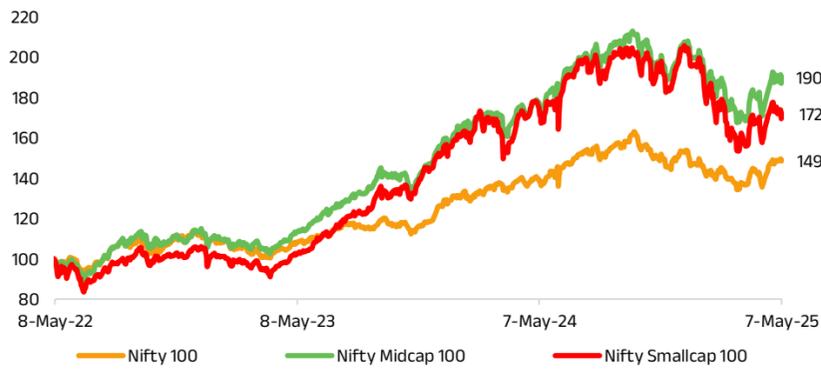


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

|                        | 7-May-25  | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|-------|--------|---------|
| Nifty 50               | 24,414.40 | 0.14% | 0.33%  | 10.17%  |
| Nifty 100              | 24,887.20 | 0.20% | 0.17%  | 9.74%   |
| Nifty 200              | 13,464.40 | 0.43% | 0.20%  | 9.98%   |
| Nifty 500              | 22,072.45 | 0.53% | 0.19%  | 9.78%   |
| Nifty Large Midcap 250 | 15,395.85 | 0.86% | 0.27%  | 10.25%  |
| Nifty Midcap 150       | 19,943.65 | 1.51% | 0.35%  | 10.77%  |
| Nifty Next 50          | 64,134.40 | 0.48% | -0.58% | 7.71%   |
| Nifty Smallcap 250     | 15,362.70 | 1.19% | 0.02%  | 8.26%   |

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

## Smart Beta Index

| Index                         | 7-May-25  | 1 Day  | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index   | 29,476.55 | 1.00%  | 0.70%  | 13.38%  |
| NIFTY 500 Value 50            | 13,459.65 | 1.05%  | 0.16%  | 8.48%   |
| Nifty 200 Quality 30          | 19,801.85 | 0.03%  | 0.05%  | 8.98%   |
| Nifty 50 Equal Weight         | 30,238.75 | 0.22%  | 0.10%  | 9.49%   |
| NIFTY Alpha Low Volatility 30 | 26,204.50 | 0.05%  | -0.10% | 8.90%   |
| Nifty High Beta 50            | 3,410.40  | 1.07%  | -0.65% | 8.46%   |
| Nifty Low Volatility 50       | 24,525.35 | 0.10%  | -0.37% | 8.59%   |
| Nifty Midcap150 Momentum 50   | 57,796.45 | 1.58%  | 0.13%  | 12.00%  |
| Nifty PSE                     | 9,503.05  | 0.81%  | -0.59% | 6.88%   |
| Nifty SME Emerge              | 13,345.46 | -0.12% | -1.81% | 5.65%   |
| Nifty 100 ESG                 | 4,733.15  | 0.39%  | 0.36%  | 9.67%   |

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

## Sector Indices

| Index             | 7-May-25  | 1 Day  | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto        | 23,114.10 | 1.66%  | 3.61%  | 16.65%  |
| Nifty Bank        | 54,610.90 | 0.63%  | -0.86% | 9.53%   |
| Nifty Consumption | 11,408.70 | -0.05% | 0.81%  | 9.17%   |
| Nifty Financial   | 26,165.65 | 0.76%  | 0.20%  | 9.44%   |
| Nifty FMCG        | 56,590.25 | -0.52% | 0.26%  | 6.29%   |
| Nifty Healthcare  | 13,968.80 | -0.35% | -0.60% | 7.05%   |
| Nifty IT          | 35,920.30 | 0.14%  | 0.35%  | 9.95%   |
| Nifty Media       | 1,524.00  | 1.06%  | 0.67%  | 6.58%   |
| Nifty Metal       | 8,608.05  | 0.98%  | 0.31%  | 9.71%   |
| Nifty MNC         | 27,115.35 | 0.51%  | 0.37%  | 8.35%   |
| Nifty Pharma      | 21,462.45 | -0.33% | -1.42% | 7.34%   |
| Nifty Realty      | 865.15    | 1.12%  | -2.34% | 11.46%  |
| Nifty Energy      | 34,048.05 | 0.82%  | -0.57% | 8.38%   |

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

## Nifty 50 Top 5 Gainers

| Company       | 7-May-25 | Prev_Day | % Change | 1 Week |
|---------------|----------|----------|----------|--------|
| Tata Motors   | 680.30   | 648.20   | 4.95     | 5.60   |
| Bajaj Finance | 8,986.50 | 8,797.50 | 2.15     | 4.08   |
| BPCL          | 316.90   | 311.45   | 1.75     | 2.21   |
| M&M           | 3,119.90 | 3,068.40 | 1.68     | 6.52   |
| Coal India    | 383.30   | 378.25   | 1.34     | -0.52  |

Source: NSE

## Nifty 50 Top 5 Losers

| Company      | 7-May-25 | Prev_Day | % Change | 1 Week |
|--------------|----------|----------|----------|--------|
| Asian Paints | 2,334.10 | 2418     | -3.47    | -3.78  |
| Sun Pharma   | 1,781.30 | 1819     | -2.08    | -2.78  |
| Bajaj Auto   | 7,849.00 | 7946     | -1.21    | -2.25  |
| Grasim Indus | 2,699.90 | 2729     | -1.06    | -1.37  |
| RIL          | 1,406.00 | 1421     | -1.05    | 0.07   |

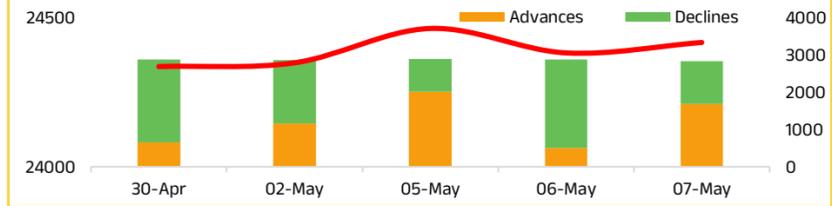
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

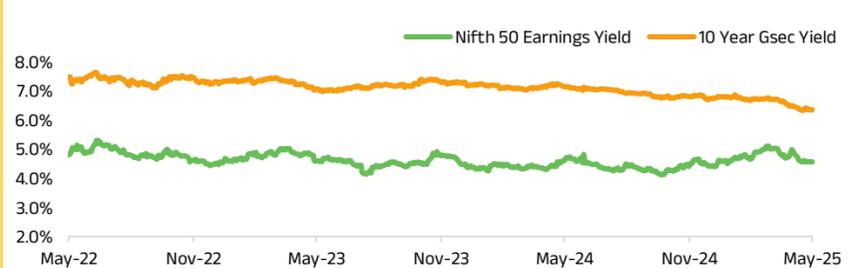
**Indian equity markets** traded within a narrow range but ended slightly higher due to optimism about upcoming U.S.-China trade talks. However, rising geopolitical tensions and caution ahead of the U.S. Federal Reserve's policy decision kept investors on edge. The primary driver of market resilience was sustained buying by foreign institutional investors.

**Dabur**, a prominent player in the FMCG sector, reported an 8% decrease in its consolidated net profit for the fourth quarter ending Mar 2025, amounting to Rs. 320 crore, compared to Rs. 350 crore in the same quarter of the previous year. The revenue from operations for the Q42025 was Rs. 2,830 crore, reflecting a slight increase of 0.6% from Rs. 2,815 crore in the corresponding quarter of the last financial year.

**RattanIndia** announced a significant decline in its consolidated net profit in Q42025, which fell to Rs. 125.94 crore. In the same period last year, the company reported a net profit of Rs. 10,665.75 crore, primarily due to an extraordinary gain of Rs. 10,635 crore in the final quarter of FY24.

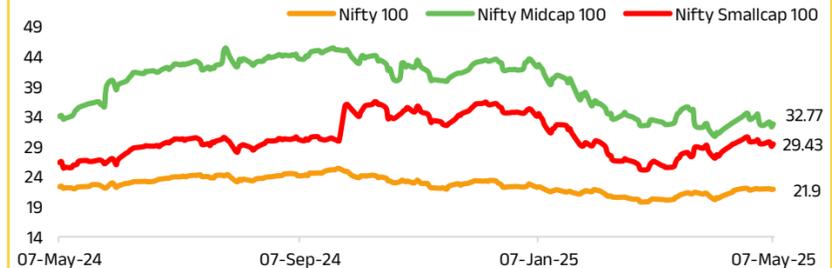
**Blue Star Ltd** announced a 21.47% rise in consolidated net profit, reaching Rs. 194 crore for the fourth quarter ending Mar 2025. This growth was primarily driven by its room air-conditioner and project segments. In comparison, the company reported a net profit of Rs. 159.71 crore during the same period last year, as stated in a regulatory filing by Blue Star Ltd.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



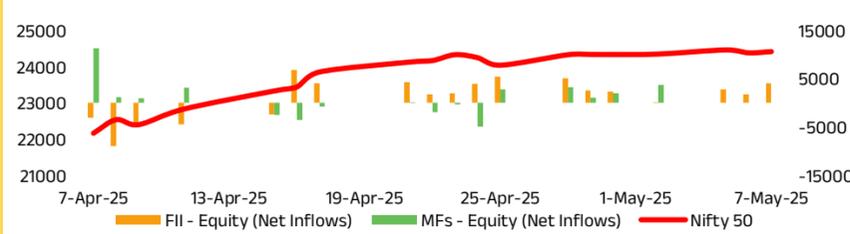
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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         | 4011.45 | 8,787 | 13,011 | -103,563 |
| MF**        | 3698.27 | 3,698 | 20,742 | 132,874  |
| DII         | 2378.49 | 7,060 | 35,288 | 221,172  |

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

## F&O Trends

|                          | Latest   | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures             | 24461.40 | 24431.40 | 0.12%    |
| Near Basis               | 47.00    | 51.80    | -9.27%   |
| Mid Futures              | 24570.30 | 24535.40 | 0.14%    |
| Mid Basis                | 155.90   | 155.80   | 0.06%    |
| Near Open Interest (Cr.) | 1.32     | 1.35     | -2.72%   |
| Mid Open Interest (Cr.)  | 0.17     | 0.17     | 1.60%    |
| Rollover (%)             | 13.23    | 12.61    | 4.95%    |
| Put Call Ratio (OI)      | 0.97     | 0.92     | 4.91%    |
| Put Call Ratio(Vol)      | 0.82     | 0.99     | -17.29%  |

Source: NSE

## FII Derivative Trade Statistics

|               | Buy     | Sell    | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 3485    | 2933    | 29413     |
| Index Options | 2084695 | 2056778 | 513551    |
| Stock Futures | 21636   | 20876   | 371028    |
| Stock Options | 58976   | 60493   | 69488     |
| Total         | 2168793 | 2141080 | 983481    |

Source: NSE

## Global Equity Market

| Global Indices                | 7-May-25  | 1 Day  | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.)     | 3081.82   | 0.42%  | 1.19%  | 11.48%  |
| Nasdaq 100 (U.S.)             | 19867.97  | 0.39%  | 1.52%  | 13.98%  |
| FTSE (U.K.)                   | 8559.33   | -0.44% | 0.76%  | 11.13%  |
| DAX Index (Germany)           | 23115.96  | -0.58% | 2.75%  | 16.81%  |
| CAC 40 Index (France)         | 7626.84   | -0.91% | 0.43%  | 10.10%  |
| SSE Composite (China)         | 3342.67   | 0.80%  | 1.94%  | 7.95%   |
| Nikkei (Japan)                | 36779.66  | -0.14% | 2.04%  | 18.12%  |
| Kospi (South Korea)           | 2573.80   | 0.55%  | 0.67%  | 10.55%  |
| HangSeng (Hong Kong)          | 22691.88  | 0.13%  | 2.59%  | 14.44%  |
| Strait Times (Singapore)      | 3865.37   | 0.13%  | 0.86%  | 9.18%   |
| Ibovespa Sao Paulo (Brazil)   | 133397.52 | -0.09% | -1.24% | 6.22%   |
| RTS Index (Russia)            | NA        | NA     | NA     | NA      |
| S&P/ASX 200 (Australia)       | 8178.30   | 0.33%  | 0.64%  | 11.37%  |
| Jakarta Composite (Indonesia) | 6926.23   | 0.41%  | 2.36%  | NA      |
| KLSE (Malaysia)               | 1549.90   | 0.85%  | 0.63%  | 7.35%   |

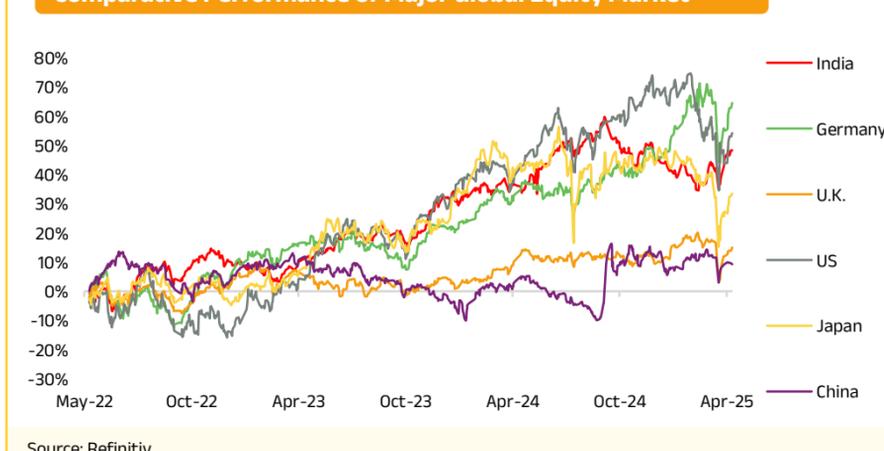
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

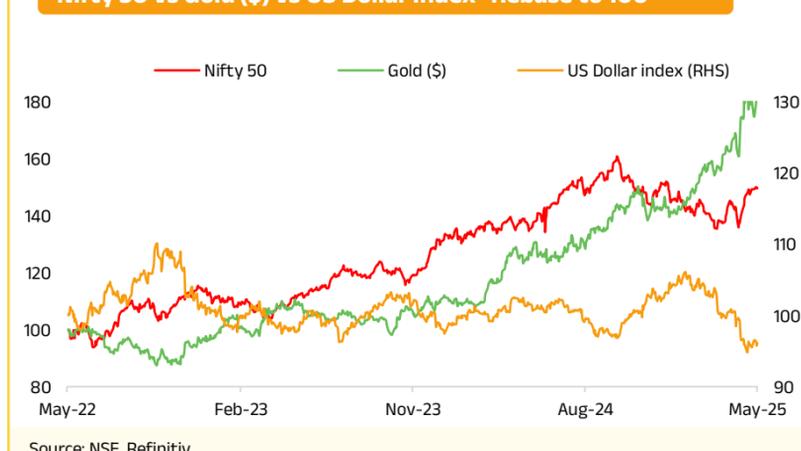
| Commodity Prices                | 7-May-25 | 1 Day  | 1 Week | 1 Month |
|---------------------------------|----------|--------|--------|---------|
| Gold (INR/10 gm)                | 97,192   | 0.50%  | 3.48%  | 10.05%  |
| Gold (\$/oz)                    | 3,364.32 | -1.90% | 2.33%  | 12.80%  |
| Silver (INR/1 kg)               | 95,487   | -0.15% | 1.61%  | 6.18%   |
| Silver (\$/oz)                  | 32.47    | -2.32% | -0.37% | 7.80%   |
| Brent Crude(\$/bbl)             | 61.80    | -1.83% | -5.29% | -8.59%  |
| Crude Oil (INR/1 bbl)           | 4,996.00 | 3.82%  | -2.95% | -5.43%  |
| NYMEX Crude(\$/bbl)             | 59.22    | -1.66% | -0.22% | -2.84%  |
| Natural Gas (INR/1 mmbtu)       | 292.80   | -2.07% | 1.49%  | -10.46% |
| Aluminium (INR/1 kg)            | 232.85   | -0.17% | -0.83% | -0.09%  |
| Copper (INR/1 kg)               | 850.40   | -0.21% | 1.38%  | 4.81%   |
| Nickel (INR/1 kg)               | 1,345.80 | 0.19%  | -0.42% | 4.80%   |
| Lead (INR/1 kg)                 | 183.85   | 0.66%  | 1.10%  | 1.27%   |
| Zinc (INR/1 kg)                 | 250.05   | -0.28% | -0.71% | -1.46%  |
| Mentha Oil (INR/1 kg)           | 989.90   | 0.12%  | -0.55% | 0.59%   |
| Baltic Dry Index <sup>[1]</sup> | 1,406    | -1.06% | 1.44%  | 0.36%   |

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



### Fungibility

Definition: Fungibility refers to the quality of being able to substitute or interchange one unit of a financial instrument for another unit of the same financial instrument. However, in trading, a financial instrument is said to be fungible if buy or sell of the same financial instrument can happen on a different market with the same end result.



### Explanation

There are many financial instruments which qualify to be considered as fungible. Some of those financial instruments include individual stock, gold, silver, currencies etc. These fungible financial instruments are generally used in arbitrage trades as price difference often arises due to difference in location.

## Mutual Fund Category Performance - Equity & Hybrid

| Category               | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund         | 8.76    | -1.69   | 8.42   | 16.24  |
| Mid Cap Fund           | 9.86    | -7.33   | 8.59   | 21.24  |
| Large & Mid Cap Fund   | 9.34    | -4.75   | 8.86   | 18.94  |
| Small Cap Fund         | 7.74    | -12.98  | 3.84   | 19.41  |
| Multi Cap Fund         | 8.82    | -6.47   | 7.22   | 19.85  |
| Focused Fund           | 8.89    | -4.24   | 8.06   | 16.93  |
| Value Fund             | 8.41    | -6.24   | 6.28   | 20.18  |
| Contra Fund            | 8.52    | -4.95   | 8.98   | 21.85  |
| ELSS                   | 9.12    | -5.71   | 6.79   | 17.79  |
| Equity Savings         | 3.15    | 1.66    | 8.19   | 10.03  |
| Arbitrage Fund         | 0.53    | 3.38    | 6.99   | 6.52   |
| Dividend Yield Fund    | 7.99    | -5.84   | 6.10   | 19.35  |
| Aggressive Hybrid Fund | 7.24    | -1.74   | 8.98   | 15.21  |
| Balanced Advantage     | 5.42    | -0.51   | 7.35   | 12.37  |

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 06 May, 2025

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