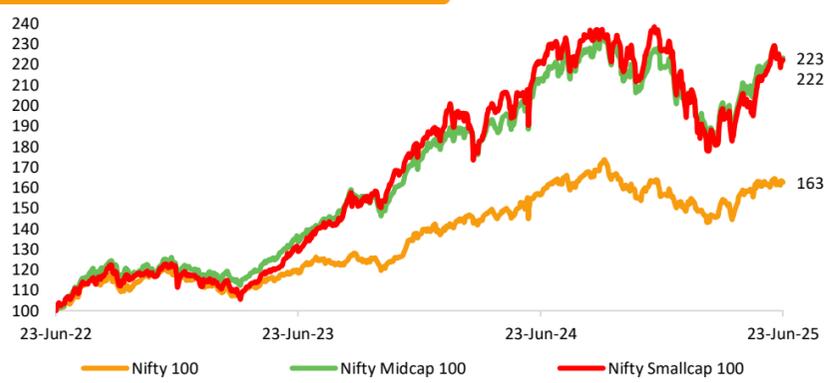


Broad Indices Historical Movement



Source: NSE

Broad Indices

	23-Jun-25	1 Day	1 Week	1 Month
Nifty 50	24,971.90	-0.56%	0.10%	0.48%
Nifty 100	25,532.95	-0.45%	-0.09%	0.31%
Nifty 200	13,915.75	-0.31%	-0.24%	0.71%
Nifty 500	23,001.50	-0.17%	-0.41%	0.97%
Nifty Large Midcap 250	16,148.35	-0.01%	-0.58%	1.36%
Nifty Midcap 150	21,371.30	0.40%	-1.03%	2.38%
Nifty Next 50	66,780.50	0.07%	-1.03%	-0.47%
Nifty Smallcap 250	17,048.00	0.77%	-1.44%	3.12%

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

Smart Beta Index

Index	23-Jun-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,529.60	0.07%	0.46%	3.81%
NIFTY 500 Value 50	13,883.10	0.40%	-0.83%	-0.14%
Nifty 200 Quality 30	20,668.05	-0.18%	-0.64%	0.36%
Nifty 50 Equal Weight	31,325.15	-0.23%	0.01%	0.72%
NIFTY Alpha Low Volatility 30	26,581.95	-0.62%	-0.90%	0.03%
Nifty High Beta 50	3,729.45	1.01%	-0.76%	1.75%
Nifty Low Volatility 50	24,847.30	-0.48%	-0.58%	-0.17%
Nifty Midcap150 Momentum 50	62,646.90	0.33%	-0.21%	3.70%
Nifty PSE	9,948.45	0.64%	-0.38%	0.02%
Nifty SME Emerge	14,521.68	-0.22%	-0.87%	2.57%
Nifty 100 ESG	4,886.95	-0.36%	-0.39%	0.33%

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

Sector Indices

Index	23-Jun-25	1 Day	1 Week	1 Month
Nifty Auto	23,461.15	-0.92%	0.40%	-0.23%
Nifty Bank	56,059.35	-0.34%	0.20%	1.19%
Nifty Consumption	11,580.60	-0.35%	0.84%	0.45%
Nifty Financial	26,556.50	-0.35%	0.01%	0.27%
Nifty FMCG	54,226.85	-0.74%	-1.18%	-4.03%
Nifty Healthcare	14,083.20	-0.21%	-2.17%	0.73%
Nifty IT	38,414.10	-1.48%	-1.69%	2.70%
Nifty Media	1,748.40	4.39%	0.72%	3.88%
Nifty Metal	9,198.55	0.66%	-1.71%	-0.55%
Nifty MNC	28,087.90	-0.43%	-0.90%	0.09%
Nifty Pharma	21,626.20	0.06%	-1.88%	0.90%
Nifty Realty	1,012.65	-0.10%	-0.75%	8.09%
Nifty Energy	35,608.95	0.02%	-1.11%	-0.08%

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

Nifty 50 Top 5 Gainers

Company	23-Jun-25	Prev_Day	% Change	1 Week
Hindalco	661.40	649.15	1.89	1.82
Indian Oil	139.92	138.65	0.92	-1.36
Coal India	392.50	389.05	0.89	-0.47
United Phos	638.85	633.50	0.84	-0.76
Tata Beverages	1,109.40	1,100.20	0.84	2.40

Source: NSE

Nifty 50 Top 5 Losers

Company	23-Jun-25	Prev_Day	% Change	1 Week
Infosys	1,584.00	1623	-2.40	-2.45
L&T Ltd.	3,583.70	3662	-2.14	-1.24
HCL Tech	1,703.20	1740	-2.11	-1.15
Hero Moto	4,253.10	4339	-1.97	-2.55
M&M	3,135.00	3184	-1.55	3.68

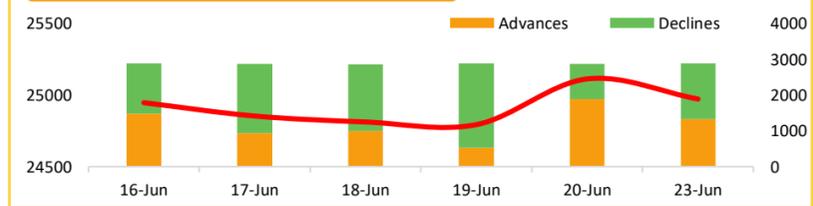
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE



Indian equity markets declined as investors appeared to take the U.S. strikes on nuclear targets in Iran in stride, opting to wait and see how Iran responds and what implications this has for Tehran's nuclear program. There was a general consensus that the U.S. strikes would delay Iran's ability to develop nuclear weapons, which is seen as a short-term positive development.



Brigade Enterprises aims to achieve a revenue of Rs. 2,100 crore from its latest housing initiative in Chennai. The firm has introduced a 14.7-acre project named Brigade Morgan Heights, situated along the Sholinganallur-Medavakkam road in Chennai, which includes 1,250 units.

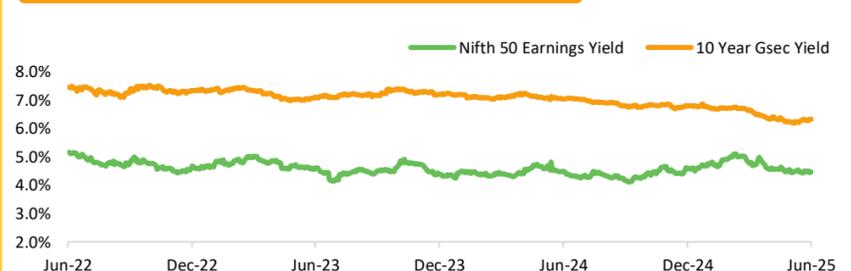


ACME Solar Holdings announced that it has obtained a domestic project finance facility amounting to Rs. 1,072 crore for its subsidiary, ACME Aklera Power Technology. This funding is intended to refinance the existing debt associated with its 250 MW operational project located in Rajasthan.



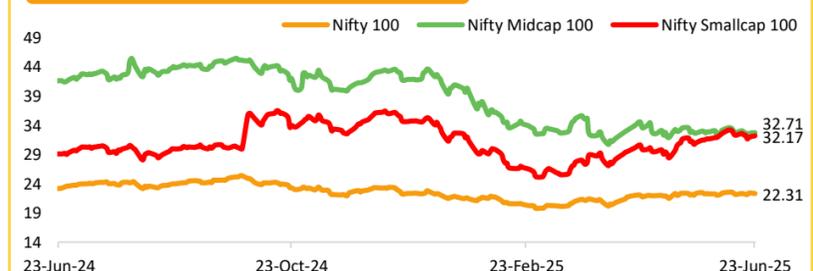
Adani Group has launched India's inaugural off-grid 5 megawatt green hydrogen pilot plant located in Kutch, Gujarat. An off-grid green hydrogen facility is one that generates hydrogen through electrolysis, utilizing renewable energy sources like solar or wind, and operates independently from the main electrical grid.

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	INR Cr.			
	Net	MTD	QTD	YTD
FII	9471.58	5,280	29,363	-87,211
MF**	173.69	42,593	116,724	228,857
DII	3228.5	60,015	152,637	338,520

Source: SEBI, NSDL; **As on 19th Jun 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24993.30	25111.70	-0.47%
Near Basis	21.40	-0.70	-3157.14%
Mid Futures	25102.30	25201.20	-0.39%
Mid Basis	130.40	88.80	46.85%
Near Open Interest (Cr.)	0.92	1.09	-15.61%
Mid Open Interest (Cr.)	0.85	0.72	17.97%
Rollover (%)	50.70	42.54	19.17%
Put Call Ratio (OI)	1.04	1.16	-10.20%
Put Call Ratio(Vol)	0.80	0.76	5.69%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	6437	6318	33523
Index Options	1321456	1343893	450891
Stock Futures	40563	36160	392894
Stock Options	114729	109091	115895
Total	1483186	1495462	993203

Source: NSE

Global Equity Market

Global Indices	23-Jun-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3297.48	0.94%	-0.11%	3.79%
Nasdaq 100 (U.S.)	21856.33	1.06%	-0.37%	4.50%
FTSE (U.K.)	8758.04	-0.19%	-1.32%	0.46%
DAX Index (Germany)	23269.01	-0.35%	-1.81%	-1.53%
CAC 40 Index (France)	7537.57	-0.69%	-2.64%	-2.54%
SSE Composite (China)	3381.58	0.65%	-0.21%	0.99%
Nikkei (Japan)	38354.09	-0.13%	0.11%	3.21%
Kospi (South Korea)	3014.47	-0.24%	2.30%	16.29%
HangSeng (Hong Kong)	23689.13	0.67%	-1.55%	0.37%
Strait Times (Singapore)	3879.26	-0.11%	-0.75%	-0.08%
Ibovespa Sao Paulo (Brazil)	136550.50	-0.41%	-1.94%	-0.92%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8474.90	-0.36%	-0.86%	1.36%
Jakarta Composite (Indonesia)	6787.14	-1.74%	-4.64%	-5.92%
KLSE (Malaysia)	1516.61	0.92%	-0.22%	-1.22%

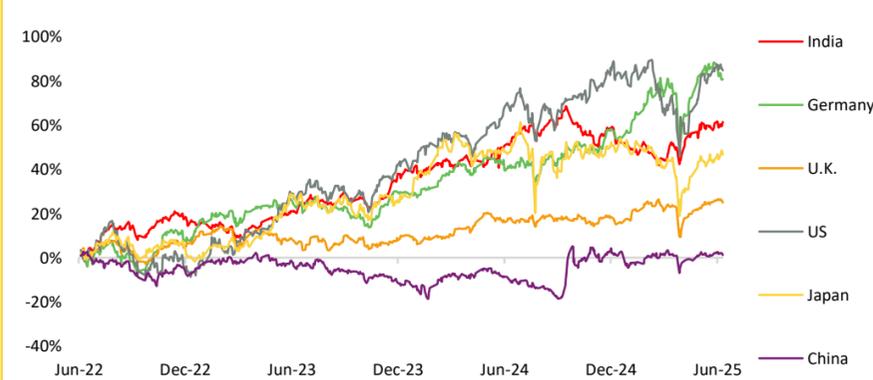
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	23-Jun-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	98,718	0.42%	-0.14%	3.68%
Gold (\$/oz)	3,368.51	0.02%	-0.43%	0.34%
Silver (INR/1 kg)	106,829	0.33%	0.47%	10.30%
Silver (\$/oz)	36.13	0.40%	-0.55%	7.92%
Brent Crude(\$/bbl)	79.65	-0.13%	6.20%	20.12%
Crude Oil (INR/1 bbl)	6,396.00	-1.37%	1.80%	21.99%
NYMEX Crude(\$/bbl)	69.16	-8.42%	-4.38%	10.32%
Natural Gas (INR/1 mmbtu)	333.20	-3.22%	8.08%	19.56%
Aluminium (INR/1 kg)	251.25	2.43%	3.12%	5.46%
Copper (INR/1 kg)	891.50	1.15%	1.02%	3.62%
Nickel (INR/1 kg)	1,309.80	-0.53%	-1.39%	-2.63%
Lead (INR/1 kg)	186.95	0.05%	2.35%	3.17%
Zinc (INR/1 kg)	257.30	0.61%	0.90%	-1.49%
Mentha Oil (INR/1 kg)	943.70	-0.43%	-0.02%	-4.33%
Baltic Dry Index	1,674	-0.89%	-15.24%	24.93%

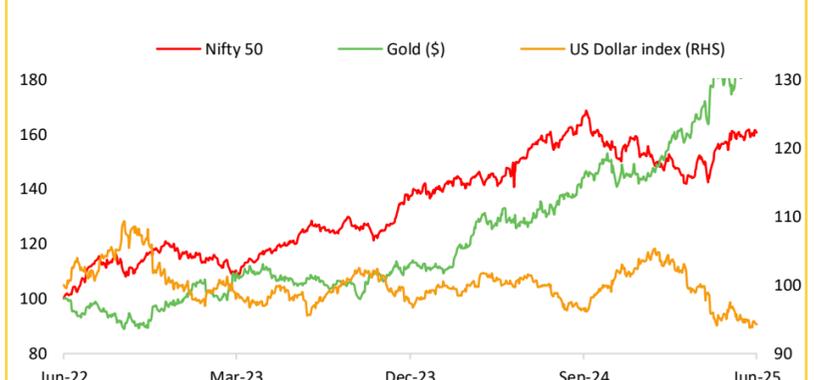
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Source: Refinitiv

Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Source: NSE, Refinitiv

Term of the Day



Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.77	2.60	4.58	19.31
Mid Cap Fund	2.66	-0.55	3.28	27.02
Large & Mid Cap Fund	1.80	0.80	4.43	23.64
Small Cap Fund	2.47	-4.01	1.91	26.39
Multi Cap Fund	1.74	-0.28	4.30	24.72
Focused Fund	1.31	1.21	4.45	20.73
Value Fund	0.74	0.03	1.99	24.83
Contra Fund	1.27	0.58	4.08	25.88
ELSS	1.54	0.50	3.23	22.27
Equity Savings	0.53	2.93	6.64	11.27
Arbitrage Fund	0.51	3.24	6.63	6.64
Dividend Yield Fund	0.83	0.84	1.83	24.04
Aggressive Hybrid Fund	0.95	2.11	5.55	18.23
Balanced Advantage	0.58	2.14	5.03	14.32

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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