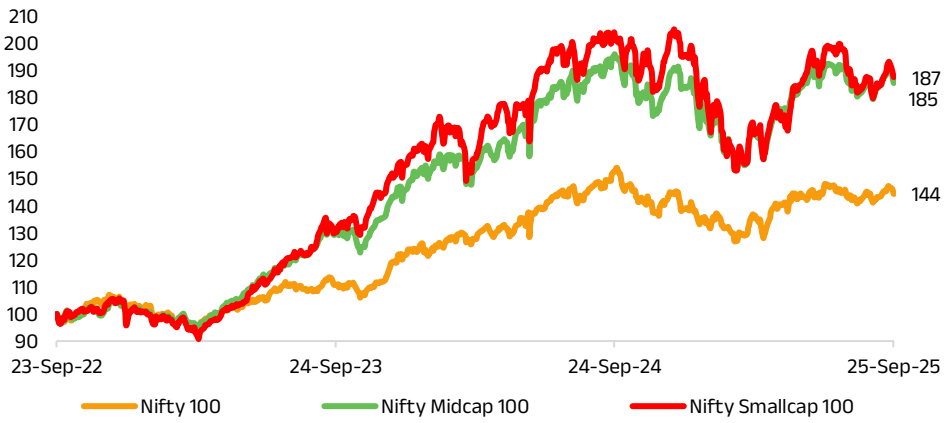


Broad Indices Historical Movement



Source: NSE

Broad Indices

	25-Sep-25	1 Day	1 Week	1 Month
Nifty 50	24,890.85	-0.66%	-2.10%	-0.31%
Nifty 100	25,562.00	-0.68%	-1.99%	-0.11%
Nifty 200	13,902.35	-0.67%	-2.09%	-0.13%
Nifty 500	23,022.40	-0.67%	-2.11%	-0.13%
Nifty Large Midcap 250	16,160.30	-0.67%	-2.18%	-0.17%
Nifty Midcap 150	21,381.50	-0.66%	-2.36%	-0.24%
Nifty Next 50	68,293.65	-0.75%	-1.50%	0.86%
Nifty Smallcap 250	17,048.60	-0.66%	-2.48%	-0.07%

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

Smart Beta Index

Index	25-Sep-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,313.05	-0.72%	-2.46%	-0.97%
NIFTY 500 Value 50	14,373.05	-0.59%	-0.68%	3.11%
Nifty 200 Quality 30	20,658.20	-0.42%	-2.76%	0.13%
Nifty 50 Equal Weight	31,933.45	-0.77%	-1.72%	0.86%
NIFTY Alpha Low Volatility 30	26,307.20	-0.83%	-2.55%	-1.08%
Nifty High Beta 50	3,752.35	-0.52%	0.25%	4.08%
Nifty Low Volatility 50	24,904.15	-0.83%	-2.30%	-1.00%
Nifty Midcap150 Momentum 50	60,003.80	-0.64%	-2.81%	-2.46%
Nifty PSE	9,779.80	-0.51%	-0.61%	3.31%
Nifty SME Emerge	15,442.03	-0.67%	-0.98%	1.62%
Nifty 100 ESG	4,947.90	-0.84%	-2.18%	-0.29%

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

Sector Indices

Index	25-Sep-25	1 Day	1 Week	1 Month
Nifty Auto	26,758.50	-0.92%	-2.09%	5.25%
Nifty Bank	54,976.20	-0.26%	-1.35%	-0.30%
Nifty Consumption	12,243.30	-0.61%	-1.94%	0.25%
Nifty Financial	26,247.40	-0.53%	-1.69%	-0.23%
Nifty FMCG	55,108.00	-0.49%	-2.50%	-1.03%
Nifty Healthcare	14,452.75	-0.77%	-2.71%	-2.05%
Nifty IT	34,548.30	-1.27%	-5.99%	-4.77%
Nifty Media	1,592.85	-0.66%	-2.14%	-2.05%
Nifty Metal	10,082.55	0.22%	1.28%	6.84%
Nifty MNC	30,196.50	-0.30%	-1.26%	2.65%
Nifty Pharma	21,977.70	-0.92%	-2.64%	-1.72%
Nifty Realty	875.90	-1.65%	-4.63%	-4.42%
Nifty Energy	35,255.55	-0.71%	-0.53%	2.21%

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

Nifty 50 Top 5 Gainers

Company	25-Sep-25	Prev_Day	% Change	1 Week
Hero Moto	5,354.50	5,277.00	1.47	-0.29
Axis Bank	1,166.60	1,158.90	0.66	2.97
Hindalco	745.65	741.05	0.62	-0.60
ONGC	239.67	238.52	0.48	1.73
Bharti Airtel	1,935.60	1,931.10	0.23	-0.28

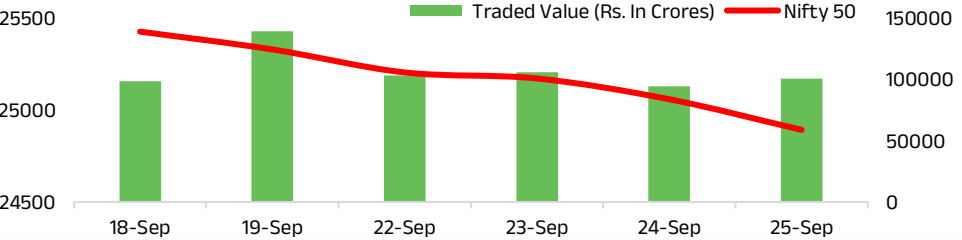
Source: NSE

Nifty 50 Top 5 Losers

Company	25-Sep-25	Prev_Day	% Change	1 Week
Power Grid	284.40	293	-3.03	-1.63
Tata Motors	664.30	683	-2.73	-6.59
TCS	2,957.40	3035	-2.57	-6.90
Asian Paints	2,404.00	2457	-2.17	-3.01
NTPC	340.50	348	-2.04	1.05

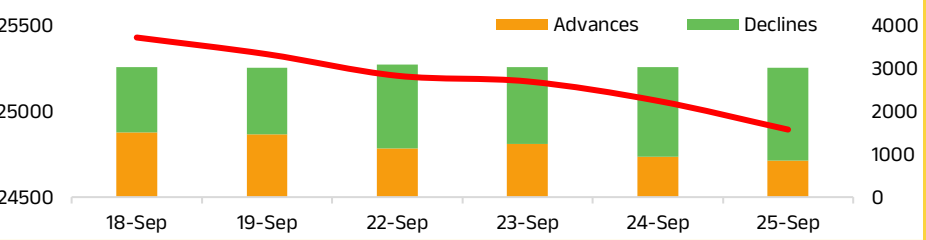
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

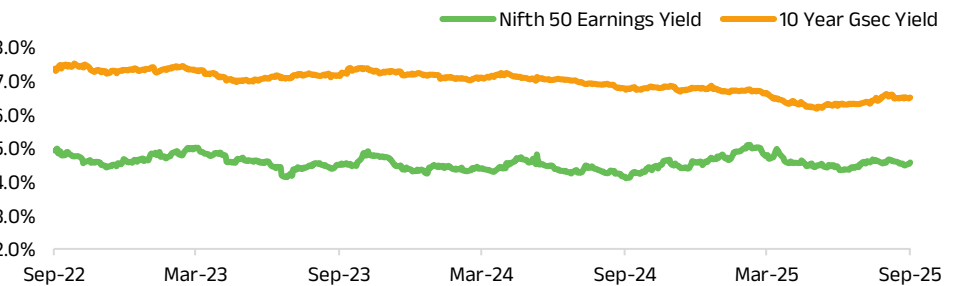
Indian equity markets extended their losing streak for a fifth consecutive session as investors booked profits amid persistent outflows by foreign institutional investors and uncertainty surrounding the U.S.-India trade talks. Overall, sentiment remained cautious ahead of India's H2FY26 borrowing plan and the release of key the U.S. macroeconomic data later this week.

Thomas Cook India has partnered with quick-commerce platform Blinkit to deliver borderless multi-currency cards within minutes, aiming to strengthen its digital distribution channel.

Reliance Consumer Products Ltd (RCPL) signed a Rs. 40,000 crore Memorandum of Understanding (MoU) with the Ministry of Food Processing Industries to establish integrated food manufacturing facilities across India.

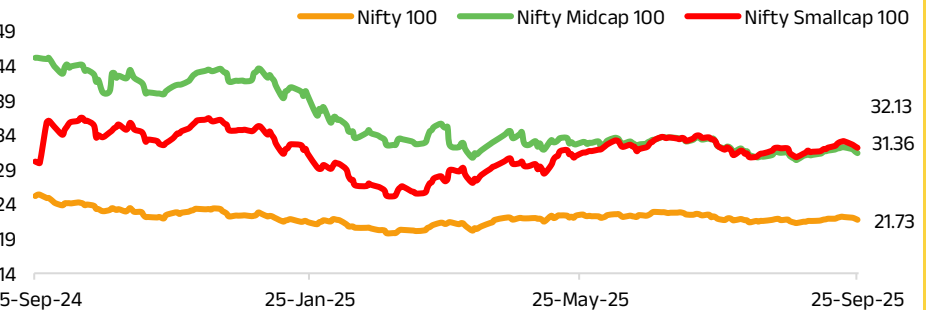
KPI Green Energy, a renewable energy developer and operator, secured a Rs. 3,200 crore finance facility from the State Bank of India (SBI) to support its solar and hybrid Independent Power Producer (IPP) projects in Gujarat.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



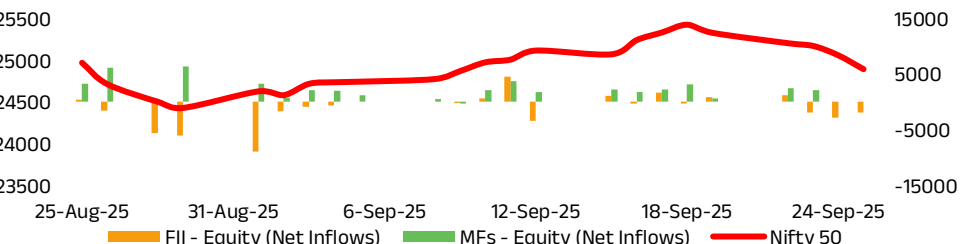
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-1867.85	-13,450	-66,184	-1,44,084
MF**	0	31,455	1,49,008	3,80,075
DII	5103.01	49,893	2,05,661	5,54,136

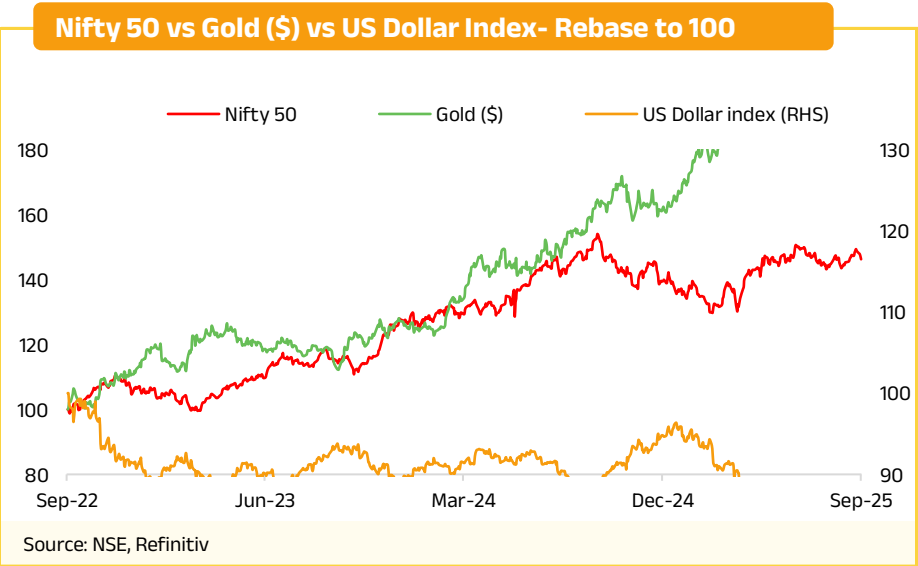
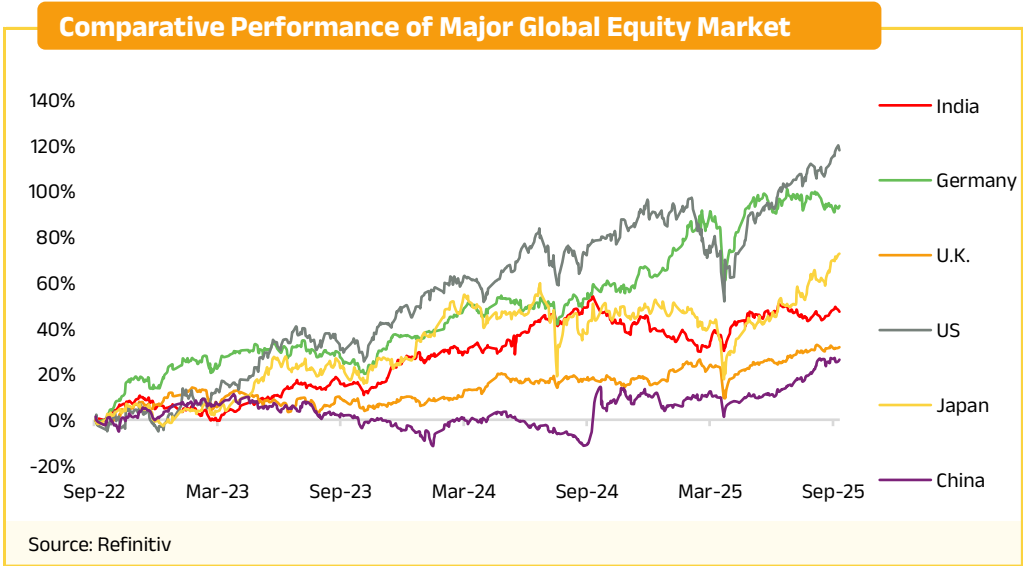
Source: SEBI, NSDL;**As on 24th Sep 2025;

F&O Trends			
	Latest	Previous	Change %
Near Futures	24967.70	25111.90	-0.57%
Near Basis	76.85	55.00	39.73%
Mid Futures	25093.70	25235.80	-0.56%
Mid Basis	202.85	178.90	13.39%
Near Open Interest (Cr.)	1.25	1.42	-12.00%
Mid Open Interest (Cr.)	0.60	0.37	62.83%
Rollover (%)	34.90	23.22	50.29%
Put Call Ratio (OI)	0.68	0.87	-21.90%
Put Call Ratio(Vol)	0.95	1.03	-7.69%
Source: NSE			


FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	4068	4674	38571
Index Options	1367760	1372810	453601
Stock Futures	27871	28344	400063
Stock Options	42961	42552	30643
Total	1442661	1448381	922879
Source: NSE			

Global Equity Market				
Global Indices	25-Sep-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3611.92	-0.53%	-0.59%	2.51%
Nasdaq 100 (U.S.)	24397.31	-0.43%	-0.24%	4.15%
FTSE (U.K.)	9213.98	-0.39%	-0.15%	-1.15%
DAX Index (Germany)	23534.83	-0.56%	-0.59%	-3.04%
CAC 40 Index (France)	7795.42	-0.41%	-0.75%	-0.61%
SSE Composite (China)	3853.30	-0.01%	0.56%	-0.78%
Nikkei (Japan)	45754.93	0.27%	1.00%	6.88%
Kospi (South Korea)	3471.11	-0.03%	0.28%	8.14%
HangSeng (Hong Kong)	26484.68	-0.13%	-0.23%	2.53%
Strait Times (Singapore)	4273.86	-0.39%	-0.90%	0.41%
Ibovespa Sao Paulo (Brazil)	145306.23	-0.81%	-0.13%	5.28%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8773.00	0.10%	0.32%	-2.22%
Jakarta Composite (Indonesia)	8040.66	-1.06%	0.40%	1.44%
KLSE (Malaysia)	1598.47	-0.07%	-0.03%	-0.25%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	25-Sep-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	1,13,054	-0.10%	3.06%	13.01%
Gold (\$/oz)	3,748.82	0.35%	2.88%	11.37%
Silver (INR/1 kg)	1,37,254	2.28%	8.13%	18.24%
Silver (\$/oz)	45.22	2.98%	8.18%	17.30%
Brent Crude(\$/bbl)	70.28	1.25%	-0.30%	0.50%
Crude Oil (INR/1 bbl)	5,769.00	2.52%	2.63%	3.65%
NYMEX Crude(\$/bbl)	65.41	0.17%	2.59%	0.66%
Natural Gas (INR/1 mmbtu)	253.70	0.20%	-6.73%	7.55%
Aluminium (INR/1 kg)	256.00	-0.14%	-1.92%	1.13%
Copper (INR/1 kg)	958.50	4.25%	5.31%	8.43%
Nickel (INR/1 kg)	1,362.30	0.34%	1.42%	2.68%
Lead (INR/1 kg)	185.50	-0.99%	-0.08%	1.64%
Zinc (INR/1 kg)	290.50	2.74%	3.42%	7.71%
Mentha Oil (INR/1 kg)	1,017.80	-0.10%	-1.07%	0.61%
Baltic Dry Index	2,266	1.16%	2.77%	16.56%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				




Term of the Day



Financial Risk

Definition: Financial risk refers to the possibility of losing money due to market fluctuations, credit defaults, liquidity issues, or other financial uncertainties.



Explanation

Companies face financial risks in areas such as investments, borrowing, and currency exchange. Managing financial risk involves using tools like hedging, diversification, and credit analysis. Financial risk management is crucial for maintaining profitability and ensuring long-term sustainability.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.34	6.68	-4.44	14.85
Flexi Cap Fund	-0.01	8.82	-4.69	16.40
Mid Cap Fund	-0.64	11.60	-4.27	20.48
Large & Mid Cap Fund	-0.26	9.14	-4.08	18.26
Small Cap Fund	0.16	12.21	-5.95	19.85
Multi Cap Fund	-0.25	9.73	-4.04	18.90
Focused Fund	-0.26	8.10	-4.95	16.03
Value Fund	0.26	7.48	-5.97	19.29
Contra Fund	-0.45	7.56	-5.37	20.42
ELSS	-0.08	9.08	-4.77	17.07
Equity Savings	0.30	5.01	3.62	9.98
Arbitrage Fund	0.30	2.91	6.25	6.71
Dividend Yield Fund	0.53	6.42	-6.80	19.71
Aggressive Hybrid Fund	0.11	7.14	-1.59	14.62
Balanced Advantage	-0.05	5.23	-0.60	11.84
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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