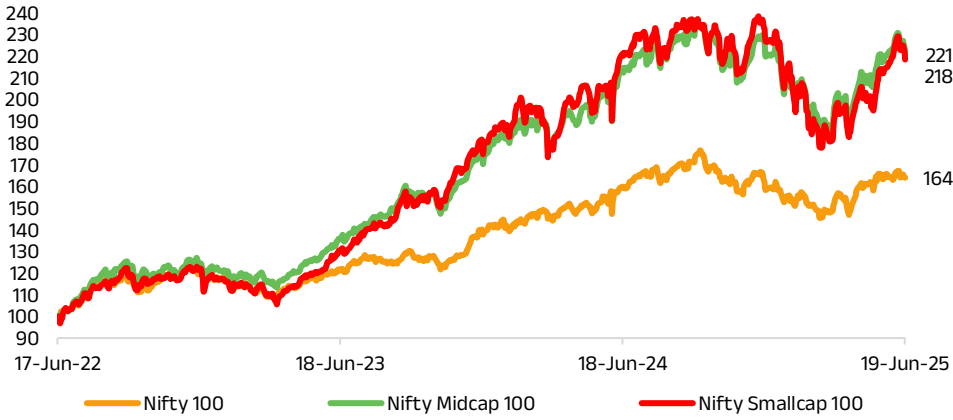


Broad Indices Historical Movement



Source: NSE

Broad Indices

	19-Jun-25	1 Day	1 Week	1 Month
Nifty 50	24,793.25	-0.08%	-0.38%	-0.61%
Nifty 100	25,320.45	-0.31%	-0.75%	-0.90%
Nifty 200	13,777.10	-0.53%	-1.00%	-0.74%
Nifty 500	22,763.50	-0.71%	-1.23%	-0.45%
Nifty Large Midcap 250	15,947.80	-0.96%	-1.53%	-0.37%
Nifty Midcap 150	21,022.95	-1.57%	-2.26%	0.14%
Nifty Next 50	65,848.15	-1.41%	-2.50%	-2.31%
Nifty Smallcap 250	16,813.05	-1.93%	-2.68%	1.79%

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

Smart Beta Index

Index	19-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,975.45	-0.82%	-0.51%	1.33%
NIFTY 500 Value 50	13,668.80	-1.23%	-2.49%	-2.01%
Nifty 200 Quality 30	20,511.00	-0.86%	-0.88%	-1.14%
Nifty 50 Equal Weight	31,044.45	-0.15%	-0.47%	-0.56%
NIFTY Alpha Low Volatility 30	26,566.50	-0.13%	-0.61%	-0.67%
Nifty High Beta 50	3,628.20	-2.15%	-3.63%	-1.32%
Nifty Low Volatility 50	24,774.60	-0.20%	-0.40%	-1.28%
Nifty Midcap150 Momentum 50	61,310.60	-1.61%	-1.80%	0.84%
Nifty PSE	9,735.40	-1.15%	-1.85%	-2.31%
Nifty SME Emerge	14,412.01	-1.01%	-1.45%	2.02%
Nifty 100 ESG	4,846.00	-0.52%	-1.10%	-1.01%

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

Sector Indices

Index	19-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,434.65	0.52%	0.10%	-2.57%
Nifty Bank	55,577.45	-0.45%	-0.90%	0.28%
Nifty Consumption	11,450.60	0.08%	0.00%	-1.67%
Nifty Financial	26,299.65	-0.38%	-1.05%	-0.79%
Nifty FMCG	54,283.50	-0.31%	-1.49%	-4.69%
Nifty Healthcare	13,963.95	-0.65%	-2.51%	-1.15%
Nifty IT	38,664.95	-0.94%	0.53%	3.17%
Nifty Media	1,668.95	-1.91%	-3.15%	-0.16%
Nifty Metal	9,040.45	-1.29%	-3.30%	-1.85%
Nifty MNC	28,023.35	-0.87%	-0.93%	-0.78%
Nifty Pharma	21,441.85	-0.68%	-2.70%	-1.37%
Nifty Realty	992.75	-1.60%	-1.36%	6.38%
Nifty Energy	35,273.85	-1.10%	-1.79%	-1.17%

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

Nifty 50 Top 5 Gainers

Company	19-Jun-25	Prev_Day	% Change	1 Week
Tata Beverages	1,088.30	1,065.20	2.17	0.29
Eicher Motors Limited	5,493.50	5,393.00	1.86	3.35
M&M	3,094.80	3,041.10	1.77	2.50
Wipro	265.58	261.59	1.53	2.30
Titan Industries Limited	3,505.40	3,467.80	1.08	1.53

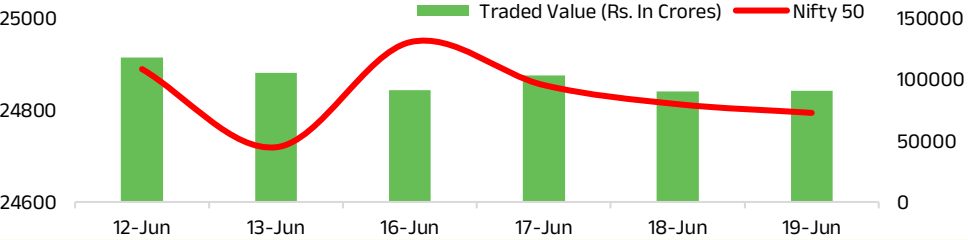
Source: NSE

Nifty 50 Top 5 Losers

Company	19-Jun-25	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,338.00	1373	-2.52	-7.46
Coal India	384.25	390	-1.56	-2.15
Tech Mahindra	1,684.00	1711	-1.56	2.41
IndusInd Bank	837.50	851	-1.53	0.92
Indian Oil	138.67	141	-1.53	-3.02

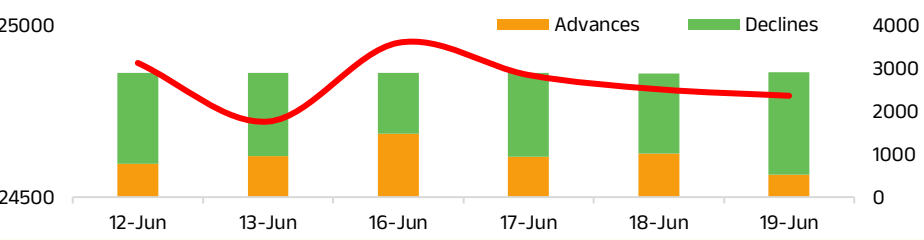
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

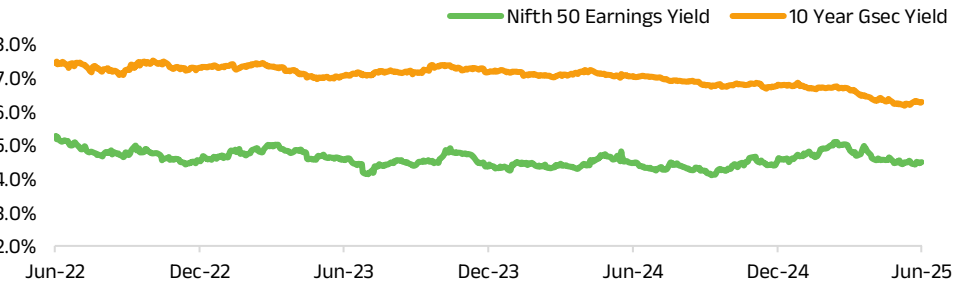
 Indian equity markets closed marginally lower, moving in a rangebound fashion with a negative bias as a cautious undertone prevailed among investors in response to hawkish commentary from the U.S. Federal Reserve and rising tensions in the Middle East.

 Amazon plans to invest over Rs. 2,000 crore (approximately \$233 million) in India in 2025 to enhance its logistics and safety standards. This investment will be allocated towards the expansion and modernization of the company's infrastructure, initiatives focused on employee safety and wellness, as well as the development of technologies for its fulfillment network.

 Attero intends to allocate Rs. 100 crore to enhance its rare earth recycling capacity from 300 tonnes to 30,000 tonnes within the next 12 to 24 months. In Apr 2025, China enacted export restrictions on rare earth, an essential mineral utilized in the production of electronics, automobiles, and various other technological products.

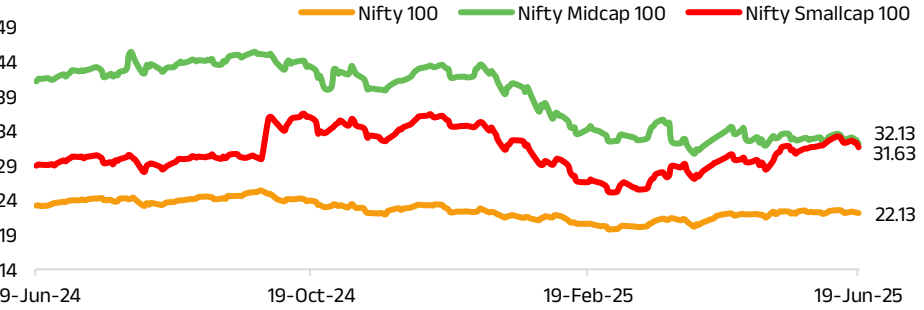
 The fast-moving consumer goods (FMCG) division of Reliance Retail Ventures, known as Reliance Consumer Products Ltd (RCPL), plans to invest between Rs. 6,000 and Rs. 8,000 crore in the upcoming 12 to 15 months to enhance its beverage manufacturing capabilities.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



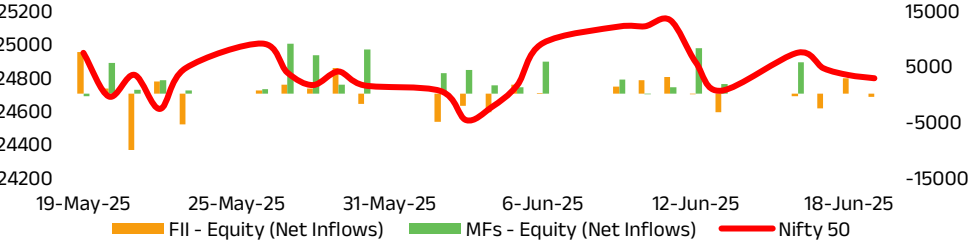
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII's & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	YTD
FII	-597.59	-6,232	17,852	-98,722
MF**	5671.97	35,943	110,075	222,207
DII	605.97	59,836	152,458	338,341

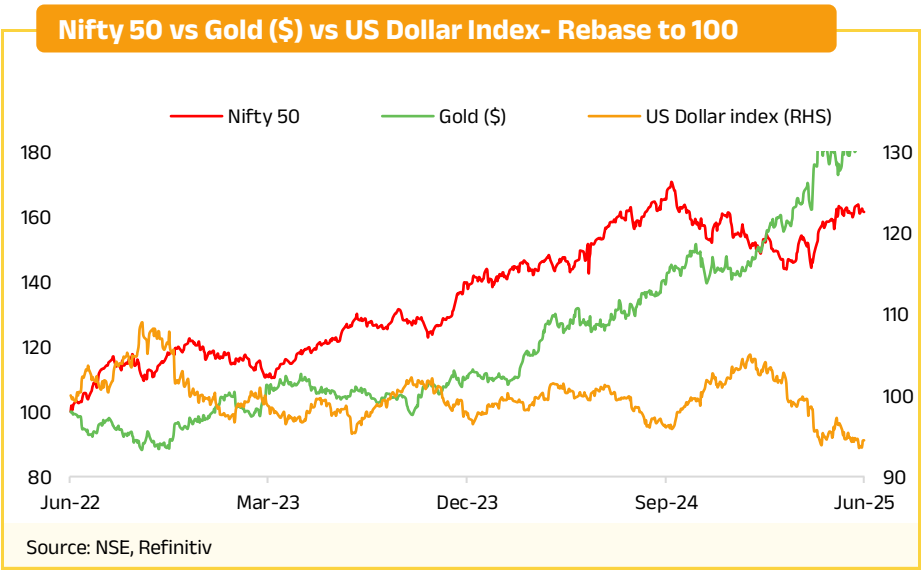
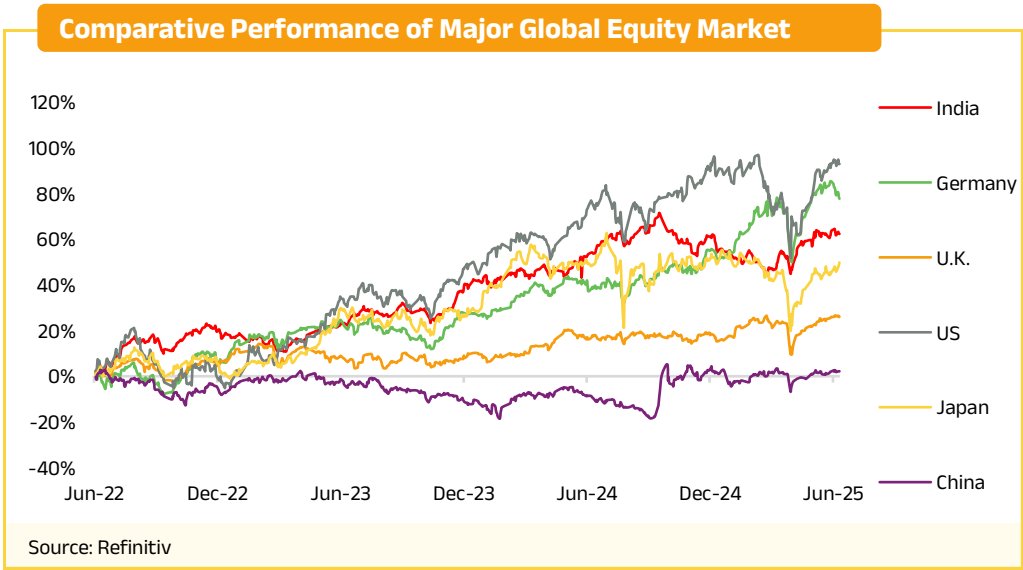
Source: SEBI, NSDL;**As on 16th Jun 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24803.10	24826.90	-0.10%
Near Basis	9.85	14.85	-33.67%
Mid Futures	24915.50	24941.60	-0.10%
Mid Basis	122.25	129.55	-5.63%
Near Open Interest (Cr.)	1.11	1.12	-0.95%
Mid Open Interest (Cr.)	0.66	0.64	3.56%
Rollover (%)	39.60	38.58	2.64%
Put Call Ratio (OI)	0.98	0.80	22.60%
Put Call Ratio(Vol)	0.96	1.01	-4.99%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3205	3164	30141
Index Options	1446658	1462492	394539
Stock Futures	16419	18200	387531
Stock Options	78477	79040	111118
Total	1544759	1562895	923329
Source: NSE			

Global Equity Market				
Global Indices	19-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.) ^[1]	3273.81	0.00%	-1.04%	0.24%
Nasdaq 100 (U.S.) ^[1]	21719.69	0.00%	-0.88%	1.27%
FTSE (U.K.)	8791.80	-0.58%	-1.05%	1.06%
DAX Index (Germany)	23057.38	-1.12%	-3.00%	-3.67%
CAC 40 Index (France)	7553.45	-1.34%	-2.73%	-4.19%
SSE Composite (China)	3362.11	-0.79%	-1.19%	-0.16%
Nikkei (Japan)	38488.34	-1.02%	0.83%	2.64%
Kospi (South Korea)	2977.74	0.19%	1.98%	14.38%
HangSeng (Hong Kong)	23237.74	-1.99%	-3.32%	-0.41%
Strait Times (Singapore)	3894.18	-0.68%	-0.71%	0.46%
Ibovespa Sao Paulo (Brazil) ^[1]	138716.64	-0.09%	0.67%	-0.66%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8523.70	-0.09%	-0.48%	2.76%
Jakarta Composite (Indonesia)	6968.64	-1.96%	-3.27%	-2.41%
KLSE (Malaysia)	1501.44	-0.70%	-1.65%	-3.52%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	19-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,886	-0.05%	2.16%	6.03%
Gold (\$/oz)	3,372.28	0.11%	-0.35%	4.44%
Silver (INR/1 kg)	107,235	-1.78%	2.14%	12.43%
Silver (\$/oz)	36.44	-0.81%	0.18%	12.65%
Brent Crude(\$/bbl)	82.06	4.03%	13.31%	24.24%
Crude Oil (INR/1 bbl)	6,485.00	0.64%	11.35%	21.28%
NYMEX Crude(\$/bbl) ^[1]	75.69	0.36%	10.45%	18.67%
Natural Gas (INR/1 mmbtu)	344.30	3.83%	14.88%	20.68%
Aluminium (INR/1 kg)	245.85	-0.22%	1.30%	2.91%
Copper (INR/1 kg)	878.60	-0.78%	0.14%	2.18%
Nickel (INR/1 kg)	1,320.00	0.53%	0.00%	-1.42%
Lead (INR/1 kg)	185.50	0.00%	1.50%	0.30%
Zinc (INR/1 kg)	255.40	-0.08%	-0.16%	-1.96%
Mentha Oil (INR/1 kg)	942.90	0.02%	-0.15%	-4.53%
Baltic Dry Index ^[1]	1,874	-4.00%	-1.58%	39.12%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Value and Growth Fund

Definition: Growth and value are the two most common investment strategies. These two styles of investment have different set of characteristics that make either, or both suitable for investors based on the investment objective of the investor. During different economic conditions, either of these strategies can dominate.



Explanation

A basic principal behind value investing is that markets are inefficient and investors can benefit from this anomaly. In other words, value investing is about finding stocks that the market has not correctly priced. It involves buying a stock on the basis of its fundamentals which include earning growth, cash flow, dividend yield, book value and replacement cost. If the **company's** fundamentals are strong but the **stock's** price is below its obvious value, then there arises a value investing opportunity. On the other hand, growth investing targets stocks which have above average earning growth rate, above average sales growth rate and low dividend yield.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.48	0.57	3.56	19.66
Mid Cap Fund	0.87	-3.99	2.16	26.75
Large & Mid Cap Fund	0.29	-1.99	3.41	23.65
Small Cap Fund	1.34	-7.28	1.44	26.11
Multi Cap Fund	0.45	-3.08	2.37	24.70
Focused Fund	-0.08	-1.23	3.44	20.94
Value Fund	-0.29	-2.17	1.37	24.94
Contra Fund	-0.17	-1.95	3.07	25.90
ELSS	0.28	-2.08	2.45	22.42
Equity Savings	0.15	2.27	6.43	11.35
Arbitrage Fund	0.55	3.38	6.73	6.64
Dividend Yield Fund	-0.16	-1.31	1.37	24.21
Aggressive Hybrid Fund	-0.01	0.25	4.89	18.35
Balanced Advantage	-0.09	0.75	4.49	14.39
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 18 Jun, 2025