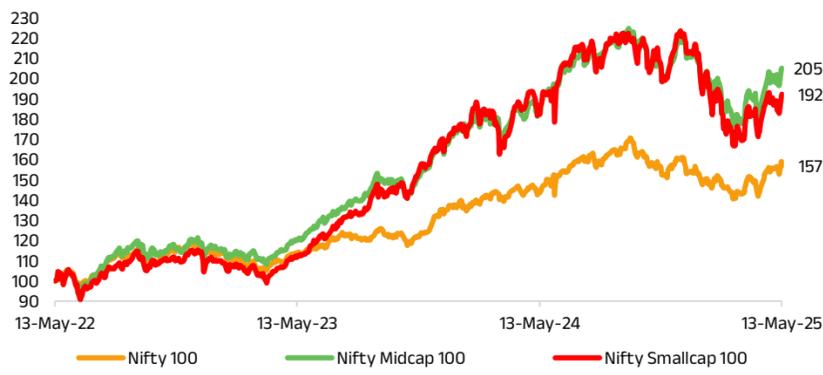


Broad Indices Historical Movement



Source: NSE

Broad Indices

	13-May-25	1 Day	1 Week	1 Month
Nifty 50	24,578.35	-1.39%	0.82%	7.66%
Nifty 100	25,087.10	-1.16%	1.01%	7.35%
Nifty 200	13,604.90	-0.94%	1.47%	7.77%
Nifty 500	22,349.40	-0.72%	1.79%	7.69%
Nifty Large Midcap 250	15,626.35	-0.46%	2.37%	8.42%
Nifty Midcap 150	20,379.30	0.24%	3.73%	9.48%
Nifty Next 50	65,065.80	-0.02%	1.94%	5.84%
Nifty Smallcap 250	15,815.45	0.84%	4.18%	6.96%

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

Smart Beta Index

Index	13-May-25	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,985.75	-0.36%	2.75%	11.78%
NIFTY 500 Value 50	13,589.50	-0.88%	2.03%	5.75%
Nifty 200 Quality 30	20,200.90	-0.60%	2.05%	7.18%
Nifty 50 Equal Weight	30,536.95	-0.98%	1.21%	6.83%
NIFTY Alpha Low Volatility 30	26,328.50	-0.41%	0.52%	6.55%
Nifty High Beta 50	3,514.85	0.30%	4.16%	8.13%
Nifty Low Volatility 50	24,666.35	-0.79%	0.67%	5.47%
Nifty Midcap150 Momentum 50	59,488.50	0.48%	4.56%	10.83%
Nifty PSE	9,577.35	-0.42%	1.60%	3.69%
Nifty SME Emerge	13,725.80	0.80%	2.73%	4.08%
Nifty 100 ESG	4,782.25	-0.90%	1.43%	7.57%

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

Sector Indices

Index	13-May-25	1 Day	1 Week	1 Month
Nifty Auto	23,167.25	-1.00%	1.89%	12.74%
Nifty Bank	54,940.85	-0.80%	1.23%	7.72%
Nifty Consumption	11,396.55	-1.22%	-0.16%	4.91%
Nifty Financial	26,206.00	-1.10%	0.91%	6.72%
Nifty FMCG	56,334.15	-1.34%	-0.97%	1.06%
Nifty Healthcare	13,899.45	0.97%	-0.85%	4.30%
Nifty IT	37,354.60	-2.42%	4.14%	14.09%
Nifty Media	1,616.50	1.66%	7.19%	7.49%
Nifty Metal	8,834.65	-0.89%	3.64%	8.16%
Nifty MNC	27,484.15	-0.24%	1.87%	6.10%
Nifty Pharma	21,359.75	1.22%	-0.81%	4.39%
Nifty Realty	866.30	-0.72%	1.25%	9.64%
Nifty Energy	34,549.25	-0.53%	2.30%	6.60%

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

Nifty 50 Top 5 Gainers

Company	13-May-25	Prev_Day	% Change	1 Week
Divi's Lab	6,076.50	5,942.00	2.26	-1.37
Hero Moto	4,063.60	3,984.90	1.98	4.93
Sun Pharma	1,700.00	1,686.20	0.82	-6.55
Cipla	1,520.10	1,511.60	0.56	0.58
Adani Ports & SEZ	1,369.20	1,362.10	0.52	3.66

Source: NSE

Nifty 50 Top 5 Losers

Company	13-May-25	Prev_Day	% Change	1 Week
United Phos	642.85	677	-5.02	-5.33
Infosys	1,568.60	1627	-3.58	3.78
Power Grid	298.45	309	-3.43	-2.97
HCL Tech	1,619.60	1670	-3.04	2.56
TCS	3,515.00	3620	-2.91	1.59

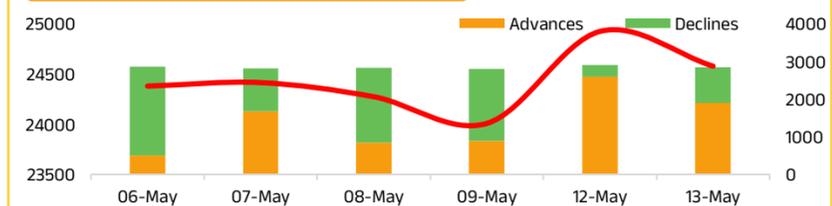
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

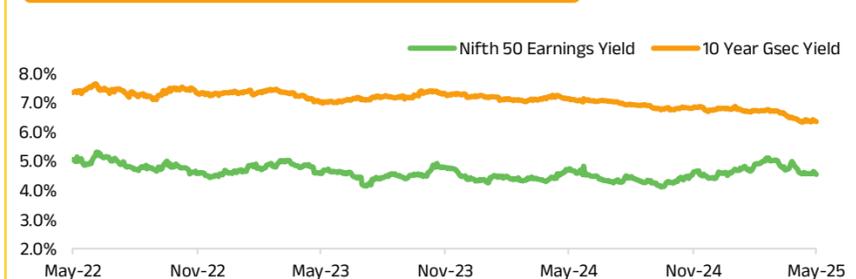
Indian equity markets declined due to profit booking after a recent rally driven by a tentative ceasefire between India and Pakistan. Sentiment was dampened as India approached the World Trade Organization to propose retaliatory tariffs against the U.S. over steel and aluminium duties, underscoring that trade war concerns persist despite ongoing negotiations.

GAIL (India) Ltd, a state-owned enterprise, announced a slight increase of 1.3% YoY in its consolidated net profit, reaching Rs. 2,505.61 crore for the fourth quarter ending Mar 2025, in contrast to the Rs. 2,474.31 crore profit recorded in the same quarter of the previous year. Nevertheless, on a sequential basis, the company's net profit experienced a significant decline of 39.4%, down from Rs. 4,084.24 crore in the Dec 2024 quarter.

Tata Motors, a leading automobile manufacturer, announced a 51% decrease in its consolidated net profit, amounting to Rs. 8,470 crore for the quarter ending Mar 2025. The revenue from operations remained unchanged at Rs. 1.19 lakh crore during the same period.

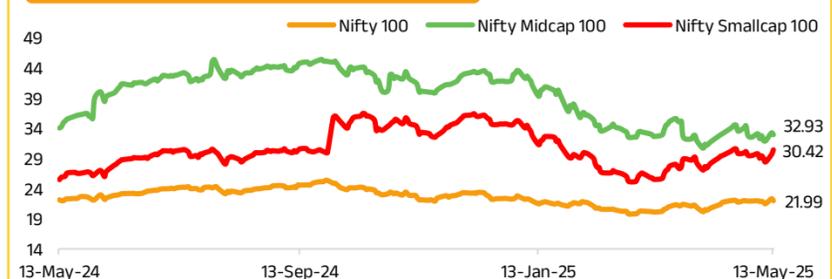
Hero MotoCorp, India's foremost manufacturer of two-wheelers, announced a 6% increase in its standalone net profit YoY, amounting to Rs. 1,081 crore for the fourth quarter ending Mar 2025. Additionally, revenue from operations grew by 4% YoY, reaching Rs. 9,519 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



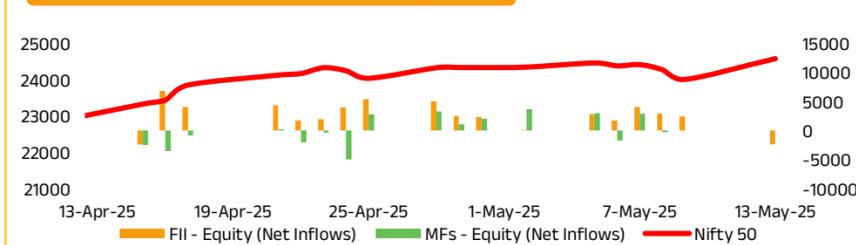
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-2388.23	11,778	16,002	-100,572
MF**	-231.91	7,756	24,799	136,931
DII	4273.8	19,464	47,692	233,576

Source: SEBI, NSDL; **As on 8th May 2025;

F&O Trends

	Latest	Previous	Change %
Near Futures	24640.20	25044.10	-1.61%
Near Basis	61.85	119.40	-48.20%
Mid Futures	24757.10	25150.80	-1.57%
Mid Basis	178.75	226.10	-20.94%
Near Open Interest (Cr.)	1.22	1.26	-3.14%
Mid Open Interest (Cr.)	0.29	0.27	7.50%
Rollover (%)	21.27	19.43	9.45%
Put Call Ratio (OI)	0.85	1.29	-34.12%
Put Call Ratio(Vol)	0.85	0.73	16.39%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	6764	5552	28263
Index Options	1662868	1636479	608059
Stock Futures	31189	24115	383115
Stock Options	78737	79660	86303
Total	1779558	1745807	1105741

Source: NSE

Global Equity Market

Global Indices	13-May-25	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3225.50	0.74%	5.11%	10.23%
Nasdaq 100 (U.S.)	21197.70	1.58%	7.11%	13.42%
FTSE (U.K.)	8602.92	-0.02%	0.06%	8.02%
DAX Index (Germany)	23638.56	0.31%	1.67%	16.02%
CAC 40 Index (France)	7873.83	0.30%	2.30%	10.82%
SSE Composite (China)	3374.87	0.17%	1.77%	4.22%
Nikkei (Japan)	38183.26	1.43%	3.67%	13.69%
Kospi (South Korea)	2608.42	0.04%	1.90%	7.22%
HangSeng (Hong Kong)	23108.27	-1.87%	1.97%	10.49%
Strait Times (Singapore)	3881.05	0.13%	0.53%	10.49%
Ibovespa Sao Paulo (Brazil)	138963.11	1.76%	4.08%	8.83%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8269.00	0.43%	1.44%	8.14%
Jakarta Composite (Indonesia) ^[2]	6832.80	0.07%	-0.95%	9.11%
KLSE (Malaysia)	1582.39	2.32%	2.97%	8.77%

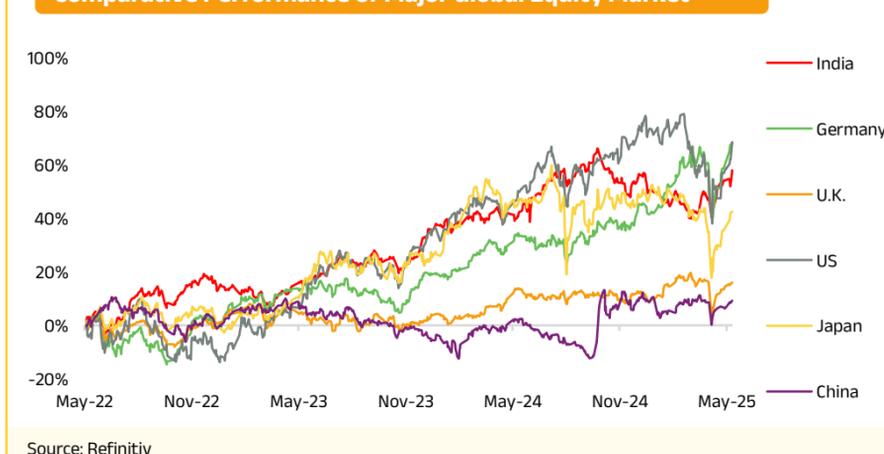
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

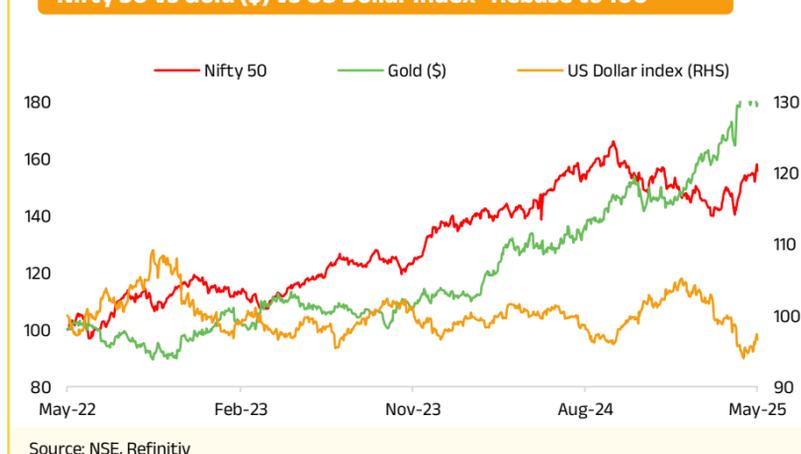
Commodity Prices	13-May-25	1 Day	1 Week	1 Month
Gold (INR/10 gm)	94,036	1.52%	-2.76%	0.98%
Gold (\$/oz)	3,247.40	0.42%	-5.30%	0.35%
Silver (INR/1 kg)	96,785	3.20%	1.21%	4.11%
Silver (\$/oz)	32.89	0.89%	-1.05%	1.97%
Brent Crude(\$/bbl)	65.75	1.54%	4.45%	-0.96%
Crude Oil (INR/1 bbl)	5,306.00	1.53%	10.27%	1.98%
NYMEX Crude(\$/bbl)	64.84	2.72%	7.67%	4.90%
Natural Gas (INR/1 mmbtu)	312.30	-3.91%	4.45%	1.36%
Aluminium (INR/1 kg)	239.55	1.50%	2.70%	1.23%
Copper (INR/1 kg)	866.00	1.25%	1.63%	3.28%
Nickel (INR/1 kg)	1,347.70	-0.97%	0.33%	1.68%
Lead (INR/1 kg)	183.60	0.58%	0.52%	0.33%
Zinc (INR/1 kg)	257.00	-0.06%	2.49%	-0.66%
Mentha Oil (INR/1 kg)	991.00	-0.05%	0.23%	0.67%
Baltic Dry Index ^[1]	1,304	0.38%	-7.25%	2.35%

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



Primary Instrument

Definition: It is a type of financial instrument whose price is derived from its own market value or whose price is not derived from any other instrument. It simply means that the price of the primary instrument is directly determined by the market.



Explanation

Primary instruments include stocks, bonds, Certificate of Deposit (CD) and anything else that has its own value. In contrast to this, the price of derivative instruments, such as options, swaps and futures, is based on the value of their underlying assets like spot equity, currency, commodity and bonds. Hence, derivative products are known non-primary instruments.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	6.68	2.30	9.83	18.06
Mid Cap Fund	8.75	-0.84	10.72	24.22
Large & Mid Cap Fund	7.57	0.67	10.63	21.42
Small Cap Fund	6.87	-4.57	8.16	22.89
Multi Cap Fund	7.47	-0.36	9.72	22.49
Focused Fund	7.10	0.66	9.99	19.09
Value Fund	7.03	-0.67	8.65	22.76
Contra Fund	7.03	0.11	10.98	24.21
ELSS	7.29	-0.22	8.85	20.22
Equity Savings	2.63	3.18	8.84	10.67
Arbitrage Fund	0.50	3.31	7.01	6.48
Dividend Yield Fund	6.29	-0.85	8.20	21.71
Aggressive Hybrid Fund	5.78	2.14	10.45	16.88
Balanced Advantage	4.30	2.02	8.31	13.36

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.

^[1]Data as on 12 May, 2025; ^[2]Data as on 09 May, 2025

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