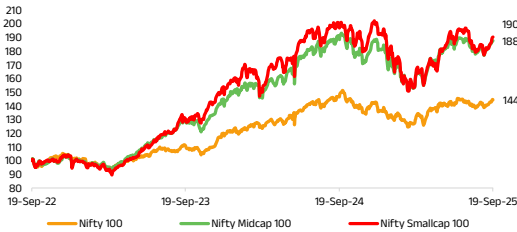


Broad Indices Historical Movement



Source: NSE

Broad Indices

	19-Sep-25	1 Day	1 Week	1 Month
Nifty 50	25,327.05	-0.38%	0.85%	1.39%
Nifty 100	26,025.85	-0.21%	1.09%	1.61%
Nifty 200	14,174.85	-0.17%	1.16%	1.76%
Nifty 500	23,486.65	-0.14%	1.28%	1.82%
Nifty Large Midcap 100	16,503.05	-0.10%	1.32%	1.82%
Nifty Midcap 150	21,900.60	0.01%	1.55%	2.02%
Nifty Next 50	69,736.60	0.58%	2.26%	2.69%
Nifty Smallcap 250	17,505.90	0.14%	2.11%	2.94%

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

Smart Beta Index

Index	19-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,945.95	-0.42%	0.61%	0.85%
NIFTY 500 Value 50	14,536.50	0.45%	2.47%	3.24%
Nifty 200 Quality 30	21,172.40	-0.34%	0.30%	3.18%
Nifty 50 Equal Weight	32,459.00	-0.10%	0.92%	2.34%
NIFTY Alpha Low Volatility 30	26,928.30	-0.25%	0.48%	1.51%
Nifty High Beta 50	3,796.70	1.43%	3.18%	4.38%
Nifty Low Volatility 50	25,427.35	-0.25%	0.45%	1.38%
Nifty Midcap150 Momentum 50	61,479.50	-0.42%	0.65%	-0.25%
Nifty PSE	9,869.85	0.31%	2.19%	3.21%
Nifty SME Emerge	15,635.64	0.27%	1.15%	3.29%
Nifty 100 ESG	5,053.80	-0.09%	1.19%	2.16%

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

Sector Indices

Index	19-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	27,219.55	-0.40%	1.31%	6.92%
Nifty Bank	55,458.85	-0.48%	1.19%	-0.73%
Nifty Consumption	12,462.65	-0.18%	0.70%	2.24%
Nifty Financial	26,527.60	-0.64%	0.62%	-0.24%
Nifty FMCG	56,273.05	-0.44%	-0.50%	0.69%
Nifty Healthcare	14,881.05	0.17%	0.90%	1.75%
Nifty IT	36,578.25	-0.47%	1.29%	5.24%
Nifty Media	1,619.45	-0.50%	-0.10%	-3.11%
Nifty Metal	9,989.90	0.35%	1.08%	5.63%
Nifty MNC	30,502.10	-0.27%	0.85%	3.55%
Nifty Pharma	22,686.60	0.50%	1.55%	2.81%
Nifty Realty	923.50	0.55%	4.43%	2.12%
Nifty Energy	35,745.75	0.86%	2.31%	2.81%

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

Nifty 50 Top 5 Gainers

Company	19-Sep-25	Prev_Day	% Change	1 Week
Divi's Lab	6,200.00	6,112.00	1.44	2.88
IndusInd Bank	744.40	735.45	1.22	0.53
BPCL	329.55	325.70	1.18	3.63
Bharti Airtel	1,962.40	1,941.10	1.10	3.14
SBI Life Insurance Company Lin	1,841.70	1,821.80	1.09	0.63

Source: NSE

Nifty 50 Top 5 Losers

Company	19-Sep-25	Prev_Day	% Change	1 Week
HCL Tech	1,467.40	1494	-1.77	0.01
M&M	3,592.10	3642	-1.38	0.96
ICICI Bank	1,402.20	1422	-1.37	-1.09
Titan Industries Limited	3,467.20	3511	-1.26	-2.93
Kotak Bank	2,031.00	2055	-1.15	2.98

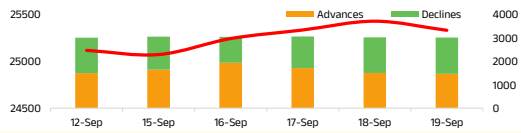
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

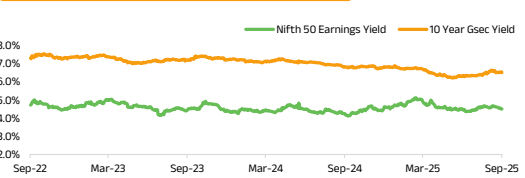
Indian equity markets snapped their three-day winning streak as investors booked profits, following a rally driven by GST reforms, encouraging progress in India-U.S. trade negotiations, and the Federal Reserve's first rate cut of the year.

Hyundai Motor Company announced that electric vehicles (EVs) will account for approximately 60% of its projected global sales of 5.55 million units by 2030, as the South Korean automaker committed to expanding its manufacturing footprint in India.

Amazon India plans to add over 200 new micro-fulfilment centres, or dark stores, by the end of 2025, bringing the total to more than 300, as it invests Rs. 2,000 crore to expand its storage and processing capacities.

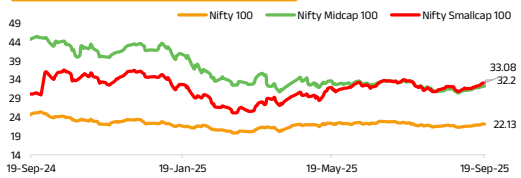
JSW Energy's renewable arm, JSW Neo Energy, has agreed to acquire Tidong Power Generation from Norway's Statkraft IH Holding in a deal valued at Rs. 1,728 crore. The acquisition will add a 150-megawatt (MW) hydroelectric project in Himachal Pradesh to the Indian power producer's portfolio, accelerating its clean energy expansion.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



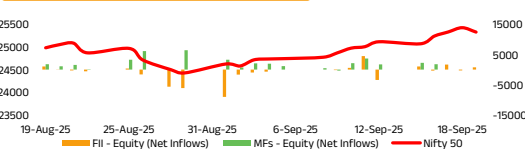
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	YTD	INR Cr.
FII	785.11	-7,945	-60,679	-1,38,579	
MF**	1782.22	20,818	1,38,371	3,69,439	
DII	2105.22	38,325	1,94,092	5,42,568	

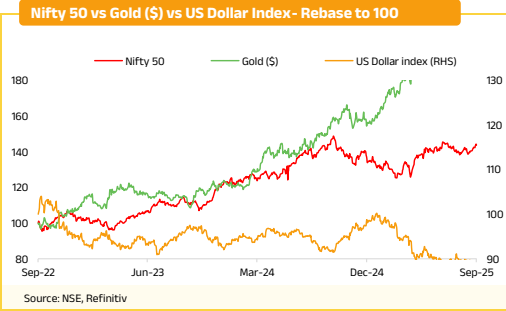
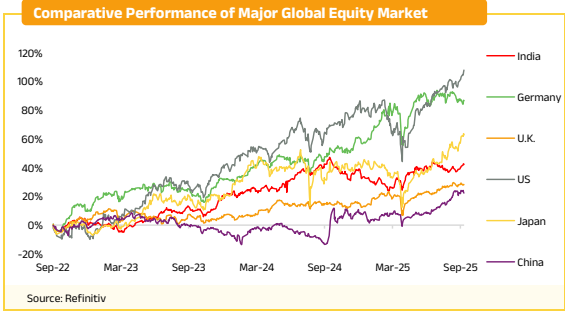
Source: SEBI, NSDL,**As on 16th Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25411.20	25510.90	-0.39%
Near Basis	84.15	87.30	-3.61%
Mid Futures	25534.50	25629.10	-0.37%
Mid Basis	207.45	205.50	0.95%
Near Open Interest (Cr.)	1.50	1.55	-3.30%
Mid Open Interest (Cr.)	0.23	0.19	19.08%
Rollover (%)	15.65	13.44	16.50%
Put Call Ratio (OI)	0.94	1.16	-18.75%
Put Call Ratio(Vol)	1.12	1.08	3.03%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	4211	2857	38141
Index Options	1874663	1872564	352971
Stock Futures	17920	17698	396719
Stock Options	31710	31215	31772
Total	1928504	1924333	819603
Source: NSE			

Global Equity Market				
Global Indices	19-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3649.25	0.44%	1.23%	4.12%
Nasdaq 100 (U.S.)	24626.25	0.70%	2.22%	5.31%
FTSE (U.K.)	9216.67	-0.12%	-0.72%	0.30%
DAX Index (Germany)	23639.41	-0.15%	-0.25%	-3.21%
CAC 40 Index (France)	7853.59	-0.01%	0.36%	-1.57%
SSE Composite (China)	3820.09	-0.30%	-1.30%	2.49%
Nikkei (Japan)	45045.81	-0.57%	0.62%	3.44%
Kospi (South Korea)	3445.24	-0.46%	1.46%	9.32%
HangSeng (Hong Kong)	26545.10	0.00%	0.59%	5.66%
Strait Times (Singapore)	4302.71	-0.23%	-0.96%	2.05%
Ibovespa Sao Paulo (Brazil)	145865.11	0.25%	2.53%	8.50%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8773.50	0.32%	-1.03%	-1.38%
Jakarta Composite (Indonesia)	8051.12	0.53%	2.51%	2.39%
KLSE (Malaysia)	1598.23	-0.04%	-0.12%	0.50%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	19-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,09,388	-0.28%	0.00%	10.83%
Gold (\$/oz)	3,683.73	1.09%	1.13%	11.12%
Silver (INR/1 kg)	1,27,953	0.81%	-0.06%	12.81%
Silver (\$/oz)	43.08	3.06%	2.16%	15.28%
Brent Crude(\$/bbl)	67.34	-4.47%	-1.45%	-1.26%
Crude Oil (INR/1 bbl)	5,602.00	-0.34%	1.76%	1.05%
NYMEX Crude(\$/bbl)	62.87	-1.40%	0.00%	-0.65%
Natural Gas (INR/1 mmbtu)	259.00	-4.78%	0.00%	2.53%
Aluminium (INR/1 kg)	259.70	-0.50%	-0.61%	3.61%
Copper (INR/1 kg)	908.20	-0.22%	-1.20%	2.92%
Nickel (INR/1 kg)	1,349.00	0.43%	-0.41%	1.46%
Lead (INR/1 kg)	184.50	-0.62%	0.63%	-1.02%
Zinc (INR/1 kg)	280.00	-0.32%	-1.50%	4.19%
Mentha Oil (INR/1 kg)	1,034.60	0.56%	1.68%	2.18%
Baltic Dry Index	2,203	-0.09%	3.62%	12.17%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Asset Allocation

Definition: Asset allocation is the strategy of dividing investments among different asset classes such as equities, bonds, real estate, and cash to balance risk and reward.



Explanation

he goal of asset allocation is to optimize returns while managing risk based on an investor's goals, risk tolerance, and investment horizon. For example, a young investor may prefer a higher allocation to equities for growth, while a retiree may favor bonds for stability and income.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.59	11.66	-0.67	14.95
Flexi Cap Fund	2.17	13.69	-0.98	16.64
Mid Cap Fund	1.88	16.62	-0.33	21.07
Large & Mid Cap Fund	1.79	13.97	-0.38	18.51
Small Cap Fund	2.57	17.15	-2.64	20.54
Multi Cap Fund	2.09	14.61	-0.25	19.17
Focused Fund	1.95	12.84	-1.50	16.21
Value Fund	2.00	12.19	-2.52	19.38
Contra Fund	1.77	12.92	-1.42	20.68
ELSS	1.87	13.90	-1.27	17.30
Equity Savings	0.96	6.51	4.86	9.98
Arbitrage Fund	0.36	2.99	6.35	6.73
Dividend Yield Fund	2.17	11.13	-3.34	19.86
Aggressive Hybrid Fund	1.58	10.87	1.29	14.71
Balanced Advantage	1.23	8.16	1.70	11.97
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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