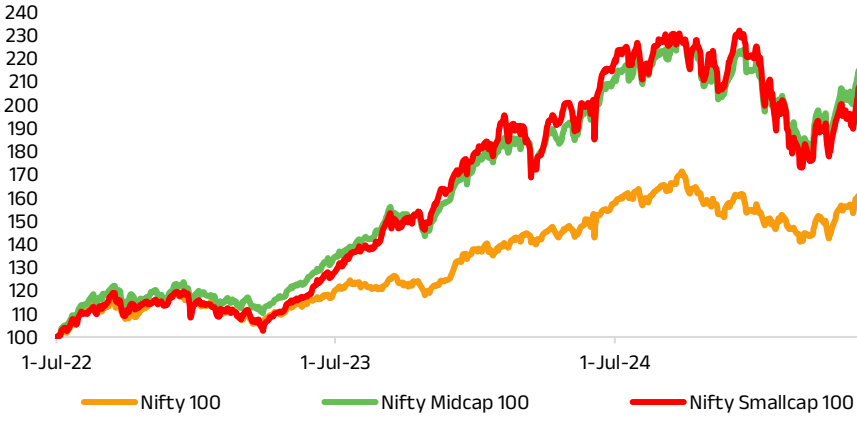


Broad Indices Historical Movement



Source: NSE

Broad Indices

	1-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,541.80	0.10%	1.99%	3.20%
Nifty 100	26,156.10	0.06%	2.05%	3.20%
Nifty 200	14,260.50	0.06%	2.03%	3.35%
Nifty 500	23,615.45	-0.01%	2.17%	3.57%
Nifty Large Midcap 250	16,563.30	-0.05%	2.01%	3.55%
Nifty Midcap 150	21,951.05	-0.17%	1.99%	3.91%
Nifty Next 50	68,930.20	-0.10%	2.35%	3.25%
Nifty Smallcap 250	17,762.00	-0.20%	3.39%	5.52%

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

Smart Beta Index

Index	1-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,912.00	0.03%	1.17%	4.61%
NIFTY 500 Value 50	14,380.15	0.10%	2.97%	4.01%
Nifty 200 Quality 30	20,962.70	-0.30%	1.20%	2.10%
Nifty 50 Equal Weight	32,062.90	0.03%	1.94%	3.74%
NIFTY Alpha Low Volatility 30	27,171.95	-0.06%	1.56%	2.85%
Nifty High Beta 50	3,872.50	0.08%	2.75%	4.16%
Nifty Low Volatility 50	25,361.85	-0.07%	1.55%	2.70%
Nifty Midcap150 Momentum 50	63,676.25	-0.47%	1.06%	4.48%
Nifty PSE	10,086.70	-0.07%	1.75%	2.22%
Nifty SME Emerge	14,812.74	0.20%	1.44%	3.49%
Nifty 100 ESG	5,004.00	-0.20%	1.83%	3.04%

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

Sector Indices

Index	1-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,824.00	-0.20%	0.96%	2.14%
Nifty Bank	57,459.45	0.26%	1.77%	3.07%
Nifty Consumption	11,830.95	-0.10%	1.84%	3.93%
Nifty Financial	27,124.20	-0.18%	1.40%	2.36%
Nifty FMCG	54,502.95	-0.69%	0.29%	-1.41%
Nifty Healthcare	14,494.20	0.21%	2.63%	4.35%
Nifty IT	38,833.15	-0.30%	1.08%	4.05%
Nifty Media	1,731.40	-1.31%	0.15%	1.17%
Nifty Metal	9,564.55	0.31%	2.94%	4.04%
Nifty MNC	28,777.40	-0.55%	1.76%	2.35%
Nifty Pharma	22,041.25	0.01%	1.70%	2.79%
Nifty Realty	984.20	-0.24%	-2.96%	3.67%
Nifty Energy	36,480.10	-0.24%	2.11%	1.68%

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

Nifty 50 Top 5 Gainers

Company	1-Jul-25	Prev_Day	% Change	1 Week
RIL	1,528.40	1,500.60	1.85	5.35
United Phos	671.05	661.25	1.48	4.13
SBI Life Insurance Company Limited	1,862.50	1,838.30	1.32	1.06
Asian Paints	2,369.50	2,341.10	1.21	4.14
Eicher Motors Limited	5,715.50	5,656.50	1.04	1.54

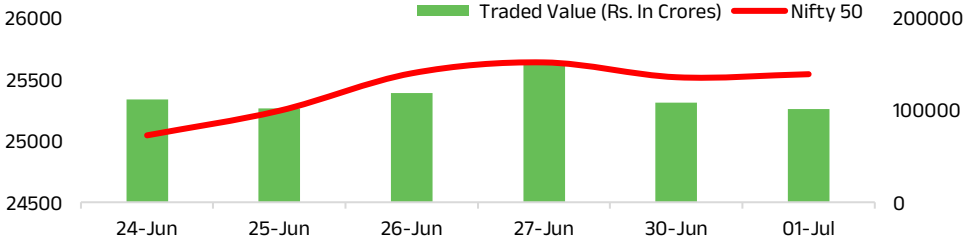
Source: NSE

Nifty 50 Top 5 Losers

Company	1-Jul-25	Prev_Day	% Change	1 Week
Axis Bank	1,173.30	1199	-2.16	-3.92
Britannia Industries Limited	5,743.50	5851	-1.84	2.25
ICICI Bank	1,432.00	1446	-0.95	0.55
Tech Mahindra	1,671.20	1687	-0.94	-0.35
TCS	3,429.70	3462	-0.93	1.16

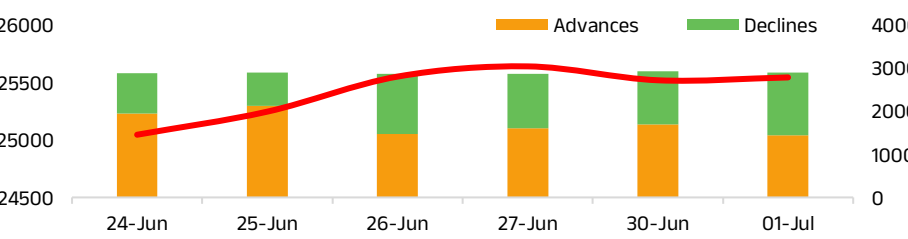
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

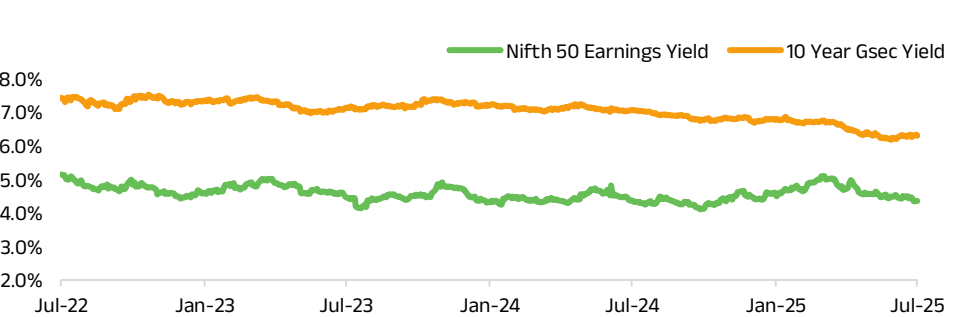
Indian equity markets ended flat with a modest upward bias, as investors remained cautious ahead of the U.S. reciprocal tariff deadline on Jul 8, 2025. Market attention was centered on ongoing trade talks between India and the U.S., with expectations of a possible agreement later this week.

BTPG Group plans to invest Rs. 3000 crores in the development of a premium housing project in Gurugram as a component of its expansion strategy. The company is working on a 12.05-acre project located in Sector 102 along the Dwarka Expressway, Gurugram, which will include approximately 1,600 apartments.

CleanMax has partnered with Toyota Tsusho India to create renewable energy projects with a total capacity of 300 megawatts in India. The company's objective of this new collaboration is to utilize the synergies between the two companies to develop and manage renewable energy projects for Japanese corporations operating in India.

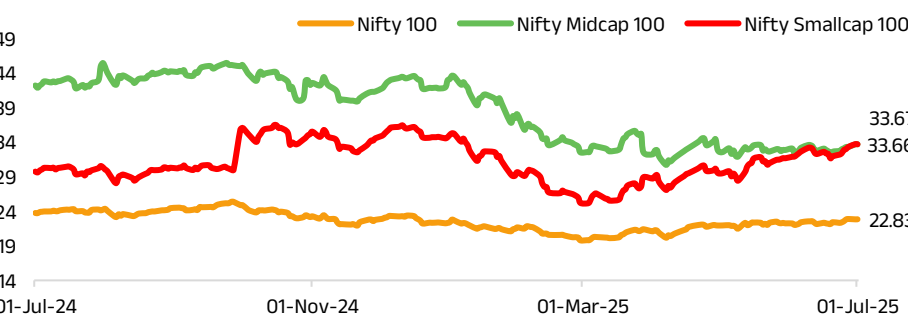
Prestige Estates Projects Ltd aims to achieve a revenue of Rs. 3,350 crore from its forthcoming housing development in Chennai. The firm has initiated a residential project named Prestige Pallavaram Gardens, located on the Pallavaram-Thoraipakkam Radial Road in Chennai.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



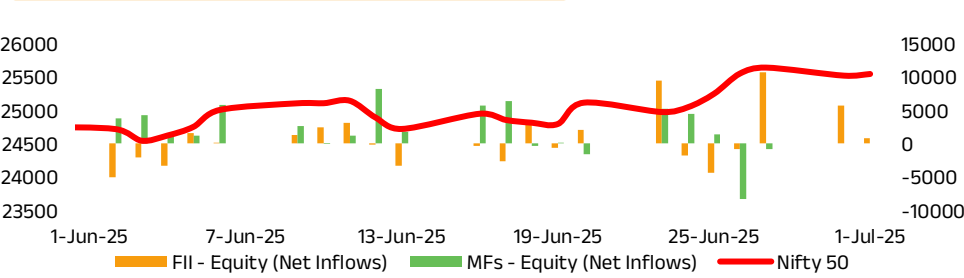
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.				
Description	Net	MTD	QTD	YTD
FII	829.62	830	830	-77,070
MF**	-808.37			228,733
DII	771.08	771	771	349,246

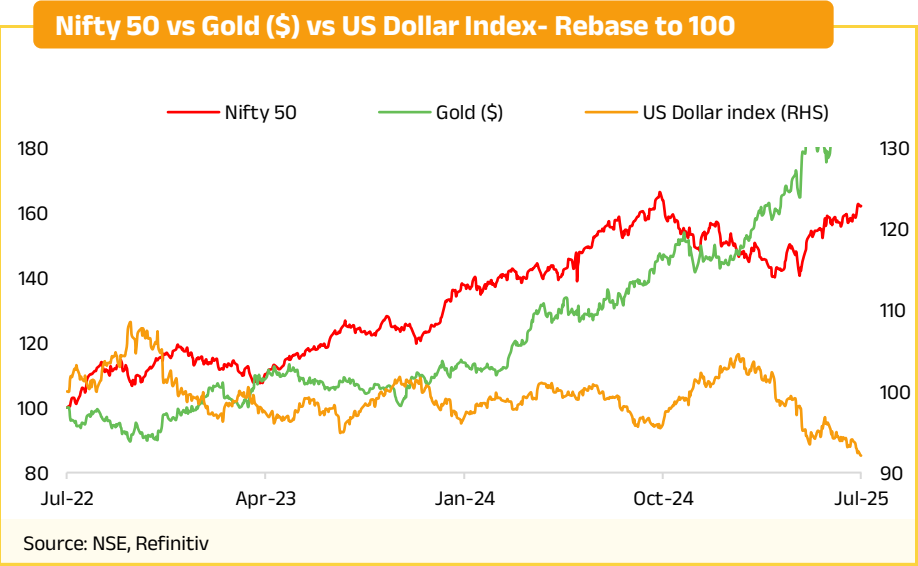
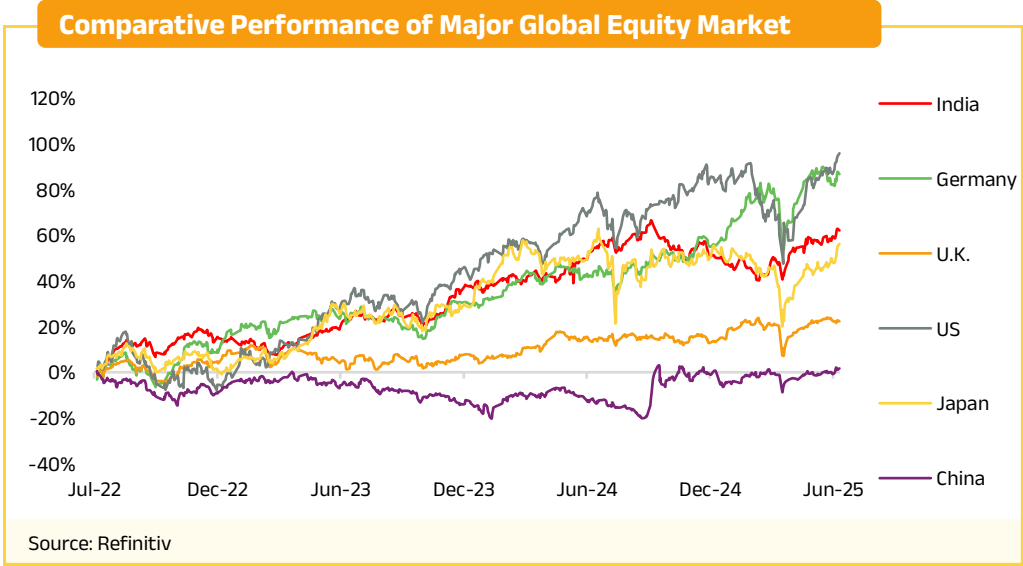
Source: SEBI, NSDL;**As on 27th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25643.30	25614.20	0.11%
Near Basis	101.50	97.15	4.48%
Mid Futures	25756.90	25733.90	0.09%
Mid Basis	215.10	216.85	-0.81%
Near Open Interest (Cr.)	1.45	1.44	0.91%
Mid Open Interest (Cr.)	0.16	0.16	3.63%
Rollover (%)	11.14	10.82	2.97%
Put Call Ratio (OI)	0.88	0.81	8.64%
Put Call Ratio(Vol)	0.92	0.95	-3.94%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3072	3973	27075
Index Options	1236448	1251666	351569
Stock Futures	14669	18160	389109
Stock Options	42186	41992	42607
Total	1296375	1315791	810360
Source: NSE			

Global Equity Market				
Global Indices	1-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3391.83	-0.11%	1.70%	4.82%
Nasdaq 100 (U.S.)	22478.13	-0.89%	1.30%	5.33%
FTSE (U.K.)	8785.33	0.28%	0.30%	0.15%
DAX Index (Germany)	23673.29	-0.99%	0.13%	-1.35%
CAC 40 Index (France)	7662.59	-0.04%	0.61%	-1.15%
SSE Composite (China)	3457.75	0.39%	1.09%	3.29%
Nikkei (Japan)	39986.33	-1.24%	3.08%	5.32%
Kospi (South Korea)	3089.65	0.58%	-0.45%	14.53%
HangSeng (Hong Kong) ^[1]	24072.28	-0.87%	-0.43%	3.36%
Strait Times (Singapore)	3989.76	0.64%	2.19%	2.44%
Ibovespa Sao Paulo (Brazil)	139549.43	0.50%	1.74%	1.84%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8541.10	-0.01%	-0.17%	1.26%
Jakarta Composite (Indonesia)	6915.36	-0.18%	0.67%	-3.63%
KLSE (Malaysia)	1541.53	0.56%	1.80%	2.20%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	1-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,900	1.28%	0.12%	1.94%
Gold (\$/oz)	3,338.83	1.08%	0.45%	1.51%
Silver (INR/1 kg)	106,624	0.86%	0.59%	9.64%
Silver (\$/oz)	36.06	-0.06%	0.44%	9.37%
Brent Crude(\$/bbl)	69.25	-2.66%	-4.42%	6.34%
Crude Oil (INR/1 bbl)	5,566.00	-0.71%	-6.41%	6.83%
NYMEX Crude(\$/bbl)	66.54	0.51%	1.82%	8.62%
Natural Gas (INR/1 mmbtu)	320.50	0.19%	-0.16%	6.44%
Aluminium (INR/1 kg)	248.75	-0.26%	0.00%	4.74%
Copper (INR/1 kg)	900.00	0.82%	1.74%	3.73%
Nickel (INR/1 kg)	1,323.20	0.23%	0.82%	-0.62%
Lead (INR/1 kg)	182.50	-2.14%	-1.27%	-0.90%
Zinc (INR/1 kg)	260.05	-1.18%	0.68%	1.58%
Mentha Oil (INR/1 kg)	941.40	1.00%	0.43%	-3.67%
Baltic Dry Index	1,458	-2.08%	-13.27%	2.82%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Secondary Market

Definition: The secondary market is the segment of the capital market where previously issued securities such as stocks and bonds are bought and sold among investors.



Explanation

Unlike the primary market, where companies raise capital, the secondary market facilitates trading between investors. Stock exchanges like NSE and BSE in India are key platforms for this. For example, if Investor A buys shares of Company X during its IPO, and later sells them to Investor B on the stock exchange, that transaction happens in the secondary market. It provides liquidity, price discovery, and a continuous platform for trading.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.36	4.86	4.57	19.62
Mid Cap Fund	4.53	1.23	4.31	27.15
Large & Mid Cap Fund	3.92	2.80	5.03	23.90
Small Cap Fund	4.23	-2.14	2.78	26.56
Multi Cap Fund	3.69	1.52	4.81	24.88
Focused Fund	3.34	3.18	4.57	20.99
Value Fund	3.28	2.29	2.64	25.11
Contra Fund	3.48	2.65	4.61	26.06
ELSS	3.69	2.57	3.83	22.55
Equity Savings	1.27	3.55	6.80	11.35
Arbitrage Fund	0.56	3.27	6.77	6.66
Dividend Yield Fund	3.08	2.70	2.10	24.13
Aggressive Hybrid Fund	2.72	3.80	5.80	18.51
Balanced Advantage	2.06	3.55	5.32	14.59
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 30 Jun, 2025

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided ‘as is’ without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited’s holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.