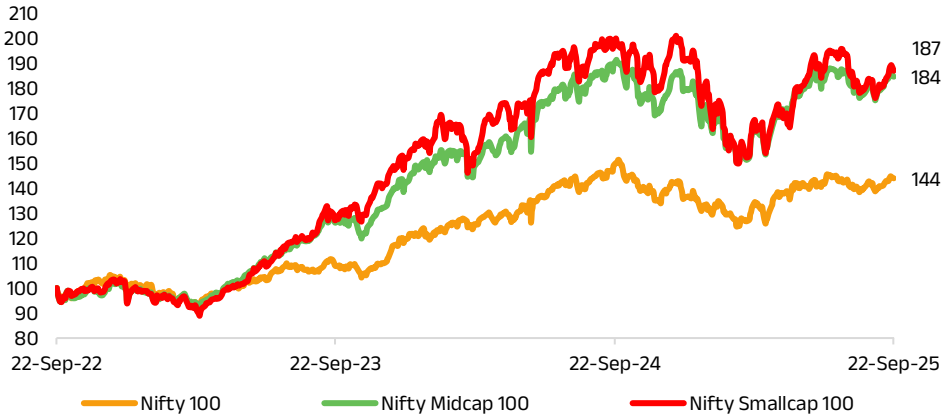


Broad Indices Historical Movement



Source: NSE

Broad Indices

	22-Sep-25	1 Day	1 Week	1 Month
Nifty 50	25,202.35	-0.49%	0.53%	1.34%
Nifty 100	25,934.50	-0.35%	0.78%	1.72%
Nifty 200	14,117.40	-0.41%	0.71%	1.74%
Nifty 500	23,381.45	-0.45%	0.71%	1.70%
Nifty Large Midcap 250	16,427.65	-0.46%	0.67%	1.65%
Nifty Midcap 150	21,777.50	-0.56%	0.55%	1.58%
Nifty Next 50	69,962.30	0.32%	1.98%	3.59%
Nifty Smallcap 250	17,345.90	-0.91%	0.53%	1.73%

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

Smart Beta Index

Index	22-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,915.55	-0.10%	0.38%	0.96%
NIFTY 500 Value 50	14,469.65	-0.46%	1.86%	4.30%
Nifty 200 Quality 30	20,988.35	-0.87%	-0.35%	2.36%
Nifty 50 Equal Weight	32,358.25	-0.31%	0.91%	2.64%
NIFTY Alpha Low Volatility 30	26,795.10	-0.49%	0.13%	1.09%
Nifty High Beta 50	3,844.75	1.27%	3.71%	6.91%
Nifty Low Volatility 50	25,298.15	-0.51%	0.09%	0.88%
Nifty Midcap150 Momentum 50	61,159.65	-0.52%	-0.14%	-0.74%
Nifty PSE	9,841.40	-0.29%	1.58%	3.91%
Nifty SME Emerge	15,560.61	-0.48%	0.94%	1.58%
Nifty 100 ESG	5,041.35	-0.25%	1.02%	2.12%

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

Sector Indices

Index	22-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	27,154.30	-0.24%	1.47%	7.20%
Nifty Bank	55,284.75	-0.31%	0.72%	0.25%
Nifty Consumption	12,493.15	0.24%	1.18%	2.43%
Nifty Financial	26,528.40	0.00%	0.51%	0.80%
Nifty FMCG	56,006.75	-0.47%	-0.96%	0.48%
Nifty Healthcare	14,721.55	-1.07%	0.37%	-0.12%
Nifty IT	35,500.15	-2.95%	-1.12%	0.17%
Nifty Media	1,627.30	0.48%	0.84%	-1.61%
Nifty Metal	10,029.10	0.39%	1.40%	6.97%
Nifty MNC	30,391.40	-0.36%	0.32%	3.41%
Nifty Pharma	22,365.75	-1.41%	0.75%	0.45%
Nifty Realty	921.55	-0.21%	1.76%	1.31%
Nifty Energy	35,992.65	0.69%	2.46%	4.30%

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

Nifty 50 Top 5 Gainers

Company	22-Sep-25	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,444.20	1,427.80	1.15	3.51
Ultratech Cem	12,650.00	12,508.00	1.14	1.73
Bajaj Auto	9,054.50	8,971.50	0.93	0.33
SBI Life Insurance Company Ltd	1,857.70	1,841.70	0.87	1.95
Axis Bank	1,144.40	1,135.90	0.75	3.62

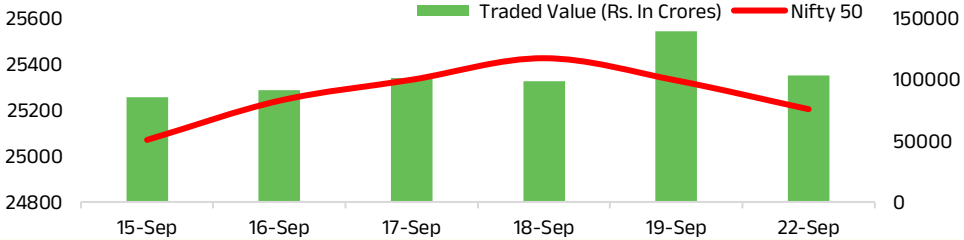
Source: NSE

Nifty 50 Top 5 Losers

Company	22-Sep-25	Prev_Day	% Change	1 Week
Tech Mahindra	1,505.40	1554	-3.11	-0.95
TCS	3,073.80	3169	-3.01	-1.22
Infosys	1,499.50	1540	-2.64	-0.59
Wipro	250.33	256	-2.17	-0.38
Cipla	1,542.20	1576	-2.13	-0.39

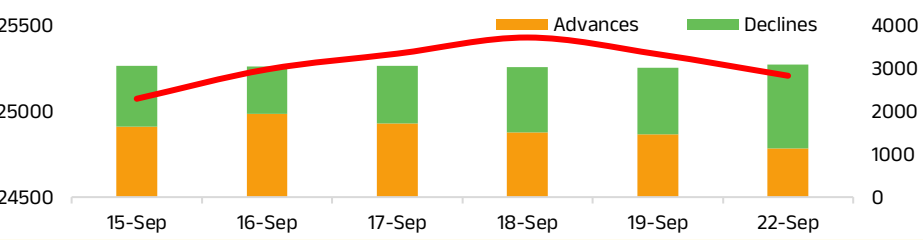
Source: NSE

Nifty 50 vs NSE Trading Volume





Source: NSE


Nifty 50 vs Advances & Declines




Source: NSE

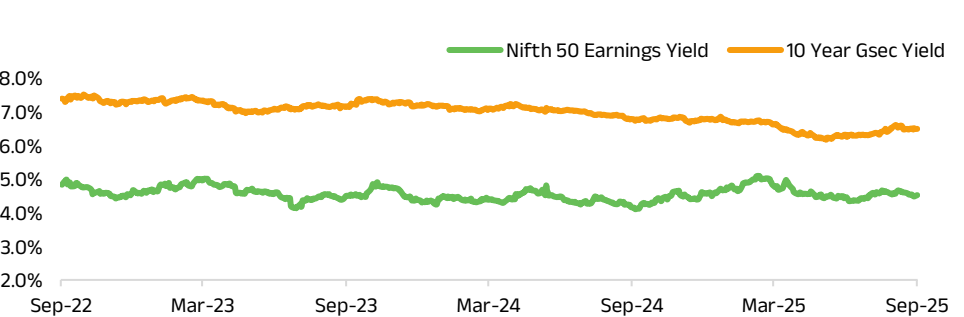
 Indian equity markets declined, led by losses in IT stocks, after the U.S. administration announced sweeping changes to the H-1B visa regime, including a steep \$100,000 fee for new applications.

 NBCC (India) Ltd has signed an initial agreement with HUDCO to develop projects worth Rs. 117 crore. In a statement, NBCC said it has signed a Memorandum of Understanding (MoU) with the Housing and Urban Development Corporation Ltd (HUDCO) to “execute transformative development projects in Panchkula, Kaushambi, Ahmedabad, and New Delhi.”

 Ultra Gas & Energy Ltd (UGEL), an Essar Group company, will invest Rs. 900 crore to expand its network of liquefied natural gas (LNG) retail outlets to 100 across India, capitalizing on the growing shift toward clean fuels in long-haul transportation.

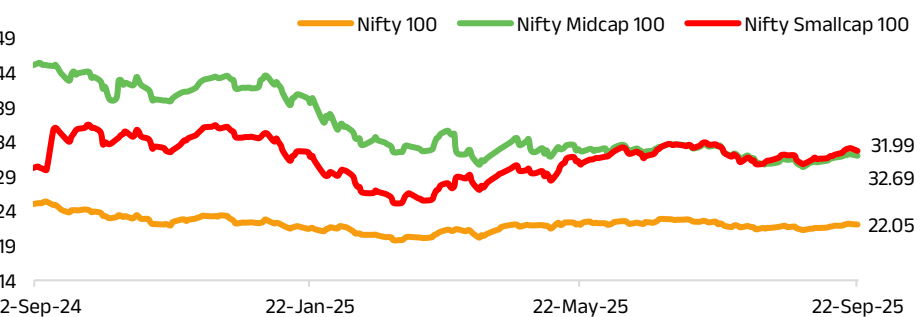
 Inox Solar announced that its subsidiary, Inox Clean Energy, has commenced production at its solar module manufacturing facility in Bavla, Ahmedabad, Gujarat.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



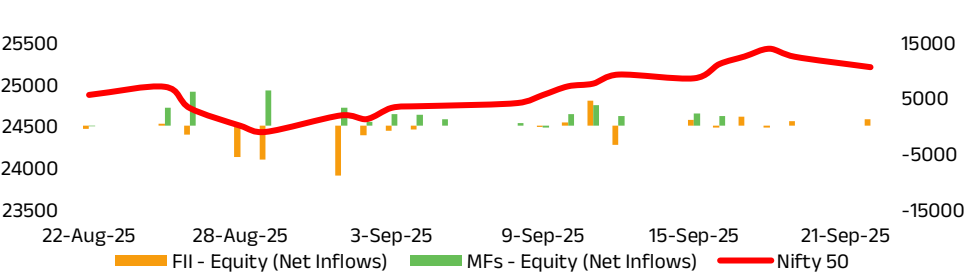
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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
FII	1128.39	-6,816	-59,550	-1,37,451
MF**	1782.22	20,818	1,38,371	3,69,439
DII	2582.63	40,907	1,96,675	5,45,150

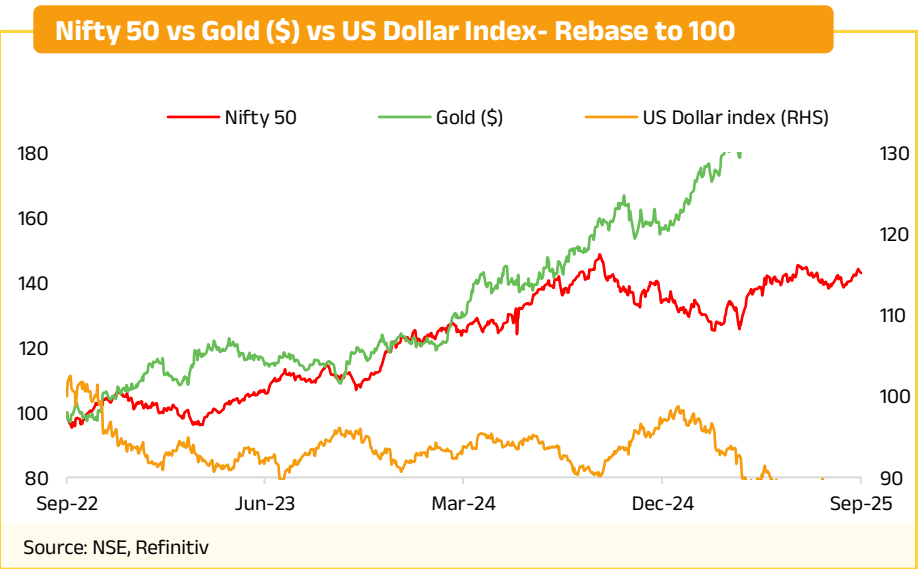
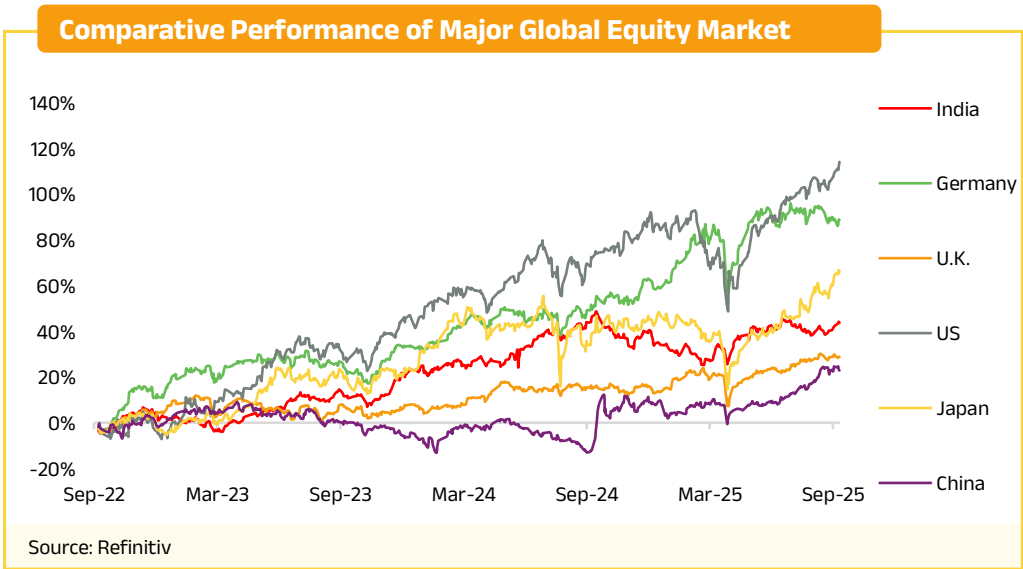
Source: SEBI, NSDL;\*\*As on 16th Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	25277.70	25411.20	-0.53%
Near Basis	75.35	84.15	-10.46%
Mid Futures	25403.40	25534.50	-0.51%
Mid Basis	201.05	207.45	-3.09%
Near Open Interest (Cr.)	1.48	1.50	-1.66%
Mid Open Interest (Cr.)	0.26	0.23	13.78%
Rollover (%)	17.67	15.65	12.90%
Put Call Ratio (OI)	0.72	0.94	-23.02%
Put Call Ratio(Vol)	1.03	1.12	-8.10%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	3141	3754	37713
Index Options	1399969	1401924	405295
Stock Futures	20623	21282	400011
Stock Options	30181	30629	32338
Total	1453913	1457589	875358
Source: NSE			

Global Equity Market				
Global Indices	22-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3663.52	0.39%	1.17%	3.51%
Nasdaq 100 (U.S.)	24761.07	0.55%	1.92%	5.37%
FTSE (U.K.)	9226.68	0.11%	-0.54%	-1.02%
DAX Index (Germany)	23527.05	-0.48%	-0.93%	-3.43%
CAC 40 Index (France)	7830.11	-0.30%	-0.85%	-1.75%
SSE Composite (China)	3828.58	0.22%	-0.83%	0.07%
Nikkei (Japan)	45493.66	0.99%	1.62%	6.71%
Kospi (South Korea)	3468.65	0.68%	1.80%	9.46%
HangSeng (Hong Kong)	26344.14	-0.76%	-0.39%	3.97%
Strait Times (Singapore)	4297.37	-0.12%	-0.95%	1.04%
Ibovespa Sao Paulo (Brazil)	145109.25	-0.52%	1.09%	5.18%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8810.90	0.43%	-0.48%	-1.75%
Jakarta Composite (Indonesia)	8040.04	-0.14%	1.30%	2.31%
KLSE (Malaysia)	1603.34	0.32%	0.20%	0.37%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	22-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,11,599	2.02%	2.32%	12.77%
Gold (\$/oz)	3,746.21	1.70%	1.83%	11.11%
Silver (INR/1 kg)	1,32,681	3.70%	4.00%	16.66%
Silver (\$/oz)	44.08	2.32%	3.21%	13.54%
Brent Crude(\$/bbl)	67.13	-0.31%	-0.83%	-4.00%
Crude Oil (INR/1 bbl)	5,535.00	-1.20%	0.02%	0.18%
NYMEX Crude(\$/bbl)	62.84	-0.05%	-1.05%	-1.63%
Natural Gas (INR/1 mmbtu)	255.00	-1.54%	-1.77%	3.74%
Aluminium (INR/1 kg)	260.00	0.12%	0.00%	2.97%
Copper (INR/1 kg)	912.30	0.45%	-0.46%	3.71%
Nickel (INR/1 kg)	1,346.30	-0.20%	-0.67%	1.72%
Lead (INR/1 kg)	185.30	0.43%	-0.48%	-0.30%
Zinc (INR/1 kg)	283.15	1.12%	-0.12%	4.29%
Mentha Oil (INR/1 kg)	1,026.40	-0.79%	-1.58%	2.14%
Baltic Dry Index	2,172	-1.41%	0.88%	11.73%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Sector Rotation

Definition: Sector rotation is the movement of investment capital from one industry sector to another based on economic cycles.



Explanation

Investors rotate into sectors expected to outperform in the current phase of the business cycle, such as moving from defensive to cyclical stocks during recovery.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.34	9.15	-2.47	14.74
Flexi Cap Fund	1.69	11.00	-2.75	16.31
Mid Cap Fund	1.05	13.80	-2.13	20.35
Large & Mid Cap Fund	1.42	11.33	-2.08	18.11
Small Cap Fund	1.78	13.64	-4.16	19.87
Multi Cap Fund	1.45	11.88	-1.99	18.80
Focused Fund	1.50	10.27	-3.19	15.93
Value Fund	1.80	9.55	-3.96	19.11
Contra Fund	1.23	10.08	-3.19	20.33
ELSS	1.49	11.17	-2.94	16.92
Equity Savings	0.72	5.64	4.21	9.94
Arbitrage Fund	0.27	2.92	6.22	6.76
Dividend Yield Fund	1.90	8.55	-4.70	19.59
Aggressive Hybrid Fund	1.34	8.81	-0.05	14.51
Balanced Advantage	0.97	6.67	0.63	11.80
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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