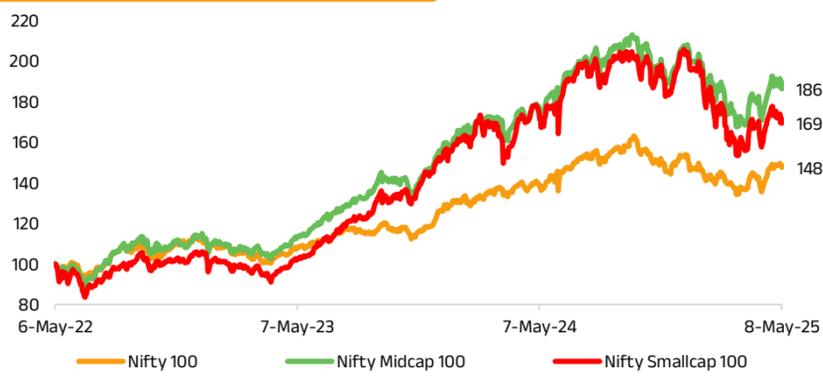


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-May-25	1 Day	1 Week	1 Month
Nifty 50	24,273.80	-0.58%	-0.25%	7.71%
Nifty 100	24,678.00	-0.84%	-0.67%	6.93%
Nifty 200	13,326.75	-1.02%	-0.83%	6.91%
Nifty 500	21,843.05	-1.04%	-0.85%	6.65%
Nifty Large Midcap 250	15,195.00	-1.30%	-1.04%	6.74%
Nifty Midcap 150	19,591.80	-1.76%	-1.42%	6.55%
Nifty Next 50	62,760.25	-2.14%	-2.71%	3.21%
Nifty Smallcap 250	15,180.45	-1.19%	-1.17%	4.70%

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

Smart Beta Index

Index	8-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,072.25	-1.37%	-0.68%	9.37%
NIFTY 500 Value 50	13,229.35	-1.71%	-1.55%	4.67%
Nifty 200 Quality 30	19,604.95	-0.99%	-0.94%	5.88%
Nifty 50 Equal Weight	29,964.80	-0.91%	-0.81%	6.35%
NIFTY Alpha Low Volatility 30	25,854.00	-1.34%	-1.43%	5.55%
Nifty High Beta 50	3,337.05	-2.15%	-2.78%	3.59%
Nifty Low Volatility 50	24,264.80	-1.06%	-1.43%	5.45%
Nifty Midcap150 Momentum 50	56,843.00	-1.65%	-1.52%	7.19%
Nifty PSE	9,337.85	-1.74%	-2.31%	3.11%
Nifty SME Emerge	13,241.83	-0.78%	-2.57%	2.66%
Nifty 100 ESG	4,680.05	-1.12%	-0.76%	6.28%

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

Sector Indices

Index	8-May-25	1 Day	1 Week	1 Month
Nifty Auto	22,674.15	-1.90%	1.64%	12.59%
Nifty Bank	54,365.65	-0.45%	-1.31%	7.63%
Nifty Consumption	11,227.15	-1.59%	-0.79%	5.37%
Nifty Financial	25,980.65	-0.71%	-0.51%	6.91%
Nifty FMCG	56,020.70	-1.01%	-0.75%	3.17%
Nifty Healthcare	13,696.75	-1.95%	-2.54%	3.26%
Nifty IT	36,002.45	0.23%	0.58%	8.30%
Nifty Media	1,527.05	0.20%	0.87%	1.98%
Nifty Metal	8,428.40	-2.09%	-1.79%	5.81%
Nifty MNC	26,790.55	-1.20%	-0.83%	5.59%
Nifty Pharma	21,115.05	-1.62%	-3.02%	3.62%
Nifty Realty	843.80	-2.47%	-4.75%	6.08%
Nifty Energy	33,534.75	-1.51%	-2.06%	5.23%

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

Nifty 50 Top 5 Gainers

Company	8-May-25	Prev_Day	% Change	1 Week
HCL Tech	1,580.70	1,563.30	1.11	0.84
Axis Bank	1,172.20	1,161.30	0.94	-1.08
Titan Industries Limited	3,369.30	3,338.90	0.91	-0.31
Kotak Bank	2,112.60	2,094.90	0.84	-4.33
Britannia Industries Limited	5,391.00	5,351.00	0.75	-0.88

Source: NSE

Nifty 50 Top 5 Losers

Company	8-May-25	Prev_Day	% Change	1 Week
United Phos	656.50	688	-4.58	-2.00
Divi's Lab	5,960.50	6148	-3.05	-2.08
BPCL	307.95	317	-2.82	-0.68
M&M	3,033.10	3120	-2.78	3.56
Tata Beverages	1,116.00	1146	-2.62	-4.27

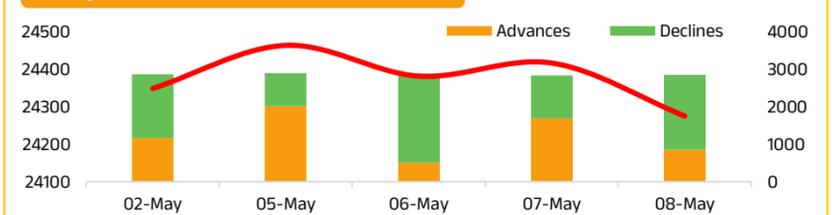
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

Indian equity markets fell due to rising tensions between India and Pakistan after India announced strikes on Pakistani air defense radars. This increased market uncertainty, with fears of a major conflict between the nuclear-armed nations. Consequently, profit-taking occurred across almost all sectors, except for the information technology sector, which remained relatively stable.

Hindustan Construction Company (HCC) announced a significant decrease of 63.37% in its consolidated net profit, amounting to Rs. 90.08 crore for the fourth quarter ending Mar 2025, down from Rs. 245.23 crore in the same quarter of the previous year. The total income for the reviewed quarter was Rs. 1,392.20 crore, a decline from Rs. 1,813.05 crore reported a year earlier.

Coal India plans to establish clean energy initiatives totaling approximately 4.5 gigawatts, with an investment of Rs. 25,000 crore (around \$3 billion), in its pursuit of net zero carbon emissions from its operations by 2070.

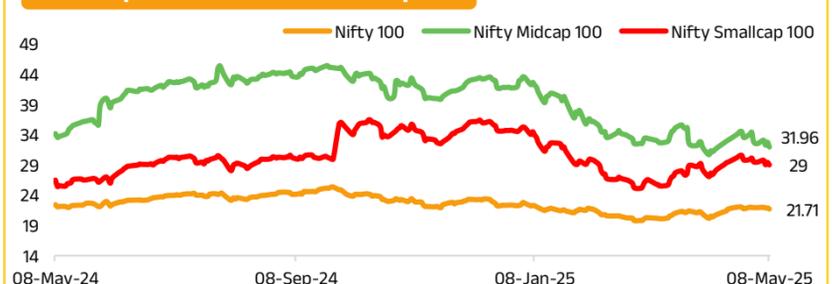
Brigade Group has announced the acquisition of an 11-acre land parcel located opposite ITPL in Whitefield, Bengaluru. This land is set to be transformed into a commercial project featuring a gross leasable area of 1.5 million square feet and a gross development value (GDV) exceeding Rs. 2,000 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



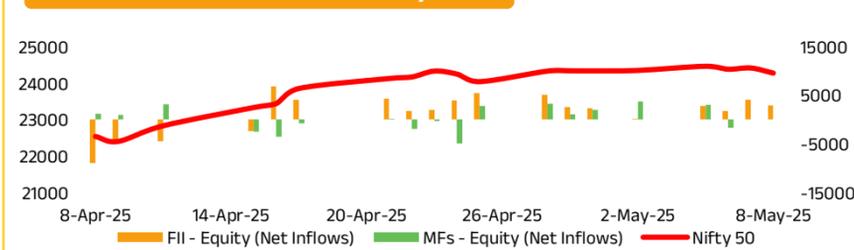
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	2951.95	11,739	15,963	-100,611
MF**	-1671.13	5,072	22,115	134,247
DII	-596.25	6,464	34,692	220,576

Source: SEBI, NSDL;**As on 6th May 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24271.90	24461.40	-0.77%
Near Basis	-1.90	47.00	-104.04%
Mid Futures	24362.60	24570.30	-0.85%
Mid Basis	88.80	155.90	-43.04%
Near Open Interest (Cr.)	1.28	1.32	-2.91%
Mid Open Interest (Cr.)	0.19	0.17	9.20%
Rollover (%)	14.48	13.23	9.42%
Put Call Ratio (OI)	1.00	0.97	3.39%
Put Call Ratio(Vol)	1.23	0.82	50.36%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3832	3363	14186
Index Options	1509705	1515599	290726
Stock Futures	20899	18763	252029
Stock Options	61288	58927	32170
Total	1595725	1596652	589109

Source: NSE

Global Equity Market

Global Indices	8-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3102.77	0.68%	1.26%	14.07%
Nasdaq 100 (U.S.)	20063.56	0.98%	1.40%	17.40%
FTSE (U.K.)	8531.61	-0.32%	0.41%	7.85%
DAX Index (Germany)	23352.69	1.02%	3.80%	15.15%
CAC 40 Index (France)	7694.44	0.89%	1.32%	8.37%
SSE Composite (China)	3352.00	0.28%	2.23%	6.56%
Nikkei (Japan)	36928.63	0.41%	1.31%	11.86%
Kospi (South Korea)	2579.48	0.22%	0.89%	10.51%
HangSeng (Hong Kong)	22775.92	0.37%	2.97%	13.16%
Strait Times (Singapore)	3848.22	-0.44%	0.41%	10.92%
Ibovespa Sao Paulo (Brazil)	136231.90	2.12%	0.86%	9.92%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8191.70	0.16%	0.57%	9.08%
Jakarta Composite (Indonesia)	6827.75	-1.42%	0.90%	13.87%
KLSE (Malaysia)	1542.74	-0.46%	0.16%	6.87%

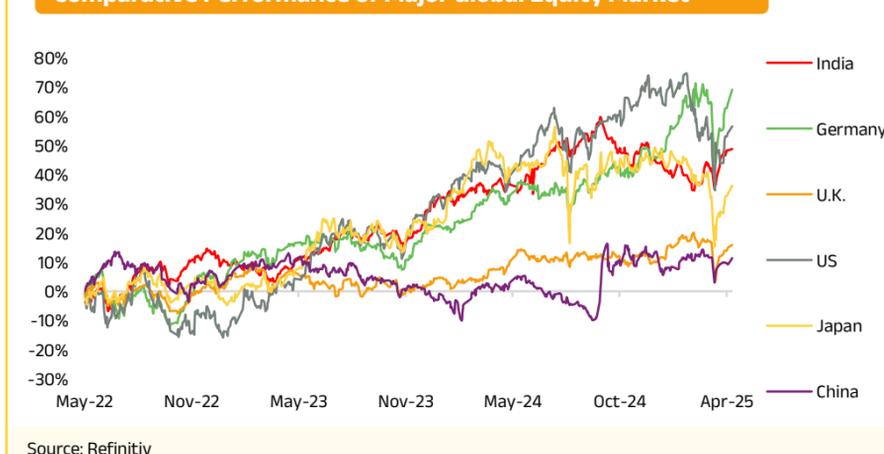
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

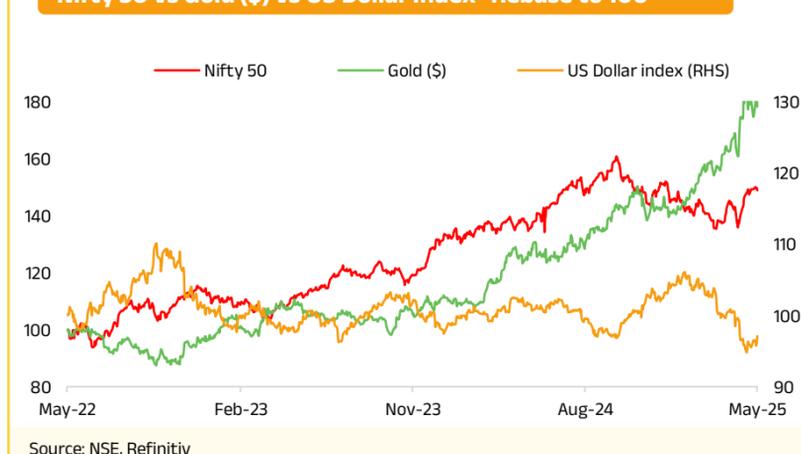
Commodity Prices	8-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	96,664	-0.54%	2.91%	9.79%
Gold (\$/oz)	3,305.25	-1.76%	2.00%	10.77%
Silver (INR/1 kg)	95,343	-0.15%	1.46%	6.12%
Silver (\$/oz)	32.49	0.06%	0.28%	8.88%
Brent Crude(\$/bbl)	61.95	0.24%	0.10%	-7.16%
Crude Oil (INR/1 bbl)	4,911.00	-1.70%	-4.60%	-5.72%
NYMEX Crude(\$/bbl)	61.05	3.09%	1.09%	1.85%
Natural Gas (INR/1 mmbtu)	306.20	4.58%	6.14%	-2.36%
Aluminium (INR/1 kg)	231.75	-0.47%	-1.30%	-1.13%
Copper (INR/1 kg)	848.80	-0.19%	1.19%	4.55%
Nickel (INR/1 kg)	1,331.30	-1.08%	-1.49%	3.69%
Lead (INR/1 kg)	184.25	0.22%	1.32%	2.73%
Zinc (INR/1 kg)	251.00	0.38%	-0.34%	-0.61%
Mentha Oil (INR/1 kg)	990.50	0.06%	-0.49%	1.12%
Baltic Dry Index ^[1]	1,374	-2.28%	-2.62%	2.38%

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



Income shares

Definition: These are a class of capital shares which are offered by a dual-purpose fund that has little room for capital appreciation but gives the holder a portion of all income earned in the portfolio.



Explanation

Investors that own income shares receive dividends from the entire fund's performance. Those who invest in this class of stock are typically looking for steady income in the form of dividends instead of capital gains. An income share carries lower risk than a capital share. The fund's two kinds of potential cash flows allow individual investors to choose classes that are more in line with their investment objectives.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	6.04	-2.14	7.09	15.89
Mid Cap Fund	6.30	-7.59	6.41	20.69
Large & Mid Cap Fund	6.08	-4.98	7.09	18.50
Small Cap Fund	4.65	-12.58	2.55	19.07
Multi Cap Fund	5.80	-6.52	5.62	19.42
Focused Fund	5.82	-4.50	6.64	16.53
Value Fund	5.56	-6.35	4.79	19.81
Contra Fund	6.05	-4.76	7.57	21.59
ELSS	6.09	-5.84	5.29	17.40
Equity Savings	2.39	1.63	7.87	9.95
Arbitrage Fund	0.65	3.40	7.16	6.56
Dividend Yield Fund	5.51	-5.94	4.78	19.07
Aggressive Hybrid Fund	5.02	-1.90	7.78	14.92
Balanced Advantage	3.76	-0.83	6.45	12.13

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.

^[1] Data as on 07 May, 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.