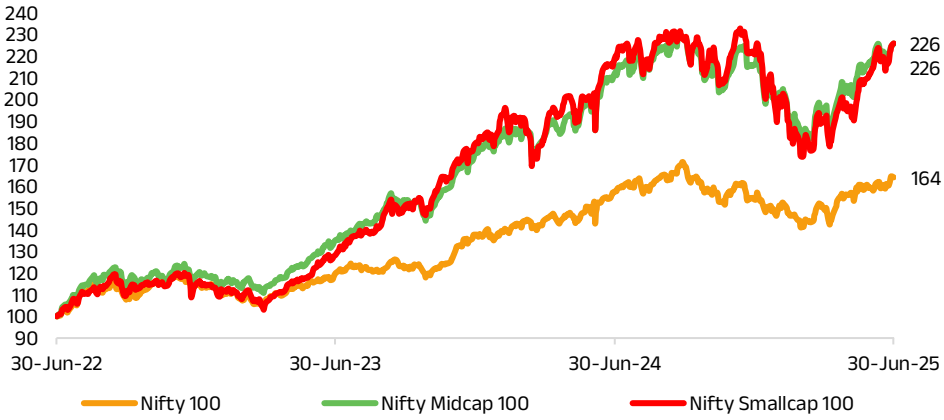


Broad Indices Historical Movement



Source: NSE

Broad Indices

	30-Jun-25	1 Day	1 Week	1 Month
Nifty 50	25,517.05	-0.47%	2.18%	3.10%
Nifty 100	26,139.50	-0.32%	2.38%	3.14%
Nifty 200	14,252.65	-0.16%	2.42%	3.29%
Nifty 500	23,617.20	-0.01%	2.68%	3.58%
Nifty Large Midcap 250	16,572.25	0.18%	2.63%	3.61%
Nifty Midcap 150	21,988.65	0.68%	2.89%	4.09%
Nifty Next 50	68,998.20	0.42%	3.32%	3.35%
Nifty Smallcap 250	17,797.80	0.88%	4.40%	5.73%

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

Smart Beta Index

Index	30-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,901.15	0.15%	1.18%	4.57%
NIFTY 500 Value 50	14,365.40	0.42%	3.47%	3.90%
Nifty 200 Quality 30	21,025.40	0.04%	1.73%	2.40%
Nifty 50 Equal Weight	32,053.75	-0.23%	2.33%	3.71%
NIFTY Alpha Low Volatility 30	27,188.90	-0.23%	2.28%	2.91%
Nifty High Beta 50	3,869.30	0.82%	3.75%	4.07%
Nifty Low Volatility 50	25,380.55	-0.33%	2.15%	2.78%
Nifty Midcap150 Momentum 50	63,979.45	0.69%	2.13%	4.98%
Nifty PSE	10,093.65	0.15%	1.46%	2.29%
Nifty SME Emerge	14,783.58	0.70%	1.80%	3.29%
Nifty 100 ESG	5,014.20	-0.13%	2.60%	3.25%

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

Sector Indices

Index	30-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,872.55	-0.56%	1.75%	2.34%
Nifty Bank	57,312.75	-0.23%	2.24%	2.80%
Nifty Consumption	11,842.85	-0.23%	2.26%	4.04%
Nifty Financial	27,174.45	-0.62%	2.33%	2.55%
Nifty FMCG	54,883.90	-0.41%	1.21%	-0.72%
Nifty Healthcare	14,463.80	0.36%	2.70%	4.13%
Nifty IT	38,950.00	0.33%	1.40%	4.36%
Nifty Media	1,754.45	0.38%	0.35%	2.52%
Nifty Metal	9,534.80	-0.45%	3.66%	3.72%
Nifty MNC	28,937.70	0.27%	3.03%	2.92%
Nifty Pharma	22,038.70	0.50%	1.91%	2.78%
Nifty Realty	986.55	-0.74%	-2.58%	3.92%
Nifty Energy	36,568.65	0.07%	2.70%	1.92%

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

Nifty 50 Top 5 Gainers

Company	30-Jun-25	Prev_Day	% Change	1 Week
United Phos	661.25	644.90	2.54	3.51
Divi's Lab	6,809.50	6,658.00	2.28	2.61
SBI	820.35	805.40	1.86	3.82
IndusInd Bank	872.10	857.70	1.68	3.83
Britannia Industries Limited	5,851.00	5,794.50	0.98	5.05

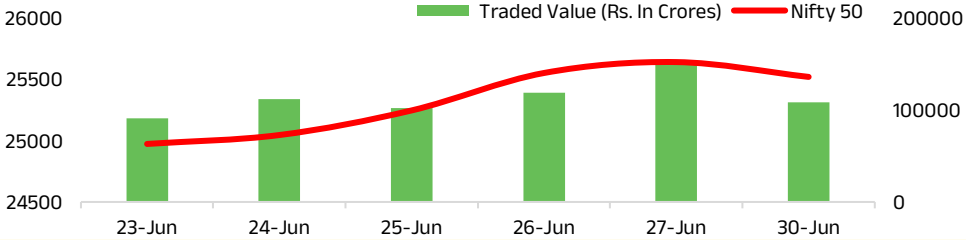
Source: NSE

Nifty 50 Top 5 Losers

Company	30-Jun-25	Prev_Day	% Change	1 Week
Tata Beverages	1,098.90	1124	-2.26	-0.95
Axis Bank	1,199.20	1225	-2.11	-1.23
Kotak Bank	2,163.50	2208	-2.01	-0.94
Hero Moto	4,237.10	4320	-1.93	-0.38
Maruti	12,400.00	12642	-1.91	-2.35

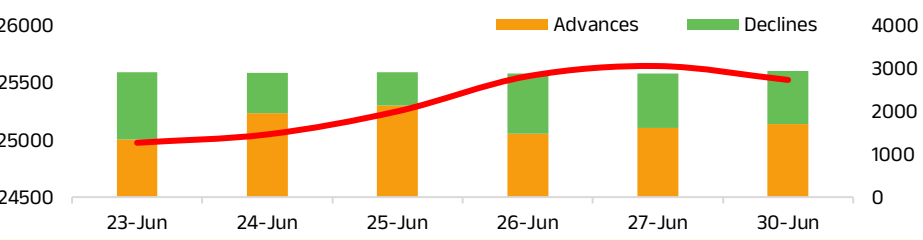
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

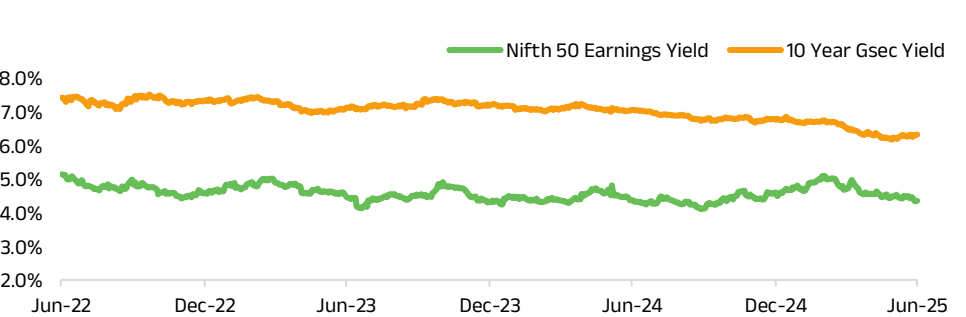
Indian equity markets declined after the U.S. President announced he would not extend the self-imposed Jul 9, 2025, deadline for countries to reach new trade agreements, raising tariff concerns for India amid stalled agricultural negotiations. The market also fell as investors booked profits following recent gains.

AU Small Finance Bank (AU SFB) has formed a partnership with the Life Insurance Corporation of India (LIC), which is the largest life insurer in the nation. This collaboration aligns with the national goal of realizing ‘Insurance for All by 2047’ by improving insurance penetration, particularly in rural and semi-urban areas.

HCLTech has revealed a multi-year strategic alliance with OpenAI, the organization dedicated to AI research and deployment, with the goal of enabling large-scale enterprise AI transformation as one of the first strategic service partners to OpenAI.

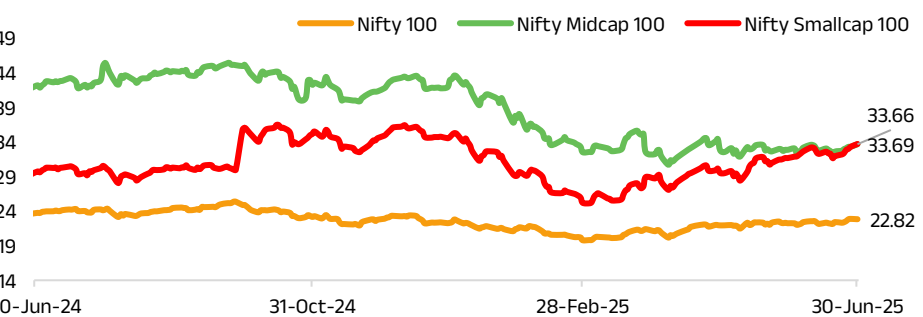
ITI has signed a Rs. 1,901 crore contract with BSNL to execute NER-II Package-15, which encompasses Arunachal Pradesh, Nagaland, and Manipur. The agreement allocates Rs. 1,168 crore for capital expenses, Rs. 700.84 crore for operational costs associated with the new network, and Rs. 32.21 crore for the upkeep of current infrastructure.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



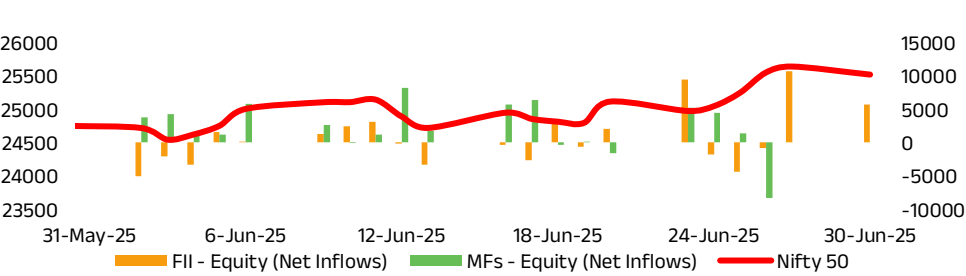
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	5674.78	14,590	38,674	-77,900
MF**	-8324.7	43,278	117,410	229,542
DII	3383.01	69,970	162,592	348,475

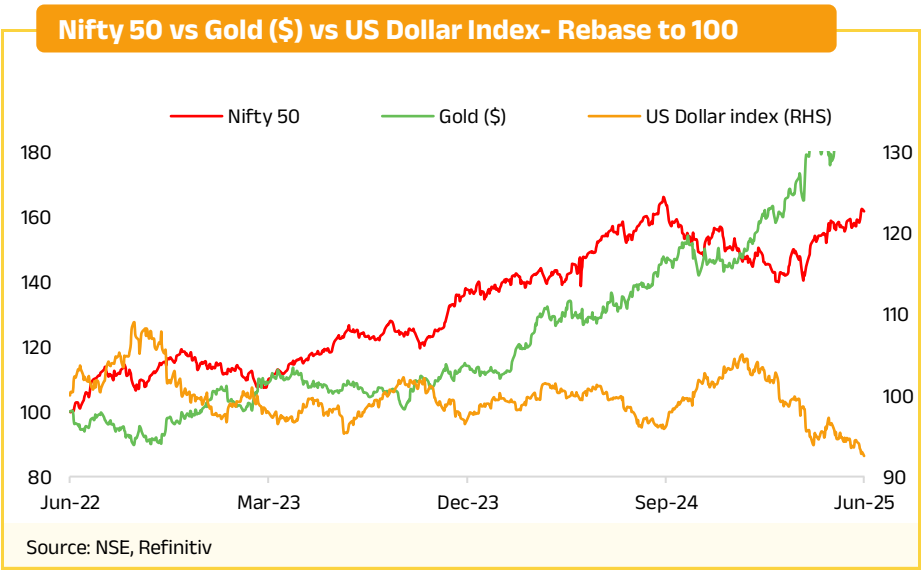
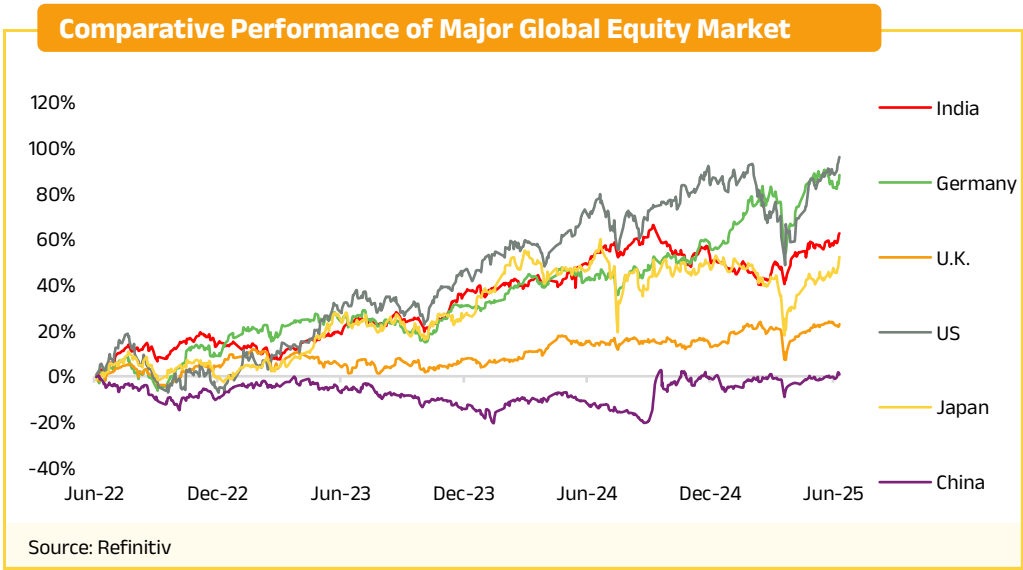
Source: SEBI, NSDL;**As on 26th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25614.20	25750.20	-0.53%
Near Basis	97.15	112.40	-13.57%
Mid Futures	25733.90	25859.10	-0.48%
Mid Basis	216.85	221.30	-2.01%
Near Open Interest (Cr.)	1.44	1.49	-3.25%
Mid Open Interest (Cr.)	0.16	0.15	7.61%
Rollover (%)	10.82	9.59	12.86%
Put Call Ratio (OI)	0.81	1.25	-35.06%
Put Call Ratio(Vol)	0.95	0.85	12.23%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2716	2425	28074
Index Options	926588	941779	320795
Stock Futures	30132	29213	389466
Stock Options	57700	63129	36992
Total	1017136	1036546	775327
Source: NSE			

Global Equity Market				
Global Indices	30-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3395.61	0.53%	2.98%	4.94%
Nasdaq 100 (U.S.)	22679.01	0.64%	3.76%	6.27%
FTSE (U.K.)	8760.96	-0.43%	0.03%	-0.13%
DAX Index (Germany)	23909.61	-0.51%	2.75%	-0.37%
CAC 40 Index (France)	7665.91	-0.33%	1.70%	-1.11%
SSE Composite (China)	3444.43	0.59%	1.86%	2.90%
Nikkei (Japan)	40487.39	0.84%	5.56%	6.64%
Kospi (South Korea)	3071.70	0.52%	1.90%	13.86%
HangSeng (Hong Kong)	24072.28	-0.87%	1.62%	3.36%
Strait Times (Singapore)	3964.29	-0.05%	2.19%	1.79%
Ibovespa Sao Paulo (Brazil)	138854.60	1.45%	1.69%	1.33%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8542.30	0.33%	0.80%	1.28%
Jakarta Composite (Indonesia)	6927.68	0.44%	2.07%	-3.46%
KLSE (Malaysia)	1532.96	0.31%	1.08%	1.63%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	30-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	95,676	0.29%	-3.08%	0.65%
Gold (\$/oz)	3,303.31	0.93%	-1.94%	0.43%
Silver (INR/1 kg)	105,720	0.86%	-1.04%	8.71%
Silver (\$/oz)	36.08	0.28%	-0.14%	9.43%
Brent Crude(\$/bbl)	71.14	0.21%	-10.68%	9.24%
Crude Oil (INR/1 bbl)	5,606.00	0.20%	-12.35%	7.60%
NYMEX Crude(\$/bbl)	66.20	-0.54%	-4.28%	8.06%
Natural Gas (INR/1 mmbtu)	319.90	5.79%	-3.99%	6.24%
Aluminium (INR/1 kg)	249.40	0.58%	-0.74%	5.01%
Copper (INR/1 kg)	892.65	-0.21%	0.13%	2.88%
Nickel (INR/1 kg)	1,320.10	-0.60%	0.79%	-0.85%
Lead (INR/1 kg)	186.50	0.16%	-0.24%	1.28%
Zinc (INR/1 kg)	263.15	0.48%	2.27%	2.79%
Mentha Oil (INR/1 kg)	932.10	-0.10%	-1.23%	-4.62%
Baltic Dry Index	1,489	-2.10%	-11.05%	5.01%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Primary Market

Definition: The primary market is the segment of the capital market where new securities are issued and sold for the first time by companies or governments to raise funds.



Explanation

Think of the primary market as the first point of contact between a company and investors. When a company wants to raise capital, it issues shares through an Initial Public Offering (IPO). Investors buy these shares directly from the company, and the funds go to the issuer. This process helps businesses grow and expand. For example, when Company Z launches its IPO, it offers shares to the public for the first time. Once these shares are sold, they move to the secondary market for regular trading.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.38	5.38	5.26	19.69
Mid Cap Fund	4.74	2.08	5.58	27.41
Large & Mid Cap Fund	4.01	3.50	6.02	24.01
Small Cap Fund	4.24	-0.84	4.29	26.59
Multi Cap Fund	3.75	2.34	5.89	25.01
Focused Fund	3.47	3.82	5.51	21.09
Value Fund	3.26	2.97	3.49	25.17
Contra Fund	3.62	3.41	5.38	26.16
ELSS	3.76	3.31	4.85	22.63
Equity Savings	1.23	3.83	7.04	11.33
Arbitrage Fund	0.53	3.38	6.73	6.60
Dividend Yield Fund	3.06	3.43	2.85	24.15
Aggressive Hybrid Fund	2.74	4.29	6.46	18.53
Balanced Advantage	2.03	3.83	5.80	14.57
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.				