



06 March 2025

## INDIAN EQUITY MARKET

- Indian equity markets rose for the second consecutive day supported by positive global cues. Firm global cues underpinned sentiment as the U.S. administration has announced a one-month delay on tariffs affecting cars entering the U.S. from Canada and Mexico, raising hopes for negotiations. However, the broader 25% duties imposed on Canada and Mexico remain in effect with no resolution in sight and more levies are set to begin in Apr 2025. Additionally, a drop in the U.S. dollar index further extended the gains.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.83% and 0.93% to close at 74,340.09 and 22,544.70 respectively.
- The overall market breadth on BSE was strong with 2,980 scrips advancing and 1,022 scrips declining. A total of 101 scrips remained unchanged.

## CORPORATE NEWS

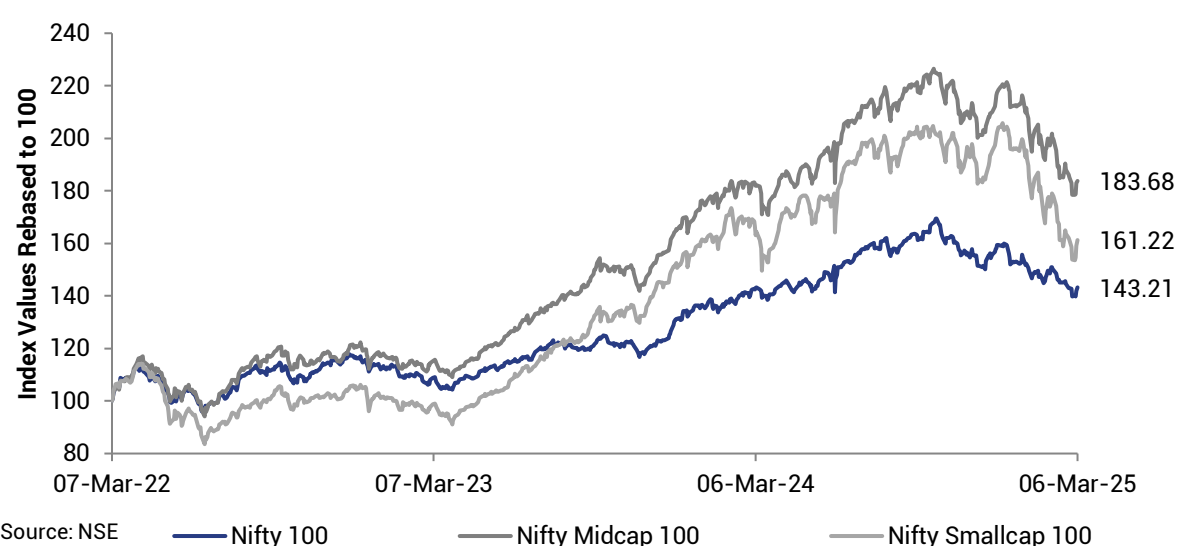
- IndiGo is set to commence non-stop long-haul services to Manchester and Amsterdam utilizing leased Boeing 787-9 aircraft starting in Jul 2025.
- Nespresso, a fully owned subsidiary of Nestlé, aims to expand its presence in India by opening additional retail locations after the introduction of its inaugural boutique-style store at Citywalk in Delhi.
- Kalpataru Projects International Ltd (KPIL) has acquired new contracts valued at Rs. 2,306 crore in both domestic and international markets, thereby increasing its total order book to Rs. 22,500 crore. The international contracts were obtained through its transmission and distribution (T&D) division, whereas the buildings division secured orders within India.

## GLOBAL EQUITY MARKET

- The U.S. equity markets declined due to persistent worries regarding the economic repercussions of the new tariffs imposed by the U.S. President on Canada, Mexico, and China.
- European equity markets mostly rose as investors responded to quarterly earnings reports and the European Central Bank's decision to lower interest rates, while also monitoring ongoing developments regarding tariffs

## INDIAN DERIVATIVES MARKET

- Nifty Mar 2025 Futures stood at 22,620.95, a premium of 76.25 points above the spot closing of 22,544.70. The turnover on NSE's Futures and Options segment fell to Rs.6,424.37 crore on March 06, 2025, compared with Rs. 3,83,394.70 crore on March 05, 2025.
- The NSE Put-Call ratio stood at 0.95 compared with the previous session's close of 0.86.



Source: NSE

## EQUITY MARKET UPDATE

Indian Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty 50	22,545	0.93	-4.49	0.31	-4.65	26,277	21,710	20.04	21.84
Nifty 100	23,039	0.96	-4.64	0.22	-5.95	27,336	22,140	20.28	22.42
Nifty 500	20,447	0.94	-5.65	0.33	-8.62	24,573	19,466	22.47	23.55
Nifty Midcap 100	49,348	0.37	-7.76	1.00	-13.73	60,926	45,293	33.47	28.96
Nifty Smallcap 250	14,503	1.49	-9.91	-1.23	-18.30	18,688	13,284	27.34	24.69
Nifty SME Emerge	12,833	2.12	-14.66	9.69	-22.72	17,224	10,327	38.58	64.40

Source: MFI 360 Explorer

Sector Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Auto	20,960	0.78	-10.04	-1.05	-8.21	27,696	20,067	20.14	34.35
Nifty Bank	48,628	0.28	-3.48	1.38	-4.39	54,467	45,829	12.76	16.27
Nifty FMCG	51,890	1.19	-7.08	-3.69	-8.64	66,439	50,199	42.29	43.21
Nifty IT	38,145	0.19	-11.33	3.09	-11.98	46,089	32,281	28.91	28.80
Nifty Media	1,462	0.97	-10.75	-24.59	-19.56	2,182	1,344	NA	524.07
Nifty Metal	8,889	2.34	6.28	7.64	2.76	10,322	7,592	20.50	19.46
Nifty Pharma	20,423	1.47	-7.20	6.71	-12.77	23,908	18,190	30.87	34.37
Nifty Realty	826	-0.17	-9.89	-9.99	-21.49	1,150	783	40.04	51.49
Nifty Energy	31,730	2.03	-4.02	-21.56	-9.83	45,022	29,313	14.63	13.16

Source: MFI 360 Explorer

Thematic Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nifty Financial Services	23,163	0.49	-2.10	10.37	-1.49	25,202	20,363	15.41	17.97
Nifty India Consumption	10,439	0.76	-6.56	4.79	-8.13	13,058	9,694	39.68	42.47
Nifty Infrastructure	7,980	1.47	-3.27	-4.27	-5.72	9,704	7,590	21.48	20.49
Nifty MNC	25,802	1.16	-5.01	2.66	-7.63	32,841	24,353	32.44	46.40
Nifty Public Sector Enterprises	8,724	1.93	-2.48	-9.17	-8.48	11,815	7,956	11.28	9.36

Source: MFI 360 Explorer

Global Indices	Px Last	Change in %				52 Week		Current PE	3 Year Avg PE
		1 Day	1 Month	1 Year	YTD	High	Low		
Nasdaq 100	20,053	-2.79	-7.91	11.29	-4.57	22,223	16,974	35.82	27.51
Nasdaq Composite	18,069	-2.61	-8.70	12.71	-6.43	20,205	15,223	19.75	21.19
FTSE 100	8,683	-0.83	-0.51	13.07	6.24	8,909	7,613	15.06	11.89
CAC 40	8,198	0.29	2.37	3.05	11.07	8,259	7,030	16.52	12.63
DAX	23,419	1.47	6.93	32.19	17.63	23,476	17,025	15.72	13.55
Nikkei	37,705	0.77	-3.49	-5.95	-5.49	42,427	31,156	20.86	17.69
Hang Seng	24,370	3.29	16.65	48.25	21.48	24,411	16,044	11.15	9.91
SSE Composite Index	3,381	1.17	3.38	11.22	0.88	3,674	2,690	12.00	12.11

Source: MFI 360 Explorer; Returns are based in local currency

F&O Trends	Px Last	Previous	Change %
Near Futures	22,621.00	22,441.30	0.80
Near Basis	76.25	104.05	-26.72
Mid Futures	22,763.80	22,590.20	0.77
Mid Basis	219.15	252.90	-13.35
Near Open Interest (Cr.)	1.81	1.78	1.56
Mid Open Interest (Cr.)	0.14	0.14	-1.39
Rollover (%)	10.00	10.08	-0.74

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	15,423	17,313	-1,889	-22,114	-134,715
Mutual Funds**	9,000	6,954	2,046	36,163	93,782

\*As on 6th March 2025; \*\*As on 25th February 2025; Source: SEBI, NSDL

## INDIAN ECONOMY

- According to a report released by the Centre for Research on Energy and Clean Air, India bought fossil fuels worth EUR 205.84 billion from Russia from the beginning of the Ukraine war until Mar 2, 2025. This comprised EUR 112.5 billion (USD 121.59 billion) for purchase of crude oil, which is refined into fuels like petrol and diesel at refineries, and EUR 13.25 billion for coal.
- The Finance Minister stated that tariffs are a valid tool of trade policy and affirmed that India's existing tariff structure aligns completely with the World Trade Organization (WTO) guidelines.
- According to data released by the Goods and Services Tax Network portal, the growth in e-way bills, or electronic permits, generated by businesses for transporting goods within and across states, slowed to 14.7% YoY in Feb 2025, down from 23.1% growth in Jan 2025. 111.6 million e-way bills generated in Feb 2025.

## INDIAN DEBT MARKET

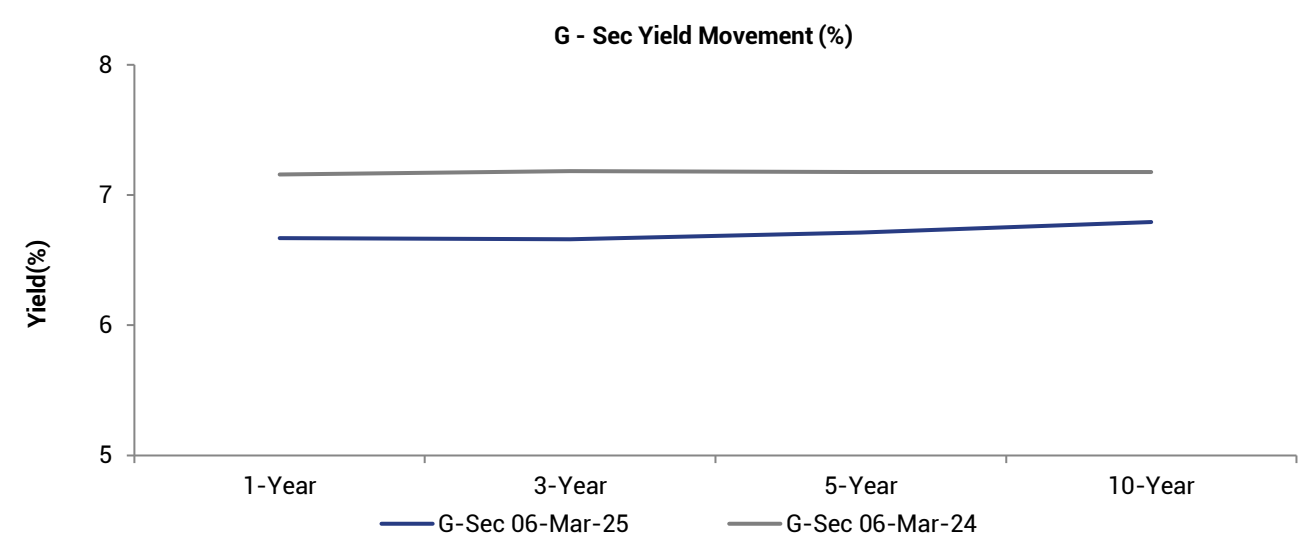
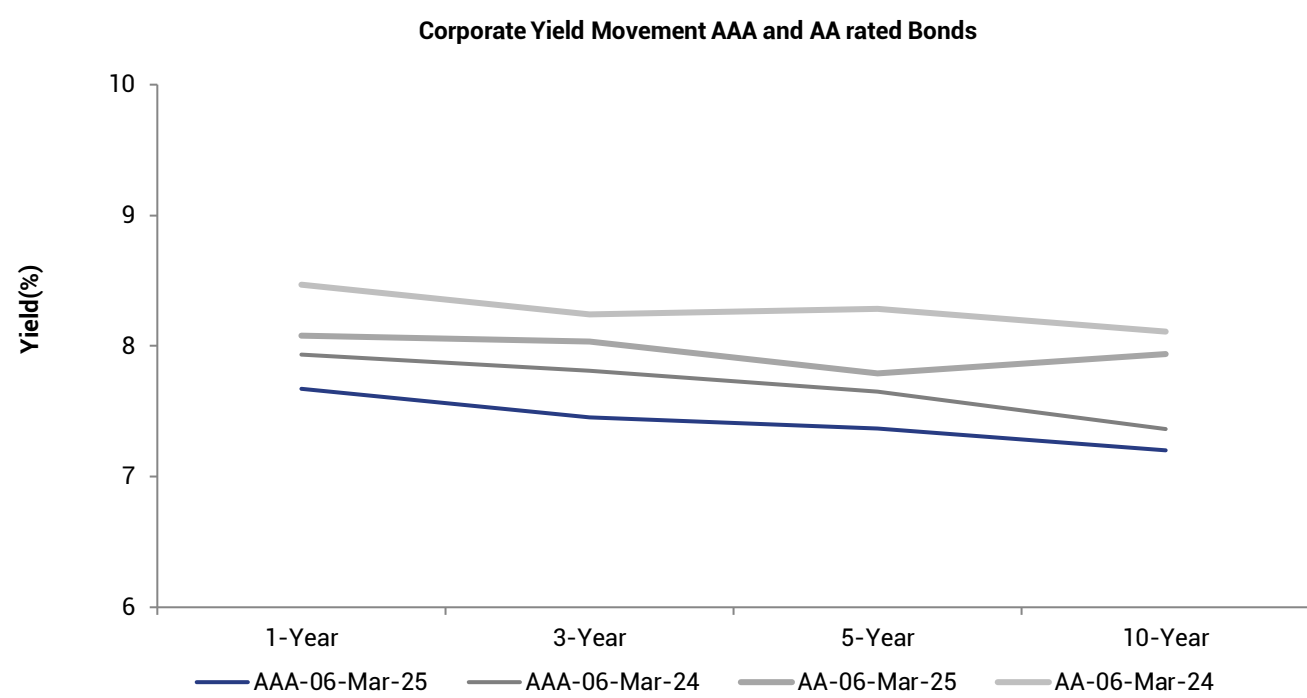
- Bond yields dipped as the RBI's latest liquidity measures boosted sentiment. The central bank is set to buy government securities through Open Market Operation worth Rs. 50,000 billion each on Mar 12 & 18, 2025, followed by a \$10 billion three-year dollar/rupee swap on Mar 24, 2025.
- Yield on the 10-year benchmark paper (6.79% GS 2034) fell by 4 bps to close at 6.68% as compared to the previous close 6.72%.
- RBI announced to conduct the auction of 14-day Variable Rate Repo for the notified amount of Rs. 50,000 crore on Mar 07, 2025.

## MONEY MARKET

- RBI conducted the auction of 1-day Variable Rate Repo for the notified amount of Rs. 25,000 crore for which amount of Rs. 4,442 crore was accepted and the cut-off yield stood at 6.26%.

## SPREAD ANALYSIS

- Yields on gilt fell up to 4 bps across the maturities, barring 19 year paper that was unchanged.
- Corporate bond yields fell up to 6 bps across the curve.
- Difference in spread between AAA corporate bond and gilt contracted up to 4 bps across the segments, barring 1 & 10 year papers that expanded by 1 & 3 bps, respectively, while 7 year paper remained steady.



Source: Refinitiv

Key Indicators	Current	Previous
GDP (Q3 FY'25)	6.20%	5.60%
IIP (Dec'24)	3.20%	5.00%
Manufacturing PMI Feb'25	56.30	57.70
Credit Growth (Feb 07,2025)	11.30%	11.40%
Deposit Growth (Feb 07,2025)	10.60%	10.30%
WPI (Jan'25)	2.31%	2.37%
CPI (Jan'25)	4.31%	5.22%
Current Account Deficit (Q2 of FY25, in \$ Billion)	11.20	10.20
Fiscal Deficit (Apr to Jan 2025, as a % of Budget Estimates)	69.39	54.23
Trade Deficit (In \$ billion-Jan25)	22.99	21.94

Since May-17, MOSPI has revised base year of IIP & WPI from 2004-05 to 2011-12, and for CPI from 2010 to 2012

Source: Refinitiv

## DEBT MARKET UPDATE

Policy Rates (%)	06-Mar-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	6.25	6.25	6.50	6.50
CRR	4.00	4.00	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	06-Mar-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	6.30	6.40	6.54	6.52
CALL	6.21	6.31	6.45	6.44
T-Repo	5.87	6.21	6.25	6.35
OIS- 3 M	6.33	6.40	6.48	6.77
OIS- 6 M	6.25	6.32	6.35	6.76

Source: FBIL

Certificate of Deposit (%)	06-Mar-25	Week Ago	Month Ago	Year Ago
3-Month	7.62	7.51	7.45	7.70
6-Month	7.78	7.64	7.58	7.83
9-Month	7.74	7.63	7.56	7.80
12-Month	7.73	7.58	7.53	7.67

Source: Refinitiv

Commercial Paper (%)	06-Mar-25	Week Ago	Month Ago	Year Ago
3-Month	7.59	7.53	7.41	7.68
6-Month	7.73	7.64	7.58	7.85
12-Month	7.70	7.62	7.55	7.75

Source: Refinitiv

Maturity Buckets Yield	Yield (%)				Change in bps		
	Closing	Previous	1 Month	1 Year	1 Day	1 Month	1 Year
1 Yr GOI Bond	6.56	6.58	6.52	7.03	-1	4	-47
3 Yr GOI Bond	6.55	6.58	6.59	7.06	-2	-4	-51
5 Yr GOI Bond	6.60	6.63	6.59	7.05	-3	1	-45
10 Yr GOI Bond	6.68	6.72	6.66	7.05	-4	2	-37
15 Yr GOI Bond	6.86	6.90	6.80	7.11	-4	6	-25
US 10 Yr Treasury	4.28	4.27	4.44	4.10	2	-16	18

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	06-Mar-25	1 Month Avg.	1 Year Avg.	06-Mar-25	1 Month Avg.	1 Year Avg.
1 Yr	100	99	80	141	138	134
3 Yr	79	81	61	137	134	120
5 Yr	66	67	54	108	106	102
10 Yr	41	41	43	115	111	97

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	06-Mar-25	Week Ago	Month Ago	Year Ago
Govt Securities	66,070	37,021	52,497	34,148
Call Money	14,033	18,397	14,448	9,995
T-Repo	336,761	397,350	361,612	310,464
LAF	NA	NA	NA	NA
Treasury Bills	3,254	17,275	7,702	18,039
Interbank Liquidity	NA	NA	NA	NA

Source: Refinitiv

Transaction Trends (Debt)	Amount in ₹ Cr.				
	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	1,193	360	833	2,477	-6,455
Mutual Funds**	15,417	20,861	-5,444	-49,263	-104,473

\*As on 6th March 2025; \*\*As on 25th February 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: March 3-7, 2025	0	0	0.00%
Month: Mar 2025	0	0	0.00%
H2: Oct 24-Mar 25	661,000	661,000	100.00%

Source: RBI

<sup>[1]</sup>Data as on 05 Mar, 2025

GLOBAL ECONOMY

- According to the Labor Department, the U.S. initial unemployment claims fell to 221,000 for the week ended Feb 28, 2025, representing a decline of 21,000 from the unrevised figure of 242,000 recorded the previous week.
- According to Eurostat, Eurozone's retail sales growth decreased to 1.5% YOY in Jan 2025 from revised 2.2% in Dec 2025.

INTERNATIONAL MARKET UPDATE

- According to the Labor Department, the U.S. labor productivity experienced a decline of 1.5% in the fourth quarter ended Dec 2024, in contrast to the previously reported increase of 1.2%.
- The European Central Bank has once again reduced its key interest rate by 25 basis points on 06th Mar 2025 primary due to the anticipated decline in exports and investment, set against a backdrop of significant trade uncertainty resulting from the ongoing tariff conflict. The main refinancing rate was reduced by a quarter basis points to 2.65% and the marginal lending facility rate to 2.90%.

COMMODITY MARKET

- Gold prices fell as U.S. tariff concerns eased after the President's administration announced a one-month postponement on tariffs impacting vehicles imported from Canada and Mexico, thereby fostering optimism for ongoing negotiations.
- Brent crude oil prices (spot) rose amid uncertainties surrounding the future demand for oil, coupled with concerns regarding potential oversupply in the market.

CURRENCY UPDATE

- The Indian rupee in spot trade fell against the U.S. dollar amid uncertainty over trade tariffs and persistent foreign fund outflows.
- Euro rose against the U.S. dollar ahead of the European Central Bank monetary policy meeting.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	2,910	-0.30	1.87	35.46	10.91	2,951	2,156
Silver (\$/oz)	33	0.00	1.31	35.02	12.99	35	24
NYMEX Crude(\$/bbl)	67	0.06	-6.07	-16.83	-8.05	87	66
Brent Crude(\$/bbl)	71	0.94	-5.77	-19.26	-6.89	94	71
Baltic Dry Index <sup>[1]</sup>	1,228	-2.69	54.86	-43.57	23.17	2,419	715
Core Commodity Index	365	-0.12	-1.75	13.68	2.25	383	315
Industrial Metals Index	NA	NA	NA	NA	NA	NA	NA
Agriculture Index	NA	NA	NA	NA	NA	NA	NA
Energy Index	NA	NA	NA	NA	NA	NA	NA
Precious Metals Index	NA	NA	NA	NA	NA	NA	NA

Source: Refinitiv

Composite PMI Data	Latest Reported	1 Month Ago	3 Months Ago	6 Months Ago	1 Year Ago
U.S.	51.60	52.70	54.90	54.60	52.50
Euro Zone	50.20	50.20	48.30	51.00	49.20
Germany	50.40	50.50	47.20	48.40	46.30
France	45.10	47.60	45.90	53.10	48.10
U.K.	50.50	50.60	50.50	53.80	53.00
Japan	52.00	51.10	50.10	52.90	50.60
China	51.50	51.10	52.30	51.20	52.50

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	85,468	-0.61	1.44	32.67	12.59	86,360	56,247
Silver (1 kg)	96,343	0.27	1.77	34.62	12.22	98,788	66,519
Crude Oil (1 bbl)	5,775	-3.17	-6.79	-10.89	-4.81	7,796	5,521
Natural Gas (1 mmbtu)	388	1.95	32.21	138.76	15.19	388	131
Aluminium (1 kg)	264	1.33	2.47	30.33	8.77	265	196
Copper (1 kg)	880	0.45	3.25	20.73	10.23	934	694
Nickel (1 kg)	1,400	-0.35	1.52	-5.76	4.59	2,104	1,312
Lead (1 kg)	188	-0.24	-1.52	4.68	0.00	202	179
Zinc (1 kg)	277	0.27	1.56	25.80	-2.67	301	207
Mentha Oil (1 kg)	999	0.22	-0.32	-2.17	0.45	1,189	932
Cotton (1 bales)	NA	NA	NA	NA	NA	NA	NA

Source: MCX-SX

CURRENCY MARKET UPDATE

Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
USD/INR	87.12	0.18	-0.53	5.18	1.75	87.95	82.64
EUR/INR	93.82	0.10	3.20	4.01	5.93	94.42	87.29
GBP/INR	112.07	0.05	2.91	6.36	4.70	112.50	102.50
YEN(100)/INR	58.80	0.76	1.69	6.12	8.04	60.09	51.52
SGD/INR	65.24	0.02	0.61	5.52	4.15	65.48	61.06

Source: Refinitiv

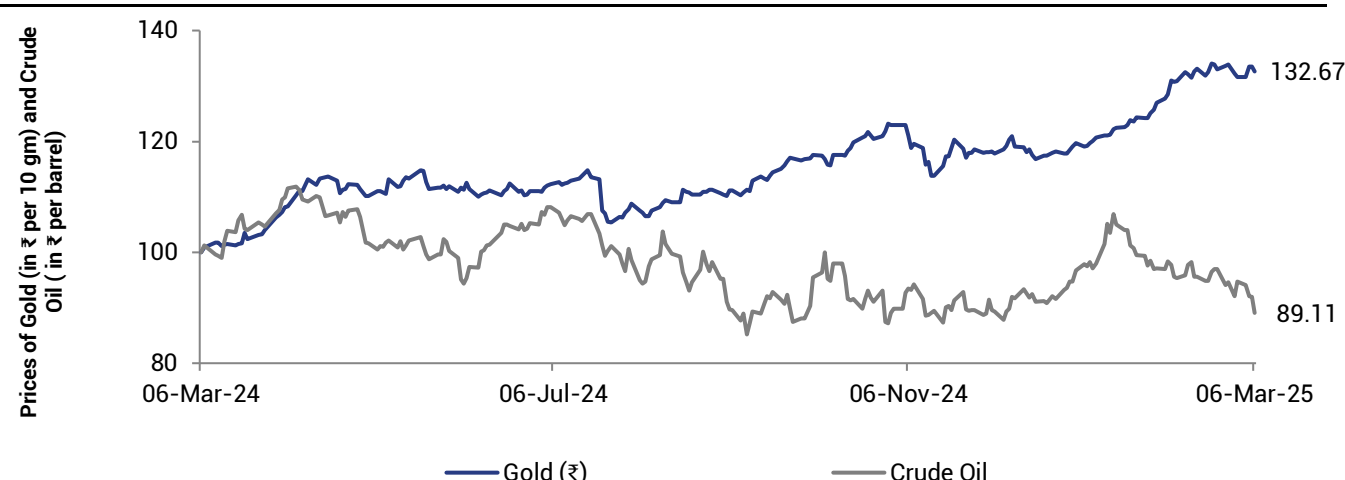
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.08	-0.06	3.87	-1.05	4.15	1.12	1.01
GBP/USD	1.29	-0.09	3.60	1.20	2.97	1.34	1.21
USD/JPY	147.95	-0.62	-2.30	-0.95	-5.87	161.99	139.56
SGD/USD	0.75	-0.11	1.36	0.47	2.46	0.78	0.73
Dollar Index	104.06	-0.23	-3.37	0.67	-4.08	110.18	100.16

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	87.21	0.03	1.55	-0.55	2.85
Future 3 Month	87.48	0.01	1.74	-0.70	2.82
Future 6 Month	87.84	0.01	1.90	-0.53	3.06
NDF 1 Month	87.28	0.24	1.64	-0.56	2.91
NDF 3 Month	87.41	0.02	1.24	-0.88	2.72
NDF 6 Month	88.04	0.23	1.36	-0.71	2.89

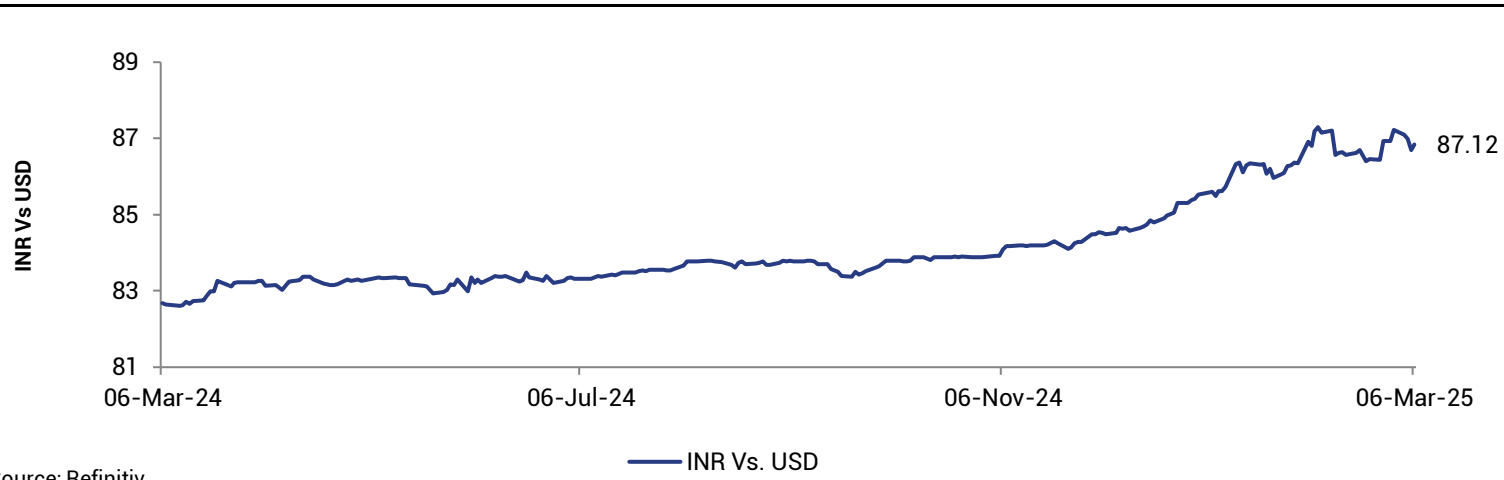
Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



Source: MCX-SX

RUPEE VS. U.S. DOLLAR



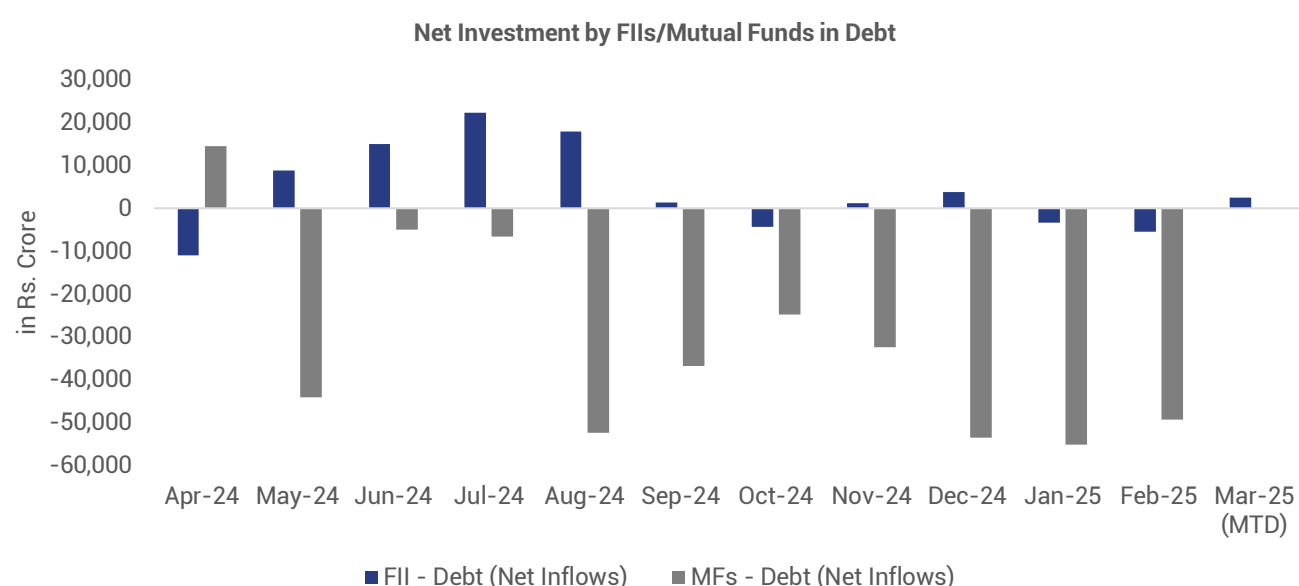
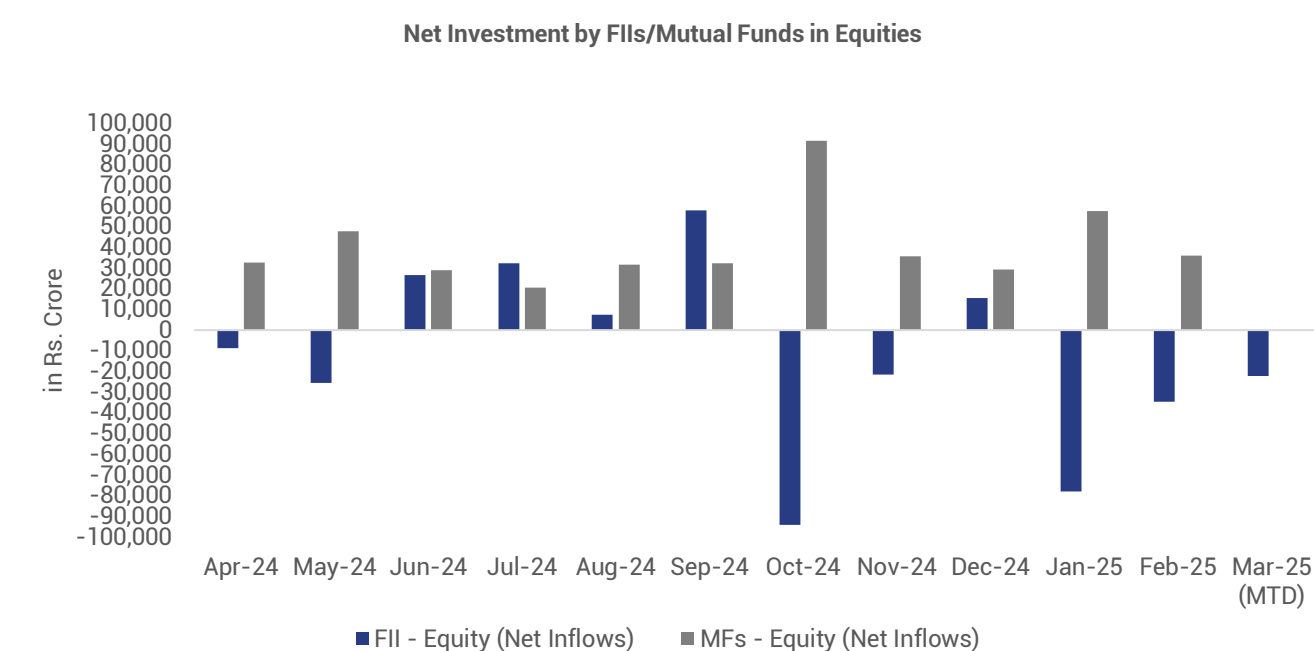
Source: Refinitiv

<sup>[1]</sup>Data as on 05 Mar, 2025

## MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 8,999.94 crore as against sale of Rs. 6,954.11 crore as on Feb 25, 2025. This led to a net purchase of Rs. 2,045.83 crore compared with a net purchase of Rs. 5,682.56 crore on Feb 24, 2025.
- Mutual funds bought debt worth Rs. 15,417.03 crore as against sale of Rs. 20,861.40 crore as on Feb 25, 2025. This led to a net sale of Rs. 5,444.37 crore compared with a net sale of Rs. 3,395.64 crore on Feb 24, 2025.

## TRANSACTION TRENDS FIIs vs MFs



## EVENTS CALENDAR

Event	Date
Forex Reserves	07-Mar-25
Loans and Advances to Central Government	07-Mar-25
Loans and Advances to State Government	07-Mar-25
CPI Inflation (Feb 2025)	12-Mar-25
Index of Industrial Production (Jan 2025)	12-Mar-25
Reserve Money	12-Mar-25

<sup>[1]</sup>Data as on 05 Mar, 2025

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## MF SCHEMES CATEGORY WISE PERFORMANCE

Category-Equity	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Large Cap Fund	0.45	-4.99	-11.01	1.63	13.49	15.85
Mid Cap Fund	1.60	-6.71	-15.18	6.02	19.35	22.59
Large & Mid Cap Fund	1.07	-5.91	-13.03	4.38	16.69	19.31
Small Cap Fund	2.32	-9.13	-17.63	3.80	18.12	26.22
Multi Cap Fund	1.42	-6.45	-13.57	3.58	18.01	21.03
Focused Fund	0.64	-5.65	-12.39	3.56	14.54	16.93
Value Fund	0.77	-6.13	-13.83	1.30	18.39	21.38
Contra Fund	0.58	-5.93	-12.93	4.22	20.34	23.38
ELSS	0.83	-6.45	-13.54	2.32	15.58	19.18
Sectoral	0.96	-6.21	-11.65	4.47	17.60	20.91
Thematic	0.98	-6.45	-13.77	2.48	16.74	19.32
Dividend Yield Fund	0.86	-5.26	-13.64	1.63	17.49	22.36

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Category-Debt	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Overnight Fund	5.97	6.08	6.40	6.55	6.12	4.89
Liquid Fund	6.49	6.68	6.98	7.19	6.53	5.29
Ultra Short Duration Fund	5.01	5.89	6.73	6.97	6.19	5.37
Low Duration Fund	4.70	5.49	6.89	7.23	6.30	5.95
Money Market Fund	4.75	5.93	6.97	7.23	6.51	5.68
Short Duration Fund	5.42	3.79	6.81	7.15	6.35	5.97
Medium Duration Fund	6.54	5.79	7.65	7.90	6.57	6.47
Medium to Long Duration Fund	11.20	1.09	5.98	7.17	6.14	5.61
Long Duration Fund	17.94	-4.86	4.69	7.25	6.87	5.43
Corporate Bond Fund	5.99	3.00	7.01	7.60	6.15	6.09
Gilt Fund	18.16	-2.43	5.27	7.10	6.34	5.63
Gilt Fund with 10 year constant duration	13.06	3.55	7.66	8.48	6.68	5.78
Dynamic Bond	12.62	-0.97	5.73	7.15	6.33	5.80
Banking and PSU Fund	4.91	2.22	6.69	7.31	6.12	5.98
Floater Fund	6.21	4.77	7.06	7.91	6.77	6.31
Credit Risk Fund	3.93	12.11	8.41	8.29	9.33	7.19

Less than 1 yr return are simple annualised and greater than 1 yr returns are CAGR

Category-Hybrid	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Arbitrage Fund	0.14	0.47	3.18	7.03	6.23	5.15
Balanced Advantage	0.47	-3.17	-6.39	3.14	10.71	11.40
Aggressive Hybrid Fund	0.62	-4.56	-8.87	4.08	13.06	15.55
Equity Savings	0.33	-1.62	-1.48	5.87	8.96	9.83
Conservative Hybrid Fund	0.28	-1.11	-0.27	6.46	8.44	8.81
Multi Asset Allocation	0.36	-2.96	-4.76	6.04	13.14	17.20

Less than 1 yr return are absolute and greater than 1 yr returns are CAGR

Source: MFI 360 Explorer

Event	Date
WPI Inflation (Feb 2025)	17-Mar-25
Money Supply	19-Mar-25
Credit Growth	21-Mar-25
Deposit Growth	21-Mar-25
Infrastructure Output	28-Mar-25
Fiscal deficit (as a % of budget estimates)	28-Mar-25