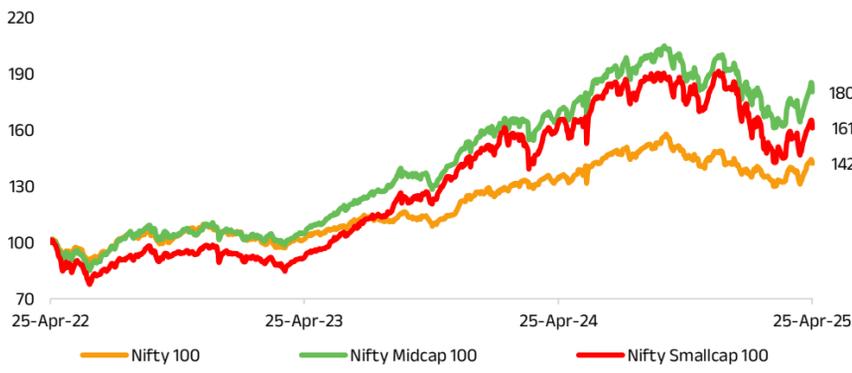


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	25-Apr-25	1 Day	1 Week	1 Month
Nifty 50	24,039.35	-0.86%	0.79%	1.57%
Nifty 100	24,581.30	-1.12%	0.67%	1.74%
Nifty 200	13,296.85	-1.36%	0.84%	1.96%
Nifty 500	21,848.15	-1.50%	0.77%	1.91%
Nifty Large Midcap 250	15,205.20	-1.81%	1.01%	2.09%
Nifty Midcap 150	19,694.85	-2.47%	1.35%	2.43%
Nifty Next 50	64,314.90	-2.41%	0.09%	2.57%
Nifty Smallcap 250	15,524.15	-2.46%	0.47%	2.24%

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

## Smart Beta Index

Index	25-Apr-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,822.10	-1.74%	3.02%	1.91%
NIFTY 500 Value 50	13,395.10	-2.17%	0.27%	0.14%
Nifty 200 Quality 30	19,649.40	-1.19%	1.65%	2.33%
Nifty 50 Equal Weight	30,040.65	-1.26%	0.84%	2.13%
NIFTY Alpha Low Volatility 30	25,998.15	-1.27%	1.69%	3.34%
Nifty High Beta 50	3,421.20	-3.55%	-0.45%	3.03%
Nifty Low Volatility 50	24,388.75	-1.19%	1.04%	3.49%
Nifty Midcap150 Momentum 50	56,965.90	-2.40%	1.46%	2.57%
Nifty PSE	9,470.15	-2.56%	-0.78%	1.13%
Nifty SME Emerge	13,839.75	-1.88%	1.42%	7.72%
Nifty 100 ESG	4,696.70	-1.46%	0.86%	1.93%

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

## Sector Indices

Index	25-Apr-25	1 Day	1 Week	1 Month
Nifty Auto	21,994.50	-1.67%	2.91%	1.18%
Nifty Bank	54,664.05	-0.97%	0.69%	5.92%
Nifty Consumption	11,247.15	-1.65%	-0.17%	4.50%
Nifty Financial	26,036.10	-1.02%	-0.14%	3.79%
Nifty FMCG	56,532.35	-0.62%	-0.25%	6.40%
Nifty Healthcare	13,829.80	-2.42%	0.87%	-0.90%
Nifty IT	35,562.25	0.72%	6.56%	-5.69%
Nifty Media	1,547.75	-3.24%	-2.11%	1.56%
Nifty Metal	8,569.75	-2.10%	1.10%	-6.17%
Nifty MNC	26,764.10	-1.69%	0.23%	1.97%
Nifty Pharma	21,482.55	-2.24%	1.68%	-0.28%
Nifty Realty	859.35	-2.80%	1.69%	-0.45%
Nifty Energy	33,956.50	-2.22%	0.47%	1.36%

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

## Nifty 50 Top 5 Gainers

Company	25-Apr-25	Prev_Day	% Change	1 Week
SBI Life Insurance Company Limited	1,695.10	1,608.20	5.40	5.40
TCS	3,448.00	3,401.60	1.36	4.52
Tech Mahindra	1,462.00	1,445.20	1.16	11.88
Ultratech Cem	12,237.00	12,159.00	0.64	2.82
Infosys	1,480.20	1,471.40	0.60	4.28

Source: NSE

## Nifty 50 Top 5 Losers

Company	25-Apr-25	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,193.00	1236	-3.51	-5.27
Axis Bank	1,166.30	1207	-3.38	-2.06
United Phos	661.85	684	-3.27	0.86
Divi's Lab	6,012.50	6216	-3.27	6.60
Indian Oil	134.65	138	-2.70	0.26

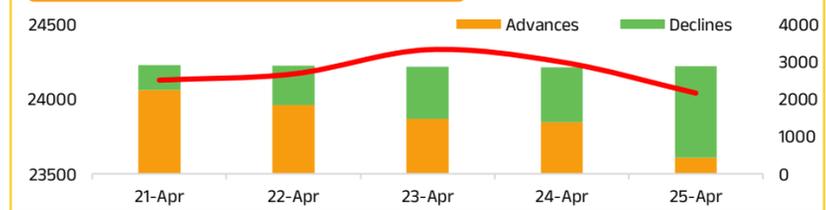
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

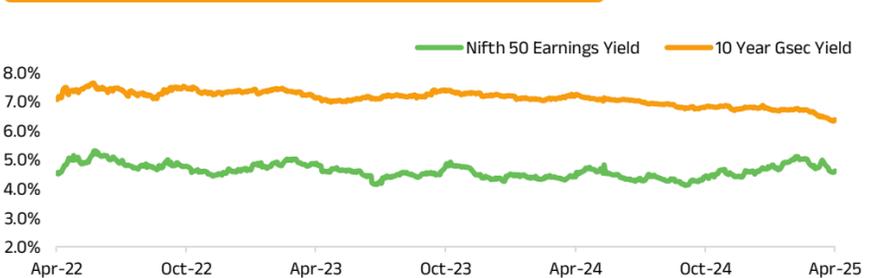
Indian equity markets lost early gains as geopolitical tensions led investors to book profits. Initially, markets opened strong due to progress in the U.S. trade negotiations and potential rate cut by the U.S. Federal Reserve. However, the recent terrorist attack in Pahalgam, Jammu and Kashmir, and India's subsequent downgrading of diplomatic relations with Pakistan.

Vedanta group firm Hindustan Zinc Ltd (HZL) announced a 47.3% rise in consolidated net profit, reaching Rs. 3,003 crore for the quarter ended Mar 2025, driven by higher income. This is a significant increase from the Rs. 2,038 crore net profit reported in the same period last year. The company's income for the Jan-Mar 2025 quarter rose to Rs. 9,314 crore, up from Rs. 7,822 crore

Hindalco Industries launched a Rs. 500-crore facility in Chakan, Pune, dedicated to manufacturing EV components. This facility aims to meet the increasing demand for lightweight and crash-resistant battery solutions.

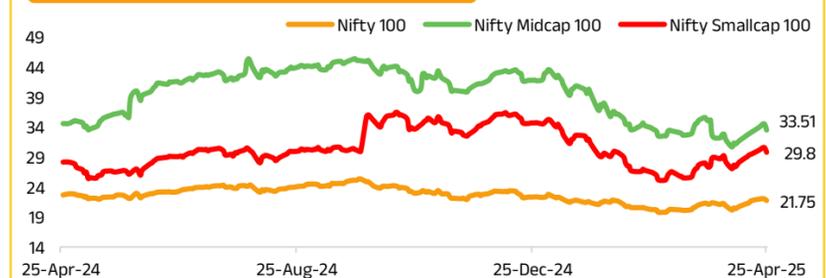
Patel Engineering Ltd, an infrastructure development company, announced that it has secured two projects in Maharashtra and Arunachal Pradesh, with a combined value of Rs. 2,036.89 crore.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



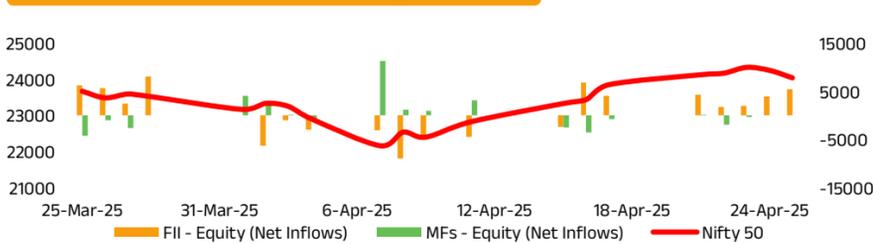
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## PE Comparison across Market cap



Source: NSE

## FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

## Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	5425.58	-5,678	-5,678	-122,252
MF**	-347.55	12,767	12,767	124,900
DII	3539.85	22,249	22,249	208,133

Source: SEBI, NSDL; \*\*As on 23rd Apr 2025;

## F&O Trends

	Latest	Previous	Change %
Near Futures	24139.10	24245.70	-0.44%
Near Basis	99.75	-1.00	-10075.00%
Mid Futures	24243.40	24373.00	-0.53%
Mid Basis	204.05	126.30	61.56%
Near Open Interest (Cr.)	1.17	0.34	246.00%
Mid Open Interest (Cr.)	0.14	1.15	-87.80%
Rollover (%)	11.13	79.08	-85.92%
Put Call Ratio (OI)	0.87	0.90	-2.45%
Put Call Ratio(Vol)	0.95	0.99	-3.91%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	8146	7190	23175
Index Options	3835980	3844515	238578
Stock Futures	55415	52442	362837
Stock Options	45507	45571	27594
Total	3945048	3949719	652184

Source: NSE

## Global Equity Market

Global Indices	25-Apr-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3021.54	0.70%	4.63%	-4.45%
Nasdaq 100 (U.S.)	19432.56	1.14%	6.43%	-4.22%
FTSE (U.K.)	8415.25	0.09%	1.69%	-2.87%
DAX Index (Germany)	22242.45	0.81%	4.89%	-3.75%
CAC 40 Index (France)	7536.26	0.45%	3.44%	-7.06%
SSE Composite (China)	3295.06	-0.07%	0.56%	-2.22%
Nikkei (Japan)	35705.74	1.90%	2.81%	-5.49%
Kospi (South Korea)	2546.30	0.95%	2.53%	-2.66%
HangSeng (Hong Kong)	21980.74	0.32%	2.74%	-5.84%
Strait Times (Singapore)	3823.78	-0.21%	2.78%	-3.31%
Ibovespa Sao Paulo (Brazil)	134739.28	0.12%	3.93%	2.02%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia) <sup>[1]</sup>	7968.20	0.60%	1.91%	0.32%
Jakarta Composite (Indonesia)	6678.91	0.99%	3.74%	7.11%
KLSE (Malaysia)	1509.20	0.18%	0.65%	-0.29%

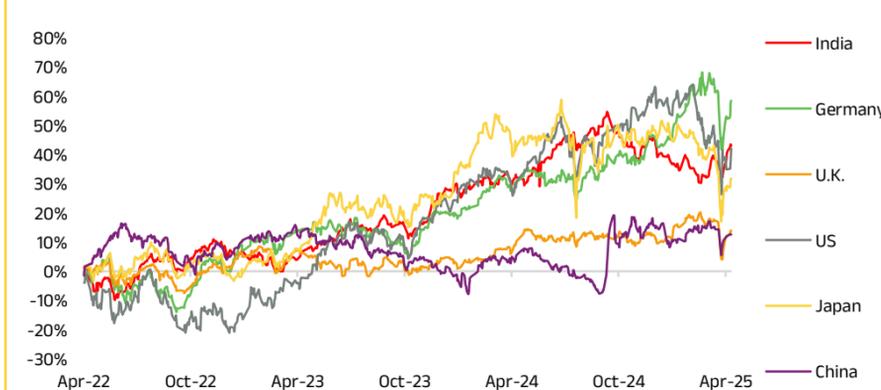
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

Commodity Prices	25-Apr-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	95,244	-0.50%	0.65%	8.93%
Gold (\$/oz)	3,318.20	-0.90%	-0.28%	9.88%
Silver (INR/1 kg)	97,442	0.01%	2.75%	-0.07%
Silver (\$/oz)	33.08	-1.46%	1.50%	-1.97%
Brent Crude(\$/bbl)	69.59	-1.00%	-0.22%	-6.55%
Crude Oil (INR/1 bbl)	5,369.00	0.92%	0.36%	-9.49%
NYMEX Crude(\$/bbl)	63.75	0.47%	-1.88%	-8.11%
Natural Gas (INR/1 mmbtu)	250.50	-2.98%	-9.92%	-25.42%
Aluminium (INR/1 kg)	235.55	0.13%	1.20%	-7.81%
Copper (INR/1 kg)	852.65	-0.32%	2.38%	-6.21%
Nickel (INR/1 kg)	1,358.90	-0.56%	0.19%	-3.14%
Lead (INR/1 kg)	183.80	2.94%	-0.84%	-2.67%
Zinc (INR/1 kg)	257.10	0.71%	2.96%	-8.47%
Mentha Oil (INR/1 kg)	994.00	0.49%	0.41%	-0.45%
Baltic Dry Index	1,373	1.48%	8.88%	-16.38%

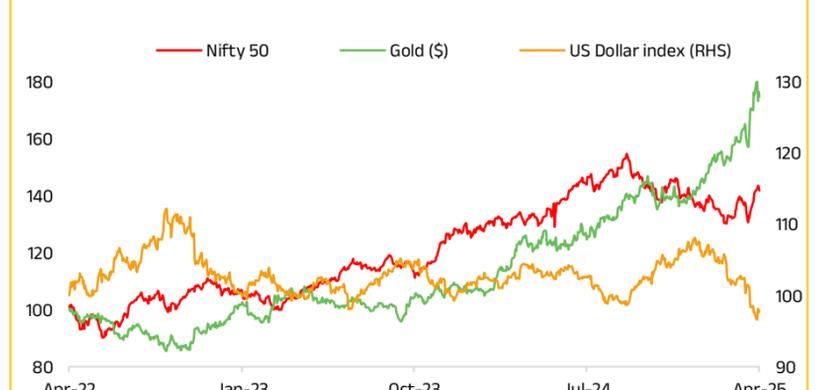
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Comparative Performance of Major Global Equity Market



Source: Refinitiv

## Nifty 50 vs Gold (\$) vs US Dollar Index - Rebase to 100



Source: NSE, Refinitiv

## Term of the Day



### Speculative Shares

**Definition:** Speculation is the practice of engaging in a transaction in which an investor puts his money in a risky financial instrument with the objective of generating significant returns from it. Speculative share or a speculative stock can thus be defined as one that contains a very high element of risk. Such stocks usually trade at very low prices but at times can fluctuate considerably and provide windfall gains (and losses as well) to an investor.



### Explanation

Since speculative shares normally trade at very low prices, a trader can buy such stocks in considerable volume. If the stock moves up even marginally, then also the investor can book windfall gains by selling it in the market. It needs to be noted that speculative stocks tend to outperform in bull markets and underperform in bearish market. Speculative stocks often account for a very small portion of the portfolio of experienced investors as they can boost the returns within a short span of time.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.70	-1.90	6.19	14.41
Mid Cap Fund	1.44	-6.27	7.04	19.17
Large & Mid Cap Fund	1.66	-3.79	7.21	17.10
Small Cap Fund	1.72	-8.09	2.96	17.84
Multi Cap Fund	1.62	-4.49	5.56	18.10
Focused Fund	1.74	-3.90	6.09	15.04
Value Fund	1.46	-4.56	4.62	18.61
Contra Fund	2.05	-3.79	7.63	20.47
ELSS	2.09	-4.56	5.08	16.02
Equity Savings	1.44	1.96	7.63	9.37
Arbitrage Fund	0.87	3.54	7.24	6.50
Dividend Yield Fund	1.35	-4.49	5.36	18.37
Aggressive Hybrid Fund	1.79	-1.34	7.41	13.72
Balanced Advantage	1.42	-0.52	6.05	11.36

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 24 Apr, 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.**