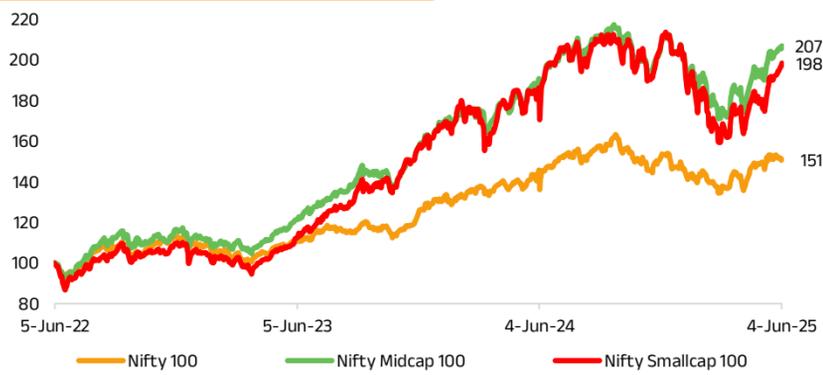


Broad Indices Historical Movement



Source: NSE

Broad Indices

	4-Jun-25	1 Day	1 Week	1 Month
Nifty 50	24,620.20	0.32%	-0.53%	1.12%
Nifty 100	25,240.65	0.31%	-0.47%	1.58%
Nifty 200	13,772.05	0.38%	-0.16%	2.60%
Nifty 500	22,807.85	0.43%	0.12%	3.64%
Nifty Large Midcap 250	16,044.10	0.56%	0.47%	4.83%
Nifty Midcap 150	21,334.60	0.80%	1.38%	8.09%
Nifty Next 50	66,866.60	0.29%	-0.19%	3.78%
Nifty Smallcap 250	17,060.80	0.53%	2.12%	11.11%

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

Smart Beta Index

Index	4-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,738.45	1.00%	1.49%	5.30%
NIFTY 500 Value 50	13,835.35	0.33%	-0.45%	2.72%
Nifty 200 Quality 30	20,490.15	0.27%	-0.74%	4.22%
Nifty 50 Equal Weight	30,727.70	0.26%	-0.86%	1.99%
NIFTY Alpha Low Volatility 30	26,365.50	0.14%	-0.20%	0.87%
Nifty High Beta 50	3,743.80	0.50%	0.84%	9.18%
Nifty Low Volatility 50	24,621.05	0.27%	-0.64%	0.70%
Nifty Midcap150 Momentum 50	61,947.90	1.26%	2.43%	8.32%
Nifty PSE	9,849.65	0.50%	-1.34%	3.36%
Nifty SME Emerge	14,416.69	0.45%	1.40%	6.38%
Nifty 100 ESG	4,833.50	0.24%	-0.71%	2.56%

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

Sector Indices

Index	4-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,332.60	0.27%	-0.45%	4.69%
Nifty Bank	55,676.85	0.14%	0.47%	1.02%
Nifty Consumption	11,425.15	0.39%	0.15%	1.27%
Nifty Financial	26,264.55	0.04%	-0.71%	0.43%
Nifty FMCG	55,530.55	0.13%	-0.31%	-1.28%
Nifty Healthcare	13,892.60	0.21%	-0.15%	-0.54%
Nifty IT	36,938.10	0.33%	-1.41%	2.92%
Nifty Media	1,729.30	0.19%	1.27%	13.67%
Nifty Metal	9,177.40	0.60%	-0.67%	7.74%
Nifty MNC	28,322.20	0.51%	0.70%	5.27%
Nifty Pharma	21,371.70	0.08%	-0.10%	-1.18%
Nifty Realty	976.00	-0.70%	3.29%	10.71%
Nifty Energy	35,734.20	0.52%	-0.43%	4.67%

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

Nifty 50 Top 5 Gainers

Company	4-Jun-25	Prev_Day	% Change	1 Week
Bharti Airtel	1,875.40	1,841.30	1.85	1.04
IndusInd Bank	814.35	800.85	1.69	1.14
Divi's Lab	6,618.00	6,530.00	1.35	-0.27
RIL	1,423.50	1,405.50	1.28	0.75
United Phos	642.55	635.35	1.13	1.87

Source: NSE

Nifty 50 Top 5 Losers

Company	4-Jun-25	Prev_Day	% Change	1 Week
Axis Bank	1,171.00	1182	-0.89	-1.98
TCS	3,380.90	3405	-0.71	-3.34
Eicher Motors Limited	5,319.50	5354	-0.64	-0.13
Britannia Industries Limited	5,542.00	5576	-0.60	1.26
Titan Industries Limited	3,499.80	3520	-0.57	-2.10

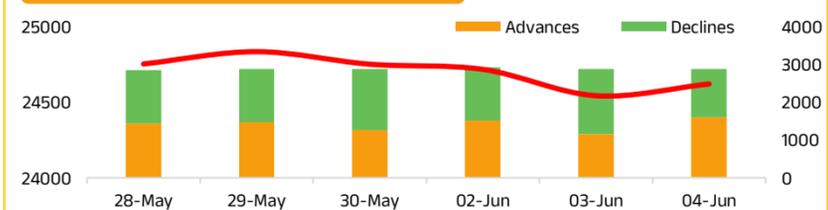
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

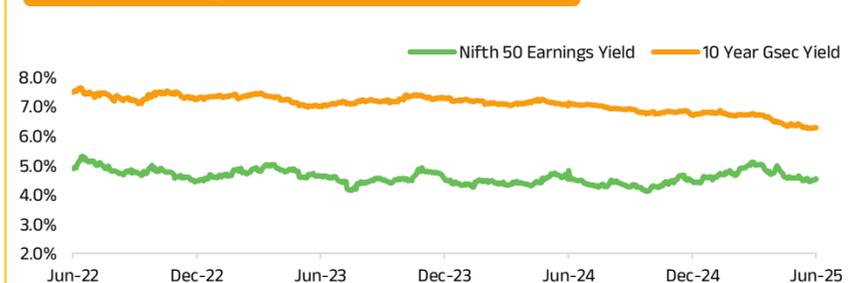
Indian equity markets ended their three-day losing streak, buoyed by positive global trends, despite ongoing uncertainty over the U.S.-China trade talks. Investors are now turning their attention to the RBI's policy meeting, which concludes on Jun 6, 2025, with hopes for a rate cut and clearer guidance on future economic growth and inflation.

Realty company County Group is set to invest Rs. 1,800 crore in the development of a housing project in Ghaziabad as a component of its expansion strategy. The firm has introduced a new project named 'Jade County', which spans 13.33 acres and includes approximately 1,000 units.

Carlyle Group divested its complete 10.2% stake in Indegene, a digital healthcare services provider, for Rs. 1,447 crore through transactions in the open market. The company via its subsidiary CA Dawn Investments, sold over 2.44 crore shares, which corresponds to a 10.20% stake in Indegene.

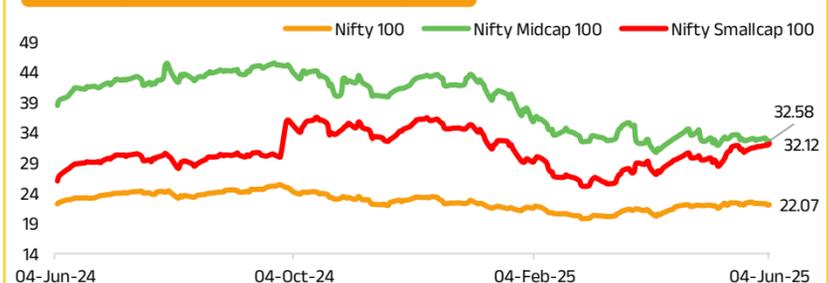
Vedanta Ltd announced on that it has expanded its renewable energy power capacity to 1.03 GW. The firm stated that it is progressing towards its objective of attaining 2.5 GW of clean energy by the year 2030.

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	INR Cr.
				YTD
FII	-3295.02	-10,404	13,679	-102,895
MF**	3729.99	3,730	77,861	189,993
DII	2566.82	13,789	106,410	292,294

Source: SEBI, NSDL;**As on 2nd Jun 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24729.40	24675.30	0.22%
Near Basis	109.20	132.80	-17.77%
Mid Futures	24865.40	24816.20	0.20%
Mid Basis	245.20	273.70	-10.41%
Near Open Interest (Cr.)	1.25	1.27	-1.86%
Mid Open Interest (Cr.)	0.40	0.35	13.13%
Rollover (%)	24.65	22.09	11.61%
Put Call Ratio (OI)	0.73	0.65	13.27%
Put Call Ratio(Vol)	0.79	0.82	-4.00%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3505	6052	27368
Index Options	2557996	2638535	389594
Stock Futures	18290	20928	370570
Stock Options	44492	47574	47632
Total	2624283	2713088	835164

Source: NSE

Global Equity Market

Global Indices	4-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3269.20	0.02%	1.41%	5.08%
Nasdaq 100 (U.S.)	21721.92	0.27%	1.89%	8.06%
FTSE (U.K.)	8801.29	0.16%	0.86%	2.38%
DAX Index (Germany)	24276.48	0.77%	0.99%	5.15%
CAC 40 Index (France)	7804.67	0.53%	0.21%	0.44%
SSE Composite (China)	3376.20	0.42%	1.09%	2.96%
Nikkei (Japan)	37747.45	0.80%	0.07%	2.49%
Kospi (South Korea)	2770.84	2.66%	3.77%	8.24%
HangSeng (Hong Kong)	23654.03	0.60%	1.70%	5.11%
Strait Times (Singapore)	3903.88	0.24%	-0.21%	1.53%
Ibovespa Sao Paulo (Brazil)	137001.58	-0.40%	-1.36%	1.38%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8541.80	0.89%	1.73%	3.69%
Jakarta Composite (Indonesia)	7069.04	0.34%	-1.49%	3.72%
KLSE (Malaysia)	1507.97	0.31%	-1.02%	-2.24%

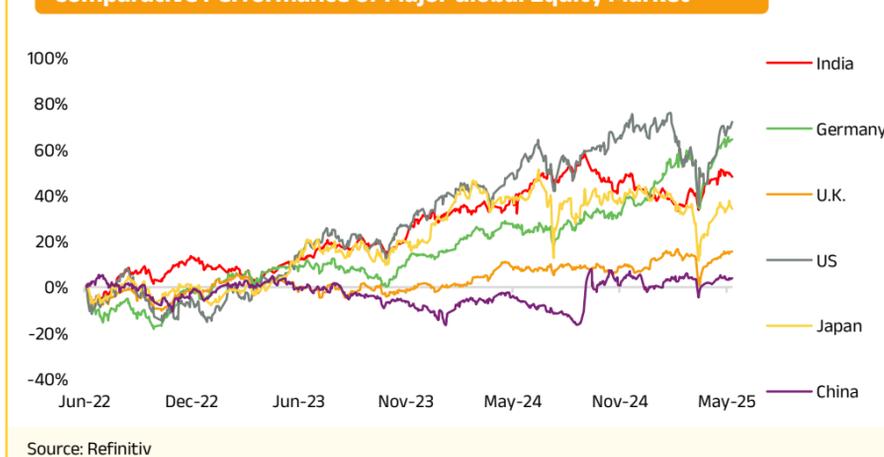
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

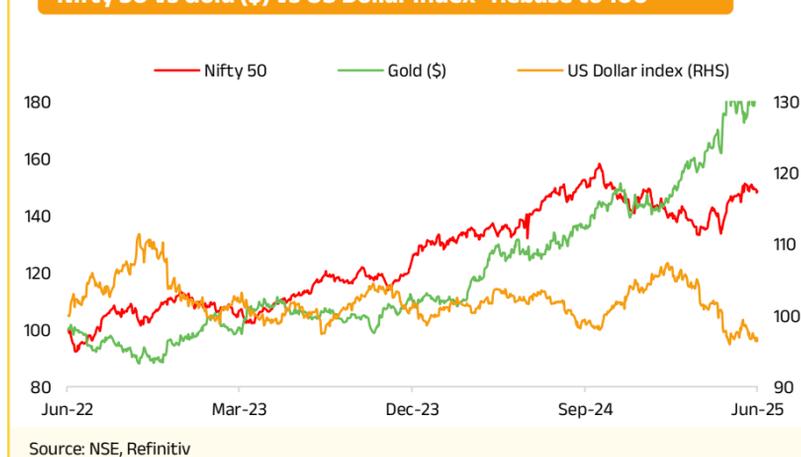
Commodity Prices	4-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,722	0.28%	1.26%	3.36%
Gold (\$/oz)	3,375.42	0.70%	2.62%	4.18%
Silver (INR/1 kg)	101,138	0.98%	3.53%	7.42%
Silver (\$/oz)	34.96	1.33%	5.96%	9.32%
Brent Crude(\$/bbl)	67.37	-1.74%	1.77%	9.33%
Crude Oil (INR/1 bbl)	5,419.00	1.46%	4.31%	7.54%
NYMEX Crude(\$/bbl)	63.37	-0.83%	1.65%	6.56%
Natural Gas (INR/1 mmbtu)	318.10	0.79%	9.73%	7.50%
Aluminium (INR/1 kg)	242.35	1.61%	0.87%	3.35%
Copper (INR/1 kg)	878.00	0.80%	1.08%	4.37%
Nickel (INR/1 kg)	1,342.50	0.37%	1.19%	0.94%
Lead (INR/1 kg)	181.25	0.11%	-0.71%	0.30%
Zinc (INR/1 kg)	260.15	0.77%	0.10%	4.27%
Mentha Oil (INR/1 kg)	916.00	-0.28%	-6.64%	-7.33%
Baltic Dry Index ^[1]	1,430	0.56%	9.75%	0.63%

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



Double Dip Recession

Definition: When an economy or a country's Gross Domestic Product (GDP) growth is negative for the second time following a short period of positive growth, the phenomenon is termed as double dip recession.



Explanation

This type of pattern or movement is extremely damaging for an economy. It hits the confidence of consumers and businesses in the country. Due to this, double dip recession may sometimes lead to a prolonged period of recession before final recovery. The first recession often leads to layoffs and spending cuts, as a result of which the demand for goods and services fall, leading to the second recession.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.98	-1.39	11.81	16.59
Mid Cap Fund	7.35	-3.21	15.31	24.20
Large & Mid Cap Fund	4.98	-2.40	14.48	20.86
Small Cap Fund	9.20	-6.49	14.96	23.38
Multi Cap Fund	5.56	-3.28	13.83	21.88
Focused Fund	3.83	-2.63	13.16	18.09
Value Fund	4.01	-3.53	11.60	21.96
Contra Fund	3.39	-3.11	13.48	23.14
ELSS	4.91	-2.88	12.94	19.50
Equity Savings	1.36	2.03	9.57	10.43
Arbitrage Fund	0.38	3.22	6.53	6.58
Dividend Yield Fund	3.15	-3.46	10.55	20.91
Aggressive Hybrid Fund	3.01	-0.41	12.78	16.20
Balanced Advantage	2.04	0.25	10.02	12.95

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 03 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.