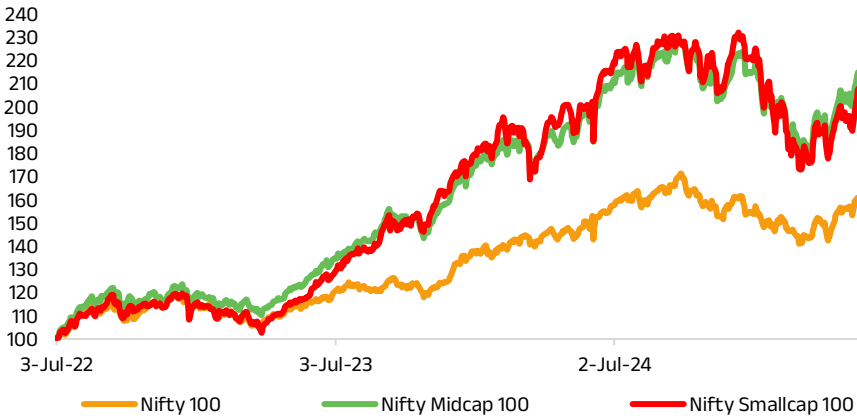


Broad Indices Historical Movement



Source: NSE

Broad Indices

	2-Jul-25	1 Day	1 Week	1 Month
Nifty 50	25,453.40	-0.35%	0.83%	2.98%
Nifty 100	26,068.05	-0.34%	0.95%	2.90%
Nifty 200	14,217.35	-0.30%	1.02%	2.96%
Nifty 500	23,547.25	-0.29%	1.07%	3.12%
Nifty Large Midcap 250	16,531.35	-0.19%	1.16%	3.09%
Nifty Midcap 150	21,940.15	-0.05%	1.38%	3.29%
Nifty Next 50	68,729.80	-0.29%	1.57%	2.52%
Nifty Smallcap 250	17,693.10	-0.39%	1.36%	4.36%

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

Smart Beta Index

Index	2-Jul-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,722.70	-0.59%	-0.03%	3.97%
NIFTY 500 Value 50	14,333.80	-0.32%	2.21%	3.35%
Nifty 200 Quality 30	20,953.10	-0.05%	0.68%	2.01%
Nifty 50 Equal Weight	32,008.60	-0.17%	1.08%	3.66%
NIFTY Alpha Low Volatility 30	27,079.80	-0.34%	0.28%	2.58%
Nifty High Beta 50	3,860.00	-0.32%	1.95%	2.87%
Nifty Low Volatility 50	25,353.60	-0.03%	0.64%	2.78%
Nifty Midcap150 Momentum 50	63,473.00	-0.32%	0.15%	3.80%
Nifty PSE	10,032.70	-0.54%	1.62%	1.29%
Nifty SME Emerge	14,758.66	-0.37%	0.70%	3.59%
Nifty 100 ESG	4,994.40	-0.19%	0.92%	2.85%

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

Sector Indices

Index	2-Jul-25	1 Day	1 Week	1 Month
Nifty Auto	23,899.85	0.32%	0.30%	2.46%
Nifty Bank	56,999.20	-0.80%	0.67%	1.96%
Nifty Consumption	11,845.95	0.13%	0.74%	3.50%
Nifty Financial	26,861.70	-0.97%	0.04%	1.56%
Nifty FMCG	54,439.70	-0.12%	-0.56%	-2.32%
Nifty Healthcare	14,543.90	0.34%	2.02%	4.58%
Nifty IT	38,879.10	0.12%	-0.43%	4.90%
Nifty Media	1,725.15	-0.36%	-2.16%	0.49%
Nifty Metal	9,699.20	1.41%	3.97%	6.25%
Nifty MNC	28,841.35	0.22%	1.21%	2.16%
Nifty Pharma	22,110.80	0.32%	1.40%	3.35%
Nifty Realty	970.05	-1.44%	-4.87%	-0.12%
Nifty Energy	36,331.25	-0.41%	1.43%	1.11%

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

Nifty 50 Top 5 Gainers

Company	2-Jul-25	Prev_Day	% Change	1 Week
JSW Steel	1,059.90	1,029.60	2.94	3.46
Asian Paints	2,419.40	2,369.50	2.11	6.12
Ultratech Cem	12,436.00	12,210.00	1.85	5.99
Shree Cements Limited	31,640.00	31,185.00	1.46	8.82
Maruti	12,622.00	12,442.00	1.45	-1.14

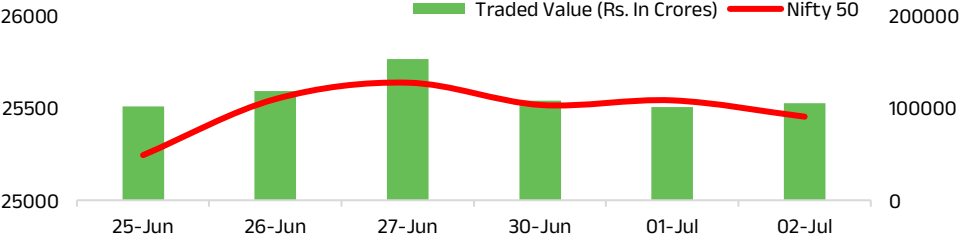
Source: NSE

Nifty 50 Top 5 Losers

Company	2-Jul-25	Prev_Day	% Change	1 Week
HDFC Standard Life Insurance Company	789.70	810	-2.49	0.59
IndusInd Bank	857.65	879	-2.44	3.36
L&T Ltd.	3,596.80	3667	-1.91	-0.64
HDFC Bank	1,986.00	2012	-1.30	0.29
Cipla	1,497.60	1516	-1.19	-0.82

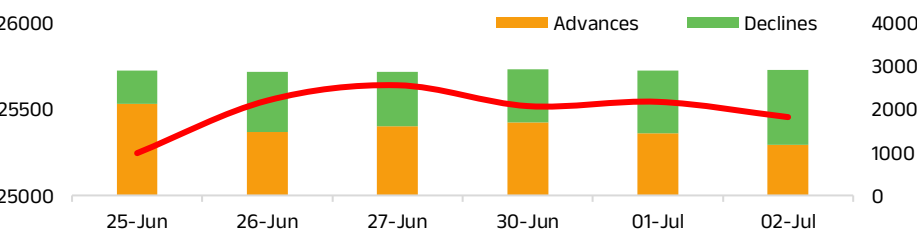
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

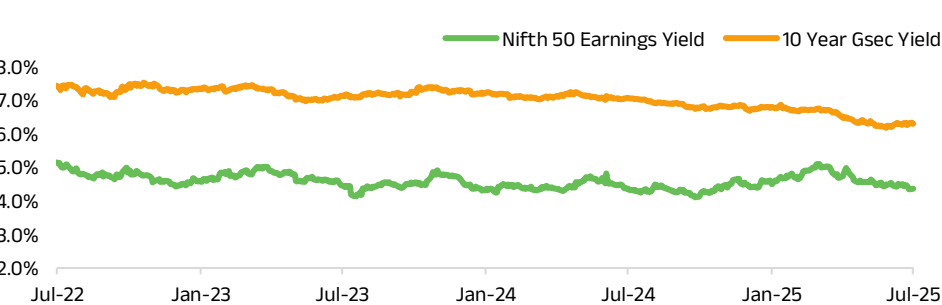
Indian equity markets declined amid ongoing uncertainty over the U.S.-India trade negotiations. Although the U.S. President hinted at an upcoming deal with reduced tariffs, investors are awaiting more details to assess its potential impact on the Indian economy and markets. Mixed global signals and the looming tariff deadline are fueling caution. Market focus is now shifting to Q1 FY26 earnings of domestic firms.

The Adani group has initiated the process of consolidating all its cement operations into a single entity as part of its "One Business, One Company" strategy. This move aims to establish a streamlined and efficient cement powerhouse that will encompass both the Ambuja and ACC brands, among others.

The investment firm 3G Capital, along with Singapore's sovereign wealth fund GIC, has requested authorization from the Competition Commission of India (CCI) to purchase the footwear and apparel company Skechers.

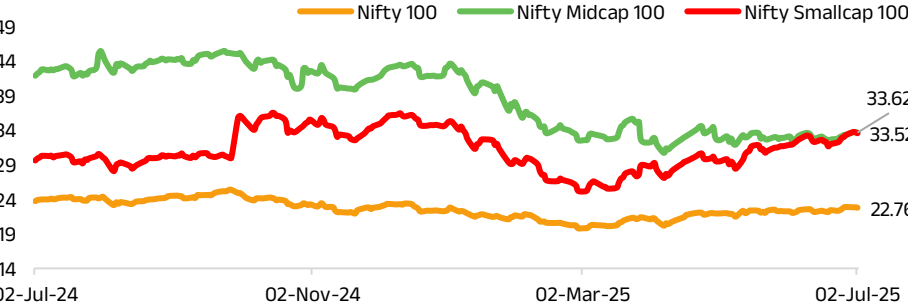
Adani Enterprises Limited (AEL) has successfully finalized the acquisition of an 85.1% stake in Air Works India (Engineering) Pvt. Ltd (AWIEPL) via its wholly owned subsidiary, Adani Defence Systems and Technologies Limited (ADSTL). The deal was valued at Rs. 400 crore for the 85.1% equity in AWIEPL.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



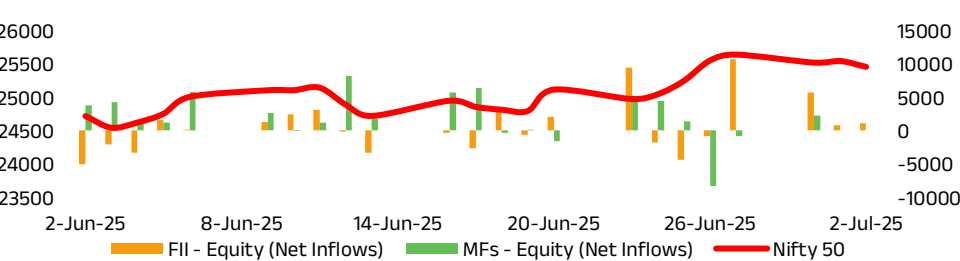
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1105.52	1,935	1,935	-75,965
MF**	2252.7			230,986
DII	3036.68	3,808	3,808	352,283

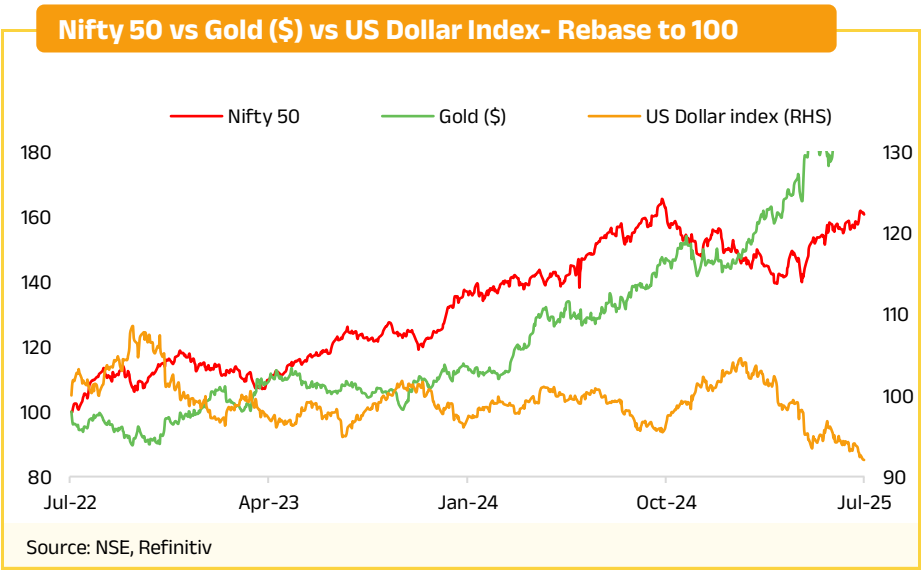
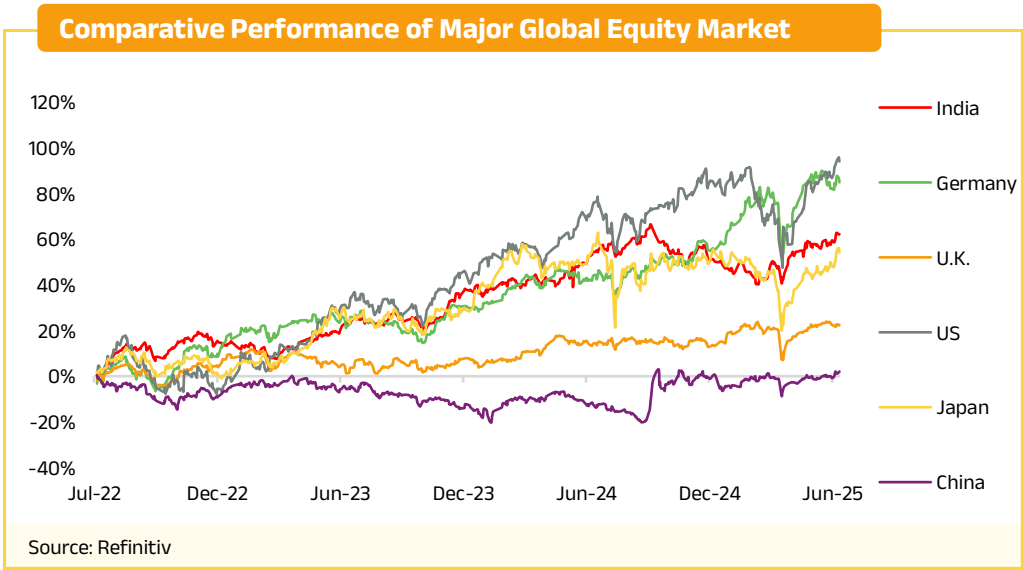
Source: SEBI, NSDL;**As on 30th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25546.10	25643.30	-0.38%
Near Basis	92.70	101.50	-8.67%
Mid Futures	25650.80	25756.90	-0.41%
Mid Basis	197.40	215.10	-8.23%
Near Open Interest (Cr.)	1.41	1.45	-3.17%
Mid Open Interest (Cr.)	0.17	0.16	4.38%
Rollover (%)	12.08	11.14	8.42%
Put Call Ratio (OI)	0.78	0.88	-11.37%
Put Call Ratio(Vol)	1.05	0.92	14.93%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	2333	2446	28078
Index Options	1863758	1860360	318380
Stock Futures	16158	17493	390635
Stock Options	47402	48914	49437
Total	1929653	1929213	786530
Source: NSE			

Global Equity Market				
Global Indices	2-Jul-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3408.89	0.50%	2.29%	4.95%
Nasdaq 100 (U.S.)	22641.89	0.73%	1.82%	5.35%
FTSE (U.K.)	8774.69	-0.12%	0.64%	0.00%
DAX Index (Germany)	23790.11	0.49%	1.24%	-0.59%
CAC 40 Index (France)	7738.42	0.99%	2.38%	0.02%
SSE Composite (China)	3454.79	-0.09%	-0.03%	3.21%
Nikkei (Japan)	39762.48	-0.56%	2.11%	6.12%
Kospi (South Korea)	3075.06	-0.47%	-1.07%	13.93%
HangSeng (Hong Kong)	24221.41	0.62%	-1.03%	4.59%
Strait Times (Singapore)	4010.77	0.53%	2.16%	3.09%
Ibovespa Sao Paulo (Brazil)	139050.93	-0.36%	2.42%	1.66%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8597.70	0.66%	0.45%	2.18%
Jakarta Composite (Indonesia)	6881.24	-0.49%	0.72%	-2.60%
KLSE (Malaysia)	1550.21	0.56%	2.00%	2.78%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	2-Jul-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	97,057	0.16%	0.25%	0.94%
Gold (\$/oz)	3,357.08	0.55%	0.75%	-0.65%
Silver (INR/1 kg)	106,007	-0.58%	0.85%	8.80%
Silver (\$/oz)	36.59	1.47%	0.80%	5.17%
Brent Crude(\$/bbl)	71.24	2.87%	-1.07%	8.00%
Crude Oil (INR/1 bbl)	5,604.00	0.68%	1.10%	7.60%
NYMEX Crude(\$/bbl)	68.56	3.04%	4.07%	8.70%
Natural Gas (INR/1 mmbtu)	292.40	-8.77%	-4.01%	-3.24%
Aluminium (INR/1 kg)	249.50	0.30%	0.85%	4.88%
Copper (INR/1 kg)	900.00	0.00%	1.32%	3.48%
Nickel (INR/1 kg)	1,330.50	0.55%	1.76%	-0.49%
Lead (INR/1 kg)	184.00	0.82%	0.66%	0.93%
Zinc (INR/1 kg)	260.25	0.08%	0.89%	1.54%
Mentha Oil (INR/1 kg)	947.10	0.61%	1.01%	3.10%
Baltic Dry Index	1,443	-1.03%	-13.33%	1.48%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Stock Exchanges

Definition: A stock exchange is a regulated marketplace where securities such as stocks, bonds, and other financial instruments are bought and sold. It facilitates transparent and efficient trading between investors.



Explanation

Stock exchanges play a vital role in the financial system by providing liquidity, price discovery, and investor protection. In India, the major stock exchanges are the Bombay Stock Exchange (BSE) and the National Stock Exchange (NSE). For example, when an investor wants to buy shares of Company A, they place an order through a broker, and the transaction is executed on the exchange. The exchange ensures that trades are settled securely and fairly. It also enforces rules and regulations to maintain market integrity.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.06	2.89	4.39	19.47
Mid Cap Fund	4.09	0.03	4.57	27.11
Large & Mid Cap Fund	3.50	1.20	5.06	23.77
Small Cap Fund	3.70	-2.93	2.54	26.46
Multi Cap Fund	3.40	0.17	4.72	24.79
Focused Fund	3.03	1.47	4.46	20.85
Value Fund	2.89	0.78	2.43	24.97
Contra Fund	3.26	1.31	4.77	25.98
ELSS	3.32	1.10	3.72	22.41
Equity Savings	1.21	3.05	6.75	11.32
Arbitrage Fund	0.54	3.27	6.71	6.66
Dividend Yield Fund	2.81	1.11	2.05	24.04
Aggressive Hybrid Fund	2.44	2.53	5.67	18.41
Balanced Advantage	1.90	2.56	5.25	14.53
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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