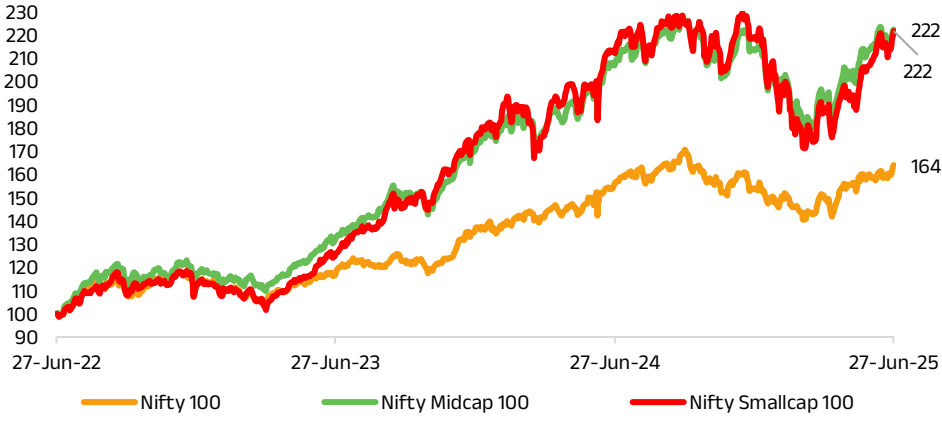


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 27-Jun-25 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|-------|--------|---------|
| Nifty 50 | 25,637.80 | 0.35% | 2.09% | 3.27% |
| Nifty 100 | 26,223.60 | 0.39% | 2.24% | 3.09% |
| Nifty 200 | 14,276.05 | 0.37% | 2.27% | 3.23% |
| Nifty 500 | 23,620.15 | 0.44% | 2.51% | 3.52% |
| Nifty Large Midcap 250 | 16,542.80 | 0.40% | 2.43% | 3.47% |
| Nifty Midcap 150 | 21,840.20 | 0.40% | 2.61% | 3.83% |
| Nifty Next 50 | 68,712.40 | 0.61% | 2.97% | 2.26% |
| Nifty Smallcap 250 | 17,642.30 | 0.81% | 4.29% | 6.04% |

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

Smart Beta Index

| Index | 27-Jun-25 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index | 31,852.15 | -0.15% | 1.10% | 4.69% |
| NIFTY 500 Value 50 | 14,305.55 | 0.53% | 3.45% | 2.81% |
| Nifty 200 Quality 30 | 21,017.15 | 0.51% | 1.50% | 1.49% |
| Nifty 50 Equal Weight | 32,126.80 | 0.37% | 2.32% | 3.17% |
| NIFTY Alpha Low Volatility 30 | 27,251.90 | 0.37% | 1.88% | 2.52% |
| Nifty High Beta 50 | 3,837.95 | 0.33% | 3.95% | 3.64% |
| Nifty Low Volatility 50 | 25,464.75 | 0.40% | 1.99% | 2.24% |
| Nifty Midcap150 Momentum 50 | 63,544.00 | -0.07% | 1.77% | 4.79% |
| Nifty PSE | 10,078.10 | 0.73% | 1.96% | 1.02% |
| Nifty SME Emerge | 14,681.53 | 0.34% | 0.88% | 3.34% |
| Nifty 100 ESG | 5,020.90 | 0.35% | 2.38% | 2.91% |

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

Sector Indices

| Index | 27-Jun-25 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 24,007.95 | 0.19% | 1.39% | 1.74% |
| Nifty Bank | 57,443.90 | 0.41% | 2.12% | 3.78% |
| Nifty Consumption | 11,870.65 | 0.13% | 2.15% | 3.13% |
| Nifty Financial | 27,344.05 | 0.35% | 2.61% | 3.49% |
| Nifty FMCG | 55,109.00 | -0.02% | 0.88% | -2.54% |
| Nifty Healthcare | 14,411.65 | 0.71% | 2.12% | 2.90% |
| Nifty IT | 38,822.95 | -0.44% | -0.43% | 3.52% |
| Nifty Media | 1,747.85 | 0.23% | 4.36% | 3.42% |
| Nifty Metal | 9,578.20 | 0.35% | 4.81% | 3.05% |
| Nifty MNC | 28,858.35 | 0.56% | 2.30% | 2.26% |
| Nifty Pharma | 21,928.60 | 0.55% | 1.46% | 1.88% |
| Nifty Realty | 993.95 | -1.55% | -1.94% | 5.04% |
| Nifty Energy | 36,542.60 | 1.00% | 2.65% | 1.84% |

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

Nifty 50 Top 5 Gainers

| Company | 27-Jun-25 | Prev_Day | % Change | 1 Week |
|-----------------------|-----------|-----------|----------|--------|
| Shree Cements Limited | 31,030.00 | 30,105.00 | 3.07 | 7.46 |
| Asian Paints | 2,358.70 | 2,289.80 | 3.01 | 3.19 |
| IndusInd Bank | 857.70 | 836.10 | 2.58 | 2.08 |
| Ultratech Cem | 12,213.00 | 11,951.00 | 2.19 | 6.59 |
| Power Grid | 299.25 | 293.50 | 1.96 | 2.10 |

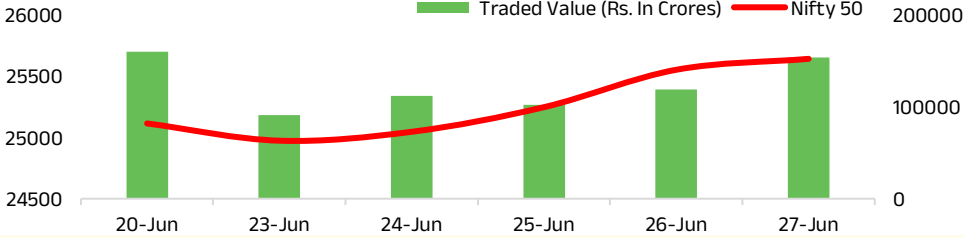
Source: NSE

Nifty 50 Top 5 Losers

| Company | 27-Jun-25 | Prev_Day | % Change | 1 Week |
|--------------------------|-----------|----------|----------|--------|
| Tata Beverages | 1,124.30 | 1145 | -1.84 | 2.19 |
| Wipro | 265.05 | 269 | -1.29 | -0.56 |
| Tech Mahindra | 1,674.40 | 1690 | -0.93 | -1.28 |
| ONGC | 242.83 | 245 | -0.78 | -3.60 |
| Titan Industries Limited | 3,666.20 | 3695 | -0.77 | 4.18 |

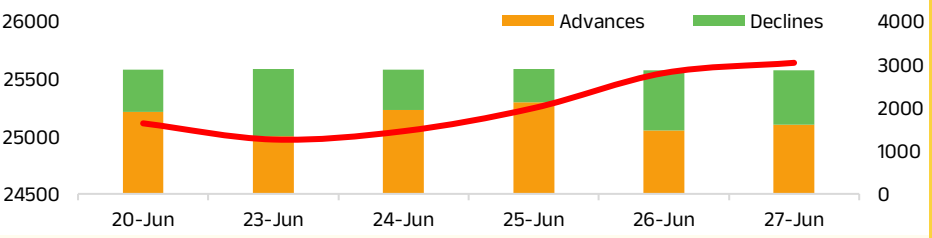
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

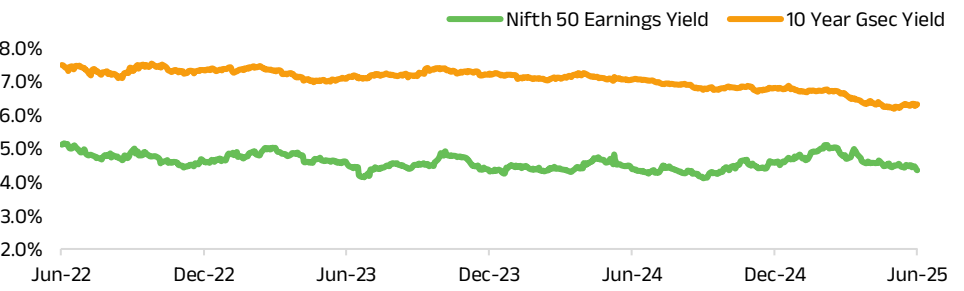
Indian equity markets advanced for the fourth consecutive session, supported by an easing of geopolitical tensions in the Middle East. This de-escalation of conflict alleviated concerns over potential global economic repercussions, leading to a decline in crude oil prices and renewed investor confidence.

JSW Paints has entered into definitive agreements to purchase as much as 74.76% of Akzo Nobel India Ltd, the producers of the Dulux paint brand, from its Dutch parent company for Rs. 8,986 crore. This transaction represents one of the largest deals in India's paint industry. The conglomerate intends to secure financing for the acquisition through various methods.

DHL Express, a global express shipping company, announced the inauguration of a new service center at AISATS Logistics Park in Bengaluru, with an investment of 3.43 million euros (approximately Rs. 34 crore).

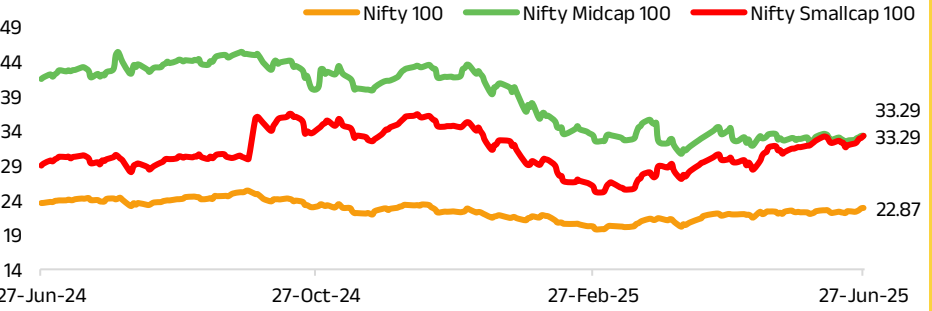
The Mazagon Dock Shipbuilders Limited (MDL), which is India's Public Sector Shipyard, has declared a "proposed acquisition" of a controlling interest in Colombo Dockyard PLC (CDPLC), Sri Lanka's largest and most established shipyard, with a valuation of up to \$52.96 million.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



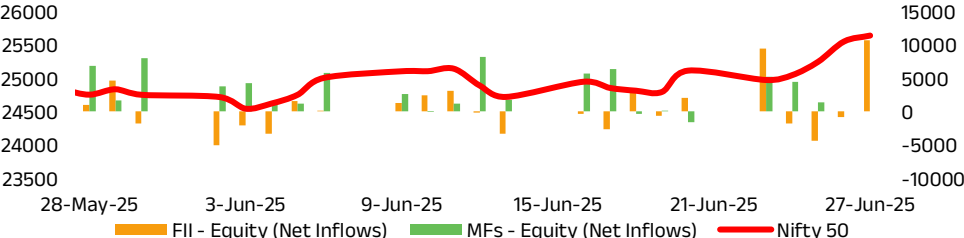
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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 | 10662.98 | 8,916 | 32,999 | -83,575 |
| MF** | 1337.48 | 51,603 | 125,734 | 237,866 |
| DII | -588.93 | 66,587 | 159,209 | 345,092 |

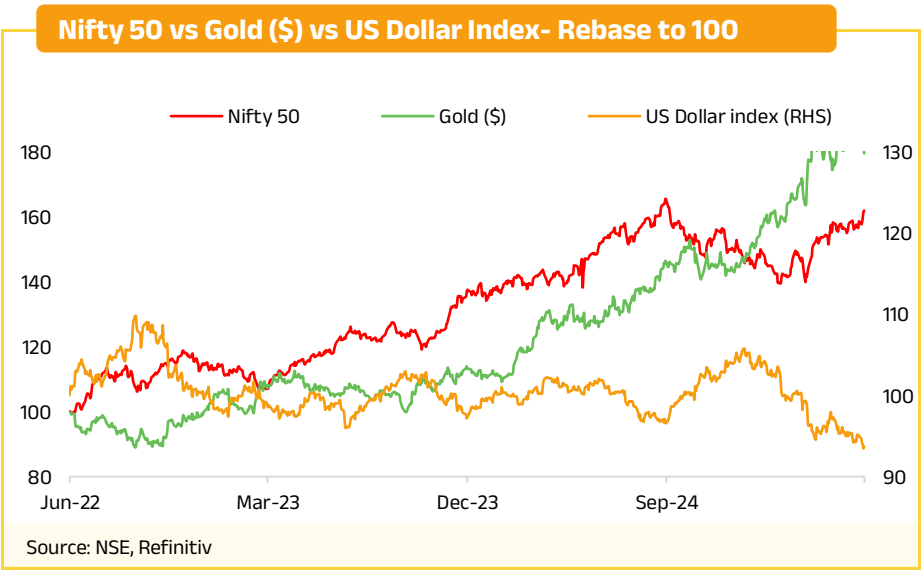
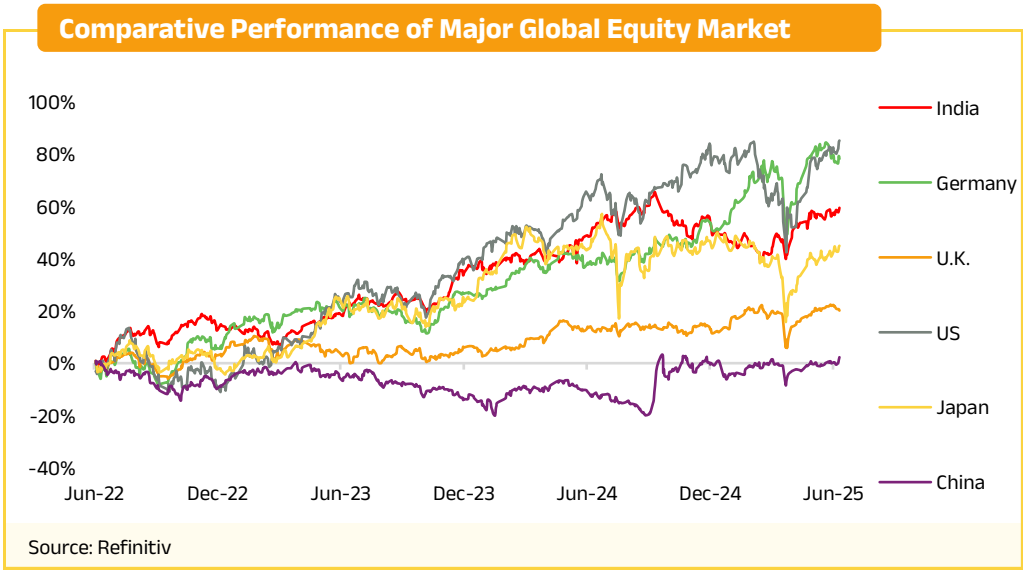
Source: SEBI, NSDL;**As on 25th Jun 2025;

| F&O Trends | | | |
|--------------------------|----------|----------|----------|
| | Latest | Previous | Change % |
| Near Futures | 25750.20 | 25551.00 | 0.78% |
| Near Basis | 112.40 | 2.00 | 5520.00% |
| Mid Futures | 25859.10 | 25615.00 | 0.95% |
| Mid Basis | 221.30 | 66.00 | 235.30% |
| Near Open Interest (Cr.) | 1.49 | 0.42 | 255.54% |
| Mid Open Interest (Cr.) | 0.15 | 1.48 | -90.06% |
| Rollover (%) | 9.59 | 79.53 | -87.95% |
| Put Call Ratio (OI) | 1.25 | 1.29 | -3.05% |
| Put Call Ratio(Vol) | 0.85 | 0.90 | -5.13% |
| Source: NSE | | | |


| FII Derivative Trade Statistics | | | |
|---------------------------------|---------|---------|-----------|
| | Buy | Sell | Open Int. |
| Index Futures | 13044 | 8238 | 27900 |
| Index Options | 5998186 | 5968500 | 266744 |
| Stock Futures | 55010 | 51843 | 388233 |
| Stock Options | 60062 | 55571 | 22468 |
| Total | 6126303 | 6084152 | 705345 |
| Source: NSE | | | |

| Global Equity Market | | | | |
|---|-----------|--------|--------|---------|
| Global Indices | 27-Jun-25 | 1 Day | 1 Week | 1 Month |
| Russell 1000 Index (U.S.) | 3377.83 | 0.51% | 3.40% | 4.18% |
| Nasdaq 100 (U.S.) | 22534.20 | 0.39% | 4.20% | 5.23% |
| FTSE (U.K.) | 8798.91 | 0.72% | 0.28% | 0.24% |
| DAX Index (Germany) | 24033.22 | 1.62% | 2.92% | -0.80% |
| CAC 40 Index (France) | 7691.55 | 1.78% | 1.34% | -1.73% |
| SSE Composite (China) | 3424.23 | -0.70% | 1.91% | 2.50% |
| Nikkei (Japan) | 40150.79 | 1.43% | 4.55% | 6.43% |
| Kospi (South Korea) | 3055.94 | -0.77% | 1.13% | 15.88% |
| HangSeng (Hong Kong) | 24284.15 | -0.17% | 3.20% | 3.86% |
| Strait Times (Singapore) | 3966.20 | 0.70% | 2.13% | 1.80% |
| Ibovespa Sao Paulo (Brazil) | 136865.79 | -0.18% | -0.18% | -1.92% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8514.20 | -0.43% | 0.10% | 1.27% |
| Jakarta Composite (Indonesia) ^[1] | 6897.40 | 0.96% | -0.14% | -4.19% |
| KLSE (Malaysia) ^[1] | 1528.16 | 0.55% | 1.69% | 0.13% |
| Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose. | | | | |

| Global & Domestic Commodity Market | | | | |
|--|-----------|--------|---------|---------|
| Commodity Prices | 27-Jun-25 | 1 Day | 1 Week | 1 Month |
| Gold (INR/10 gm) | 95,398 | -1.38% | -2.96% | 0.49% |
| Gold (\$/oz) | 3,273.00 | -1.65% | -2.82% | -0.80% |
| Silver (INR/1 kg) | 104,819 | -2.08% | -1.56% | 8.44% |
| Silver (\$/oz) | 35.98 | -1.75% | -0.02% | 8.05% |
| Brent Crude(\$/bbl) | 70.99 | -0.74% | -10.98% | 8.80% |
| Crude Oil (INR/1 bbl) | 5,595.00 | 0.36% | -13.72% | 6.13% |
| NYMEX Crude(\$/bbl) | 66.56 | 0.33% | -11.86% | 8.39% |
| Natural Gas (INR/1 mmbtu) | 302.40 | 3.38% | -12.17% | 5.85% |
| Aluminium (INR/1 kg) | 247.95 | -0.34% | 1.08% | 4.49% |
| Copper (INR/1 kg) | 894.50 | 0.24% | 1.49% | 3.51% |
| Nickel (INR/1 kg) | 1,328.10 | -0.49% | 0.86% | -0.46% |
| Lead (INR/1 kg) | 186.20 | 0.65% | -0.35% | 2.62% |
| Zinc (INR/1 kg) | 261.90 | 0.34% | 2.40% | 0.92% |
| Mentha Oil (INR/1 kg) | 933.00 | -0.66% | -1.56% | -5.26% |
| Baltic Dry Index | 1,521 | -2.06% | -9.95% | 17.36% |
| Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose. | | | | |




Term of the Day



Portfolio Management

Definition: Portfolio management is the process of selecting, monitoring, and managing a group of investments that meet the long-term financial goals and risk tolerance of an investor or institution.



Explanation

Imagine an investor with ₹10 lakhs to invest. Instead of putting all the money into one stock, they spread it across equities, bonds, and mutual funds. This mix is their portfolio. A portfolio manager helps decide how much to invest in each asset, when to buy or sell, and how to adjust the mix over time. The aim is to grow wealth steadily while minimizing losses, especially during market downturns. Good portfolio management adapts to changing market conditions and aligns with the investor’s financial goals and risk appetite.

| Mutual Fund Category Performance - Equity & Hybrid | | | | |
|---|---------|---------|--------|--------|
| Category | 1 Month | 6 Month | 1 Year | 3 Year |
| Large Cap Fund | 3.53 | 5.10 | 5.43 | 19.65 |
| Mid Cap Fund | 4.46 | 1.57 | 5.45 | 27.00 |
| Large & Mid Cap Fund | 3.98 | 3.07 | 5.98 | 23.75 |
| Small Cap Fund | 4.45 | -2.04 | 4.25 | 26.28 |
| Multi Cap Fund | 3.95 | 1.83 | 5.91 | 24.82 |
| Focused Fund | 3.59 | 3.42 | 5.44 | 20.91 |
| Value Fund | 3.16 | 2.25 | 3.45 | 24.96 |
| Contra Fund | 3.55 | 2.82 | 5.24 | 25.96 |
| ELSS | 3.97 | 2.80 | 4.87 | 22.47 |
| Equity Savings | 1.32 | 3.64 | 7.03 | 11.33 |
| Arbitrage Fund | 0.60 | 3.30 | 6.70 | 6.65 |
| Dividend Yield Fund | 2.84 | 2.76 | 2.91 | 23.97 |
| Aggressive Hybrid Fund | 2.86 | 3.99 | 6.50 | 18.44 |
| Balanced Advantage | 2.11 | 3.67 | 5.83 | 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. | | | | |

^[1]Data as on 26 Jun, 2025