

## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	6-May-25	1 Day	1 Week	1 Month
Nifty 50	24,379.60	-0.33%	0.18%	6.44%
Nifty 100	24,837.45	-0.69%	-0.13%	5.99%
Nifty 200	13,407.25	-0.95%	-0.46%	5.91%
Nifty 500	21,956.60	-1.07%	-0.70%	5.53%
Nifty Large Midcap 250	15,265.15	-1.35%	-0.98%	5.59%
Nifty Midcap 150	19,646.20	-2.01%	-1.81%	5.20%
Nifty Next 50	63,824.90	-2.42%	-1.64%	3.83%
Nifty Smallcap 250	15,181.45	-2.23%	-2.93%	2.71%

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

## Smart Beta Index

Index	6-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,183.80	-1.47%	-0.63%	8.35%
NIFTY 500 Value 50	13,319.25	-2.12%	-1.72%	3.51%
Nifty 200 Quality 30	19,794.95	-0.62%	-0.46%	6.54%
Nifty 50 Equal Weight	30,172.60	-0.62%	-0.33%	5.68%
NIFTY Alpha Low Volatility 30	26,192.50	-0.45%	-0.08%	6.44%
Nifty High Beta 50	3,374.45	-3.57%	-2.95%	2.75%
Nifty Low Volatility 50	24,501.65	-0.33%	-0.25%	5.75%
Nifty Midcap150 Momentum 50	56,896.65	-2.40%	-2.09%	6.08%
Nifty PSE	9,426.65	-2.18%	-2.16%	3.38%
Nifty SME Emerge	13,360.87	-2.36%	-3.47%	1.44%
Nifty 100 ESG	4,714.75	-0.89%	-0.27%	5.80%

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

## Sector Indices

Index	6-May-25	1 Day	1 Week	1 Month
Nifty Auto	22,737.60	0.17%	1.97%	10.41%
Nifty Bank	54,271.40	-1.18%	-2.02%	5.38%
Nifty Consumption	11,414.85	-0.30%	0.94%	6.26%
Nifty Financial	25,969.00	-0.75%	-0.86%	4.82%
Nifty FMCG	56,883.40	-0.09%	0.72%	5.67%
Nifty Healthcare	14,018.25	-0.56%	0.19%	4.40%
Nifty IT	35,869.20	-0.34%	-0.14%	7.04%
Nifty Media	1,508.00	-1.51%	-2.56%	1.31%
Nifty Metal	8,524.70	-0.88%	-0.96%	1.31%
Nifty MNC	26,979.10	-0.45%	0.26%	6.11%
Nifty Pharma	21,534.35	-1.11%	-0.66%	4.74%
Nifty Realty	855.60	-3.58%	-1.57%	3.95%
Nifty Energy	33,771.10	-2.35%	-1.94%	4.53%

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

## Nifty 50 Top 5 Gainers

Company	6-May-25	Prev_Day	% Change	1 Week
Hero Moto	3,872.60	3,767.60	2.79	0.52
Bharti Airtel	1,901.00	1,866.00	1.88	4.23
M&M	3,068.40	3,021.50	1.55	5.46
HUL	2,381.80	2,348.60	1.41	2.59
JSW Steel	967.50	955.50	1.26	-6.58

Source: NSE

## Nifty 50 Top 5 Losers

Company	6-May-25	Prev_Day	% Change	1 Week
Indian Oil	144.08	149	-3.02	6.11
BPCL	311.45	321	-2.99	-0.08
SBI Life Insurance Comp	1,726.00	1770	-2.48	-0.24
HDFC Standard Life Insurance Companv	722.60	739	-2.21	1.06
Cipla	1,511.40	1543	-2.04	-1.95

Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

Indian equity markets experienced losses as investors exercised caution ahead of the U.S. Federal Reserve's pivotal interest rate decision and amid increasing geopolitical tensions between India and Pakistan. Sentiment remained jittery after continued ceasefire violations along the Line of Control, following the terror attack in Jammu and Kashmir's Pahalgam.

Adani Energy Solutions announced a consolidated net profit increase of 78% YoY for the fourth quarter ending Mar 2025, amounting to Rs. 647 crore, while operational revenue rose by 35% YoY to Rs. 6,375 crore. Total expenses for the Jan-Mar 2025 quarter surged by 24% YoY, reaching Rs. 5,412 crore.

Bank of Baroda (BoB) announced a 3.3% increase in its standalone net profit for Q4FY25, reaching Rs. 5,048 crore, up from Rs. 4,886 crore in the corresponding quarter of the previous year. Despite an increase in interest income, net interest income experienced a decline of 6.6%.

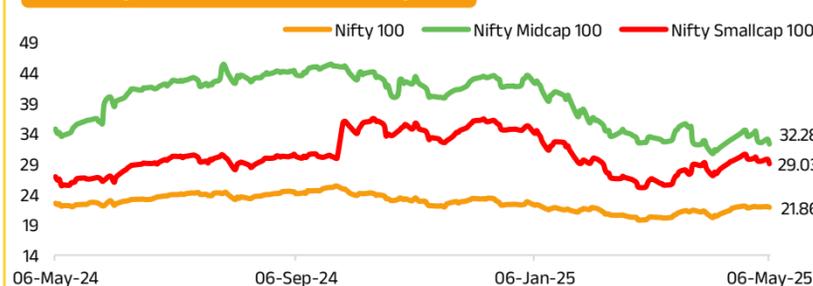
Polycab Ltd announced a profit of Rs. 727 crore for the quarter ending Mar 2025, representing a 33% increase compared to the Rs. 546 crore profit reported in the same quarter of the previous fiscal year. The company's revenue from operations in Q4 increased by 25%, reaching Rs. 6,985.7 crore, up from Rs. 5,591.9 crore a year earlier.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



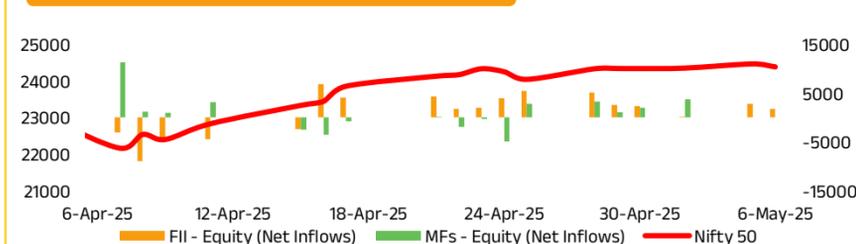
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	1796.13	4,776	8,999	-107,575
MF**	3698.27	3,698	20,742	132,874
DII	-1397.68	4,681	32,910	218,793

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

## F&O Trends

	Latest	Previous	Change %
Near Futures	24431.40	24553.70	-0.50%
Near Basis	51.80	92.55	-44.03%
Mid Futures	24535.40	24658.90	-0.50%
Mid Basis	155.80	197.75	-21.21%
Near Open Interest (Cr.)	1.35	1.35	0.06%
Mid Open Interest (Cr.)	0.17	0.17	3.23%
Rollover (%)	12.61	12.10	4.17%
Put Call Ratio (OI)	0.92	0.97	-4.43%
Put Call Ratio(Vol)	0.99	0.88	12.91%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3591	3058	28415
Index Options	1257781	1308023	550528
Stock Futures	20299	17494	374289
Stock Options	54935	56278	65140
Total	1336606	1384852	1018372

Source: NSE

## Global Equity Market

Global Indices	6-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3068.78	-0.77%	0.88%	10.70%
Nasdaq 100 (U.S.)	19791.35	-0.88%	1.26%	13.76%
FTSE (U.K.)	8597.42	0.01%	1.58%	6.73%
DAX Index (Germany)	23249.65	-0.41%	3.67%	12.63%
CAC 40 Index (France)	7696.92	-0.40%	1.87%	5.80%
SSE Composite (China)	3316.11	1.13%	0.90%	-0.77%
Nikkei (Japan) <sup>[1]</sup>	36830.69	1.04%	2.76%	9.03%
Kospi (South Korea) <sup>[1]</sup>	2559.79	0.12%	-0.22%	3.83%
HangSeng (Hong Kong)	22662.71	0.70%	2.97%	-0.82%
Strait Times (Singapore)	3860.41	0.19%	1.45%	0.90%
Ibovespa Sao Paulo (Brazil)	133515.82	0.02%	-1.17%	4.92%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8151.40	-0.08%	1.00%	6.31%
Jakarta Composite (Indonesia)	6898.20	0.97%	2.21%	NA
KLSE (Malaysia)	1536.80	-0.18%	1.40%	2.17%

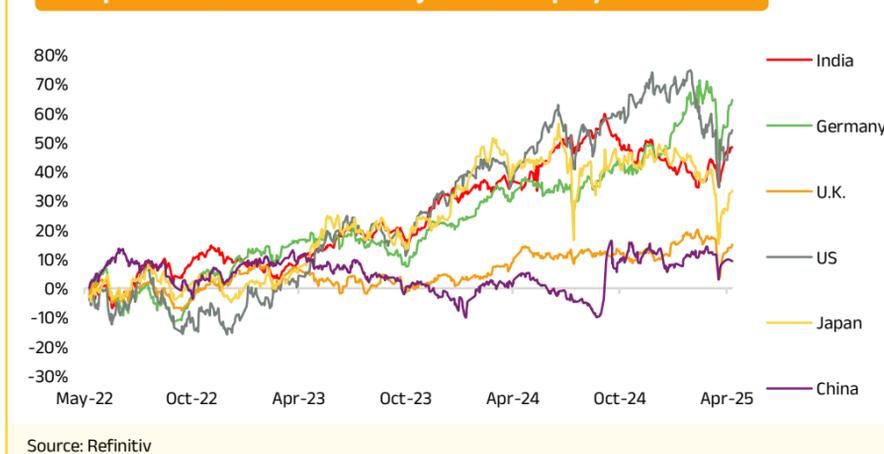
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

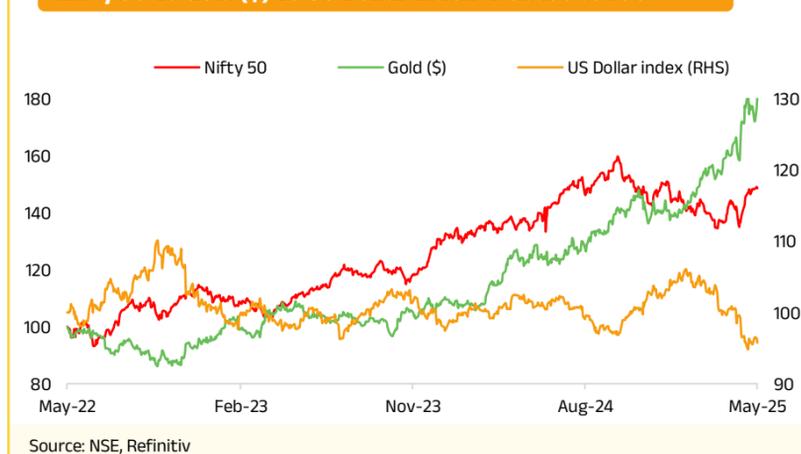
Commodity Prices	6-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,708	1.92%	1.20%	7.74%
Gold (\$/oz)	3,429.32	2.87%	3.41%	12.90%
Silver (INR/1 kg)	95,631	1.77%	-1.79%	3.49%
Silver (\$/oz)	33.24	2.28%	0.83%	12.47%
Brent Crude(\$/bbl)	62.95	2.16%	-6.09%	-8.87%
Crude Oil (INR/1 bbl)	4,812.00	-1.55%	-8.98%	-16.08%
NYMEX Crude(\$/bbl)	60.22	3.29%	-2.30%	-3.37%
Natural Gas (INR/1 mmbtu)	299.00	-1.77%	4.99%	-15.63%
Aluminium (INR/1 kg)	233.25	-0.11%	-1.58%	-1.56%
Copper (INR/1 kg)	852.15	0.97%	-0.58%	1.81%
Nickel (INR/1 kg)	1,343.30	0.31%	-0.53%	-1.88%
Lead (INR/1 kg)	182.65	-0.05%	-0.46%	1.11%
Zinc (INR/1 kg)	250.75	0.10%	-1.67%	-3.00%
Mentha Oil (INR/1 kg)	988.70	0.14%	-0.74%	-0.04%
Baltic Dry Index <sup>[1]</sup>	1,421	0.71%	1.65%	-4.57%

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



### 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	5.20	-3.00	7.04	16.12
Mid Cap Fund	4.72	-9.05	5.52	20.77
Large & Mid Cap Fund	4.81	-6.17	6.69	18.67
Small Cap Fund	2.68	-14.34	1.33	18.99
Multi Cap Fund	4.33	-7.94	4.95	19.56
Focused Fund	4.68	-5.53	6.32	16.73
Value Fund	4.24	-7.47	4.45	19.99
Contra Fund	5.02	-5.76	7.38	21.80
ELSS	4.86	-7.10	4.87	17.54
Equity Savings	2.08	1.29	7.74	10.00
Arbitrage Fund	0.52	3.46	7.11	6.54
Dividend Yield Fund	4.62	-6.82	4.78	19.30
Aggressive Hybrid Fund	4.21	-2.74	7.67	15.08
Balanced Advantage	3.28	-1.23	6.38	12.27

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.

<sup>[1]</sup> Data as on 02 May, 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.**