel (INR/1 kg)	1,340.80	0.21%	1.09%	-0.17%
Lead (INR/1 kg)	186.15	0.13%	0.24%	1.09%
Zinc (INR/1 kg)	321.00	1.42%	3.00%	4.22%
Mentha Oil (INR/1 kg)	1,011.20	-0.13%	-0.37%	0.71%
Baltic Dry Index <sup>[1]</sup>	2,583	0.90%	11.87%	31.38%

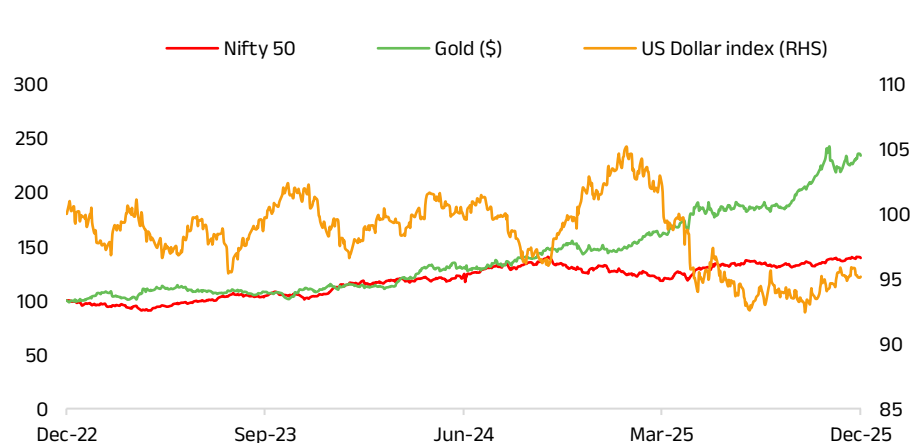
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Source: Refinitiv

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



Source: NSE, Refinitiv

Term of the Day



Hybrid Instrument

Definition: Hybrid instruments combine features of both debt and equity instruments, offering fixed income along with potential for capital appreciation.



Explanation

Convertible bonds and preference shares are examples of hybrid instruments.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.83	5.00	5.00	13.94
Flexi Cap Fund	0.23	4.77	2.37	15.46
Mid Cap Fund	0.19	5.44	2.71	20.52
Large & Mid Cap Fund	0.36	5.02	3.67	17.44
Small Cap Fund	-2.12	1.88	-3.87	18.35
Multi Cap Fund	-0.15	4.39	2.00	17.85
Focused Fund	0.37	4.63	3.13	15.04
Value Fund	0.51	4.62	2.33	17.86
Contra Fund	0.90	5.39	3.24	19.17
ELSS	0.05	4.06	2.35	16.16
Equity Savings	0.55	3.72	6.12	9.69
Arbitrage Fund	0.54	2.78	6.17	6.86
Dividend Yield Fund	0.22	4.51	2.17	18.16
Aggressive Hybrid Fund	0.30	3.95	4.45	13.64
Balanced Advantage	0.52	3.65	4.62	11.42

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.

<sup>[1]</sup> Data as on 01 Dec, 2025

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