



02 May 2025

INDIAN EQUITY MARKET

- Indian equity markets gave up their initial gains and closed with minor gains amid profit booking as concerns over a possible recession in the U.S. and tensions along the India-Pakistan border hit investor sentiment.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.32% and 0.05% to close at 80,501.99 and 24,346.70 respectively.
- On the BSE sectoral front, Oil & Gas was the major gainer, up 0.69% followed by Energy, up 0.57% and Information Technology, up 0.45%. Telecommunication was the major loser, down 2.06% followed by Consumer Durables, down 1.66% and Power, down 0.96%.
- The overall market breadth on BSE was weak with 1,702 scrips advancing and 2,244 scrips declining. A total of 139 scrips remained unchanged.

CORPORATE NEWS

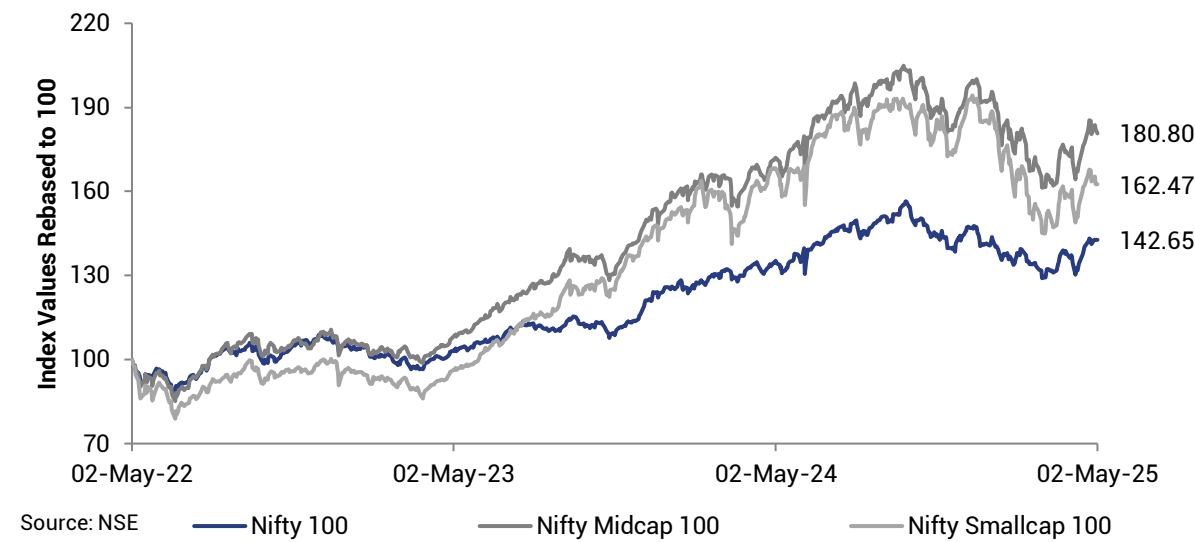
- Marico, a leading player in the FMCG sector, announced an 8% increase in its consolidated net profit for the fourth quarter ending Mar 2025, amounting to Rs. 343 crore compared to Rs. 318 crore in the same period last year.
- Indian Overseas Bank (IOB) announced a 30% increase in its standalone net profit for the fourth quarter of FY25, reaching Rs. 1,051 crore compared to Rs. 810 crore in the same period last year.
- Newgen Software has announced a consolidated net profit increase of 2.8% for the quarter ending Mar 31, 2025, amounting to Rs. 108.3 crore, driven by higher revenues. In the same quarter of the previous fiscal year, the profit was recorded at Rs. 105.26 crore.
- Phoenix Mills Ltd reported an 18% decrease in consolidated net profit for the Q4FY25, amounting to Rs. 268.82 crore, attributed to reduced income. In the same quarter of the previous year, the net profit was Rs. 326.73 crore.

GLOBAL EQUITY MARKET

- The U.S. equity markets climbed after a key Labor Department report revealed that April job growth significantly surpassed economists' expectations.
- European equity markets closed higher, with major indices posting strong gains. This was driven by easing U.S.-China trade tensions and positive U.S. non-farm payroll data. China signaled openness to discussions, urging the U.S. to cancel unilateral tariffs. Investors also reviewed regional economic data and earnings updates.
- Asian equity markets rose after China announced it is evaluating the possibility of trade talks with the U.S., raising hopes of a de-escalation in the trade war. Today (as on May 04), most Asian equity markets were closed for public holidays, while Australian markets fell in early trade due to recent political updates.

INDIAN DERIVATIVES MARKET

- Nifty May 2025 Futures stood at 24,400.70, a premium of 54.00 points above the spot closing of 24,346.70. The turnover on NSE's Futures and Options segment fell to Rs.8,278.45 crore on May 02, 2025, compared with Rs. 3,34,205.92 crore on April 30, 2025.
- The NSE Put-Call ratio stood at 0.86 compared with the previous session's close of 1.01.



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	24,347	0.05	4.35	7.50	2.97	26,277	21,744	21.95	21.78
Nifty 100	24,849	0.02	3.96	5.56	1.44	27,336	22,177	21.94	22.36
Nifty 500	22,006	-0.11	3.48	4.38	-1.65	24,573	19,520	24.06	23.55
Nifty Midcap 100	53,705	-0.78	3.17	5.07	-6.11	60,926	46,866	32.53	29.35
Nifty Smallcap 250	15,354	-0.03	1.15	-3.12	-13.51	18,688	13,315	30.03	24.82
Nifty SME Emerge	13,552	-0.29	3.42	4.95	-18.40	17,224	11,930	31.72	56.97

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	22,287	-0.10	4.10	-1.97	-2.40	27,696	19,317	21.74	31.65
Nifty Bank	55,115	0.05	7.34	11.95	8.37	56,099	46,447	13.98	15.93
Nifty FMCG	56,252	-0.34	4.75	3.23	-0.96	66,439	50,199	44.78	43.50
Nifty IT	35,892	0.27	-1.08	8.10	-17.18	46,089	30,919	26.90	28.44
Nifty Media	1,521	0.49	0.25	-18.34	-16.31	2,182	1,344	NA	577.03
Nifty Metal	8,518	-0.74	-6.19	-8.20	-1.52	10,322	7,690	19.78	20.12
Nifty Pharma	21,627	-0.67	3.22	13.09	-7.62	23,908	18,407	32.60	34.33
Nifty Realty	882	-0.49	3.15	-9.37	-16.23	1,150	766	42.78	50.70
Nifty Energy	34,139	-0.30	2.02	-16.33	-2.98	45,022	29,313	15.95	13.34

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	26,152	0.15	5.66	19.56	11.22	26,819	20,667	17.27	17.75
Nifty India Consumption	11,282	-0.31	4.20	7.83	-0.71	13,058	10,091	42.95	42.62
Nifty Infrastructure	8,795	0.10	4.27	1.90	3.91	9,704	7,590	24.37	20.81
Nifty MNC	26,905	-0.41	3.08	-1.43	-3.68	32,841	23,981	34.27	45.24
Nifty Public Sector Enterprise	9,529	-0.31	2.30	-6.78	-0.03	11,815	7,956	12.43	9.67

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	20,103	1.60	2.66	14.60	-4.33	22,223	16,542	35.82	27.49
Nasdaq Composite	17,978	1.51	2.14	13.49	-6.90	20,205	14,784	19.75	20.93
FTSE 100	8,596	1.17	-0.14	5.19	5.18	8,909	7,545	15.06	11.75
CAC 40	7,770	2.33	-1.12	-1.82	5.28	8,259	6,764	16.52	12.61
DAX	23,087	2.62	3.11	29.00	15.96	23,476	17,025	15.72	13.49
Nikkei	36,831	1.04	3.09	-3.68	-7.68	42,427	30,793	20.86	17.90
Hang Seng	22,505	1.74	-3.01	23.60	12.19	24,874	16,441	11.15	9.88
SSE Composite Index ^[1]	3,279	-0.23	-2.12	5.61	-2.17	3,674	2,690	12.00	12.12

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

F&O Trends	Px Last	Previous	Change %
Near Futures	24,400.70	24,418.40	-0.07
Near Basis	54.00	84.20	-35.87
Mid Futures	24,507.30	24,520.50	-0.05
Mid Basis	160.60	186.30	-13.80
Near Open Interest (Cr.)	1.29	1.33	-3.09
Mid Open Interest (Cr.)	0.16	0.16	0.51
Rollover (%)	12.19	11.61	5.00

Source: NSE

Transaction Trends (Equity)					
Amount in ₹ Cr.					
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	25,357	25,184	173	173	-112,177
Mutual Funds**	10,012	8,909	1,103	15,030	127,163

*As on 2nd May 2025;**As on 29th April 2025; Source: SEBI, NSDL

^[1]Data as on 30 Apr, 2025

INDIAN ECONOMY

- The total gross Goods and Services Tax (GST) revenue grew by 12.6% YoY, reaching a record high of Rs. 2.37 lakh crore in Apr 2025, compared to Rs. 2.10 lakh crore in Apr 2024.
- The Manufacturing Purchasing Managers' Index improved to 58.2 in Apr 2025 compared to 58.1 in Mar 2025, supported by exports and accompanied by a notable improvement in employment.
- According to the RBI data, even after the withdrawal of Rs. 2000 notes in May 2023, Rs. 6,266 crore worth of these notes are still in circulation as of Apr 30, 2025, indicating that 98.24% of the notes have been returned.

INDIAN DEBT MARKET

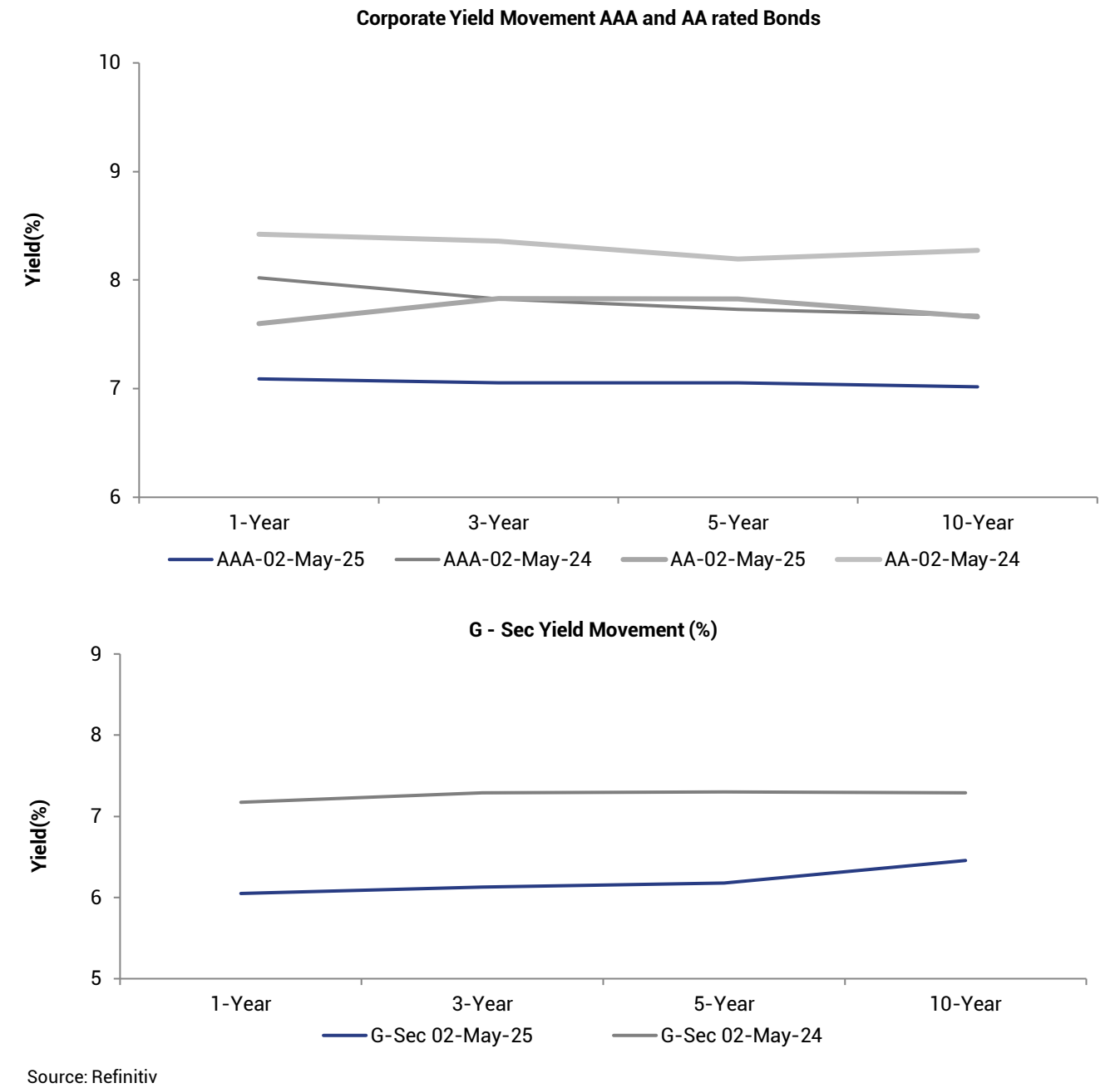
- Bond yields mostly remained steady, while the RBI conducted the auction of a new 10-year government bond which will replace the existing benchmark bond in coming weeks.
- Yield on the 10-year benchmark paper (6.79% GS 2034) was unchanged to close at 6.36% as compared to the previous session's close.
- Reserve Bank of India conducted the auction of two government securities namely 6.64% GS 2027 and New GS 2035 for a notified amount of Rs. 36,000 crore, for which full amount was accepted. The cut off price/implicit yield at cut-off for 6.64% GS 2027 and New GS 2035 stood at Rs. 101.49/6.0080% and 6.33%, respectively.
- Reserve Bank of India announced the auction of 91 days, 182 days and 364 days Treasury Bills for an aggregate amount of Rs. 19,000 crore. The auction would be carried out on May 7, 2025.
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MONEY MARKET

- Data from Reserve Bank of India showed that India's foreign exchange reserves increased to \$688.13 billion for the week ended Apr 25, 2025 compared with \$686.15 billion a week earlier

SPREAD ANALYSIS

- Yields on gilt were unchanged or moved by 1 bps across the maturities, barring 1 & 2 year papers that fell by 4 & 2 bps, respectively, and 7 year paper that rose by 9 bps.
- Corporate bond yields increased up to 3 bps across the curve, barring 1 to 3 & 10 year papers that fell by 1 or 2 bps.



Key Indicators	Current	Previous
GDP (Q3 FY'25)	6.20%	5.60%
IIP (Mar'25)	3.00%	2.70%
Manufacturing PMI Apr'25	58.20	58.10
Credit Growth (Apr 18,2025)	10.30%	11.00%
Deposit Growth (Apr 18,2025)	10.20%	10.10%
WPI (Mar'25)	2.05%	2.38%
CPI (Mar'25)	3.34%	3.61%
Current Account Deficit (Q3 of FY25, in \$ Billion)	11.50	16.70
Fiscal Deficit (Apr to Feb 2025, as a % of Budget Estimates)	79.91	69.39
Trade Deficit (In \$ billion-Mar25)	21.54	14.05

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 (%)	02-May-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	6.00	6.00	6.25	6.50
CRR	4.00	4.00	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	02-May-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.95	5.95	6.33	6.63
CALL	5.90	5.86	6.19	6.53
T-Repo	5.76	5.76	5.75	6.41
OIS- 3 M	5.86	5.92	6.09	6.77
OIS- 6 M	5.71	5.80	6.04	6.81

Source: FBIL

Certificate of Deposit (%)	02-May-25	Week Ago	Month Ago	Year Ago
3-Month	6.49	6.45	6.84	7.24
6-Month	6.66	6.62	6.96	7.36
9-Month	6.69	6.68	7.01	7.54
12-Month	6.79	6.78	7.11	7.49

Source: Refinitiv

Commercial Paper (%)	02-May-25	Week Ago	Month Ago	Year Ago
3-Month	6.58	6.53	6.83	7.31
6-Month	6.72	6.70	6.95	7.56
12-Month	6.80	6.81	7.10	7.73

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	5.96	6.00	--	7.05	-4	NA	-109
3 Yr GOI Bond	6.04	6.05	--	7.16	-1	NA	-113
5 Yr GOI Bond	6.09	6.09	--	7.17	0	NA	-109
10 Yr GOI Bond	6.36	6.36	--	7.16	0	NA	-81
15 Yr GOI Bond	6.45	6.45	--	7.20	0	NA	-75
US 10 Yr Treasury	4.32	4.23	4.20	4.57	9	13	-25

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	02-May-25	1 Month Avg.	1 Year Avg.	02-May-25	1 Month Avg.	1 Year Avg.
1 Yr	104	103	83	155	151	136
3 Yr	92	91	64	170	161	125
5 Yr	88	84	57	165	154	106
10 Yr	56	56	45	120	117	99

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	02-May-25	Week Ago	Month Ago	Year Ago
Govt Securities	75,748	84,635	104,398	52,988
Call Money	14,815	14,475	16,355	10,207
T-Repo	388,067	405,722	425,751	305,939
LAF	NA	NA	NA	NA
Treasury Bills	2,227	2,887	23,573	11,109
Interbank Liquidity	NA	NA	NA	NA

Source: Refinitiv

Transaction Trends (Debt)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	938	2,003	-1,065	-1,065	-13,600
Mutual Funds**	6,934	15,304	-8,370	-9,209	-207,938

*As on 2nd May 2025;**As on 29th April 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: April 28-May 2 ,2025	36,000	36,000	100.00%
Month: Apr 2025	161,000	161,000	100.00%
H1: Apr 25-Sep 25	800,000	161,000	20.13%

Source: RBI

^[1]Data as on 30 Apr, 2025

GLOBAL ECONOMY

- The U.S. non-farm payroll employment increased by 1 77,000 jobs in Apr 2025, a decrease from the 185,000 jobs added in Mar 2025, as reported by the Labor Department.
- Eurozone's harmonized index of consumer prices grew 2.2% YoY in Apr 2025, maintaining the same rate of growth observed in Mar 2025, as reported by Eurostat.
- Hong Kong's Gross domestic product advanced 3.1% YoY in the first quarter ending Mar 2025, surpassing the 2.5% growth recorded in the fourth quarter ending Dec 2024, as reported by the Census and Statistics Department.

INTERNATIONAL MARKET UPDATE

- The U.S. factory orders increased by 4.3% in Mar 2025, following a downwardly adjusted rise of 0.5% in Feb 2025, as reported by the Commerce Department.

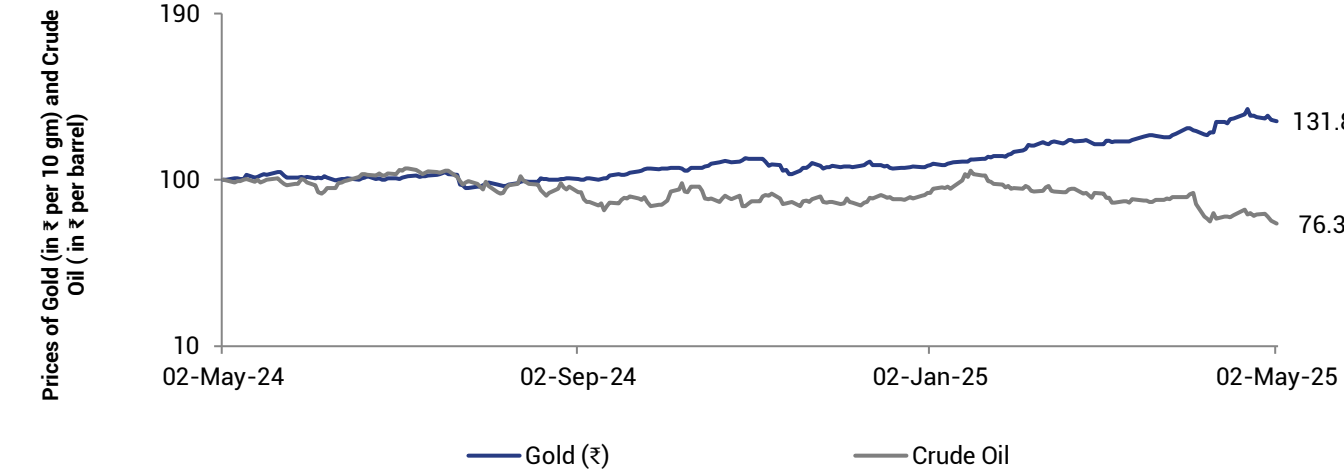
COMMODITY MARKET

- Gold prices fell as easing trade tensions and a strong jobs report reduced the appeal of this safe-haven investment.
- Brent crude oil prices (spot) fell ahead of an OPEC+ meeting.

CURRENCY UPDATE

- The Indian rupee fell in spot trade against the U.S. dollar due to rising demand for the greenback.
- The euro surged against the U.S. dollar despite data showing that the world's largest economy added more new jobs than expected in Apr 2025.

CRUDE OIL VS. GOLD (IN ₹)



^[1]Data as on 30 Apr, 2025

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,240	-0.01	3.40	40.67	23.49	3,424	2,293
Silver (\$/oz)	32	-1.30	-6.02	19.80	10.76	35	27
NYMEX Crude(\$/bbl)	59	-1.52	-17.43	-26.02	-17.79	85	59
Brent Crude(\$/bbl)	62	-0.44	-21.67	-28.27	-19.47	90	62
Baltic Dry Index	1,421	0.71	-10.23	-19.90	42.53	2,203	715
Core Commodity Index	354	0.29	-7.09	6.89	-0.75	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.	53.50	51.60	55.40	54.00	52.10
Euro Zone	50.90	50.20	49.60	49.60	50.30
Germany	51.30	50.40	48.00	47.50	47.70
France	48.00	45.10	47.50	48.60	48.30
U.K.	51.50	50.50	50.40	52.60	52.80
Japan	51.10	48.90	51.10	49.60	52.30
China	51.80	51.50	51.40	50.30	52.70

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	93,577	-0.37	3.10	31.80	23.27	98,228	67,884
Silver (1 kg)	94,156	0.19	-5.39	18.44	9.67	100,693	78,617
Crude Oil (1 bbl)	5,039	-2.12	-17.30	-23.63	-16.94	7,249	1,277
Natural Gas (1 mmbtu)	296	2.57	-12.48	83.33	-12.04	392	138
Aluminium (1 kg)	235	-0.13	-4.07	-0.21	-3.26	267	209
Copper (1 kg)	841	0.28	-5.74	-1.04	5.41	934	772
Nickel (1 kg)	1,330	-1.59	-5.14	-16.46	-0.61	1,783	1,276
Lead (1 kg)	181	-0.63	-1.82	-7.10	-3.73	202	179
Zinc (1 kg)	250	-0.93	-7.76	-3.01	-12.26	301	241
Mentha Oil (1 kg)	989	-0.69	-1.17	-2.49	-0.57	1,023	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	84.58	0.11	-1.07	1.33	-1.21	87.95	82.95
EUR/INR	95.44	-0.06	2.90	6.66	7.75	98.77	87.29
GBP/INR	112.14	-0.16	0.91	7.26	4.77	114.54	103.88
YEN(100)/INR	58.28	0.22	1.81	7.34	7.10	60.83	51.52
SGD/INR	65.09	0.97	2.67	5.73	3.92	65.64	61.26

Source: Refinitiv

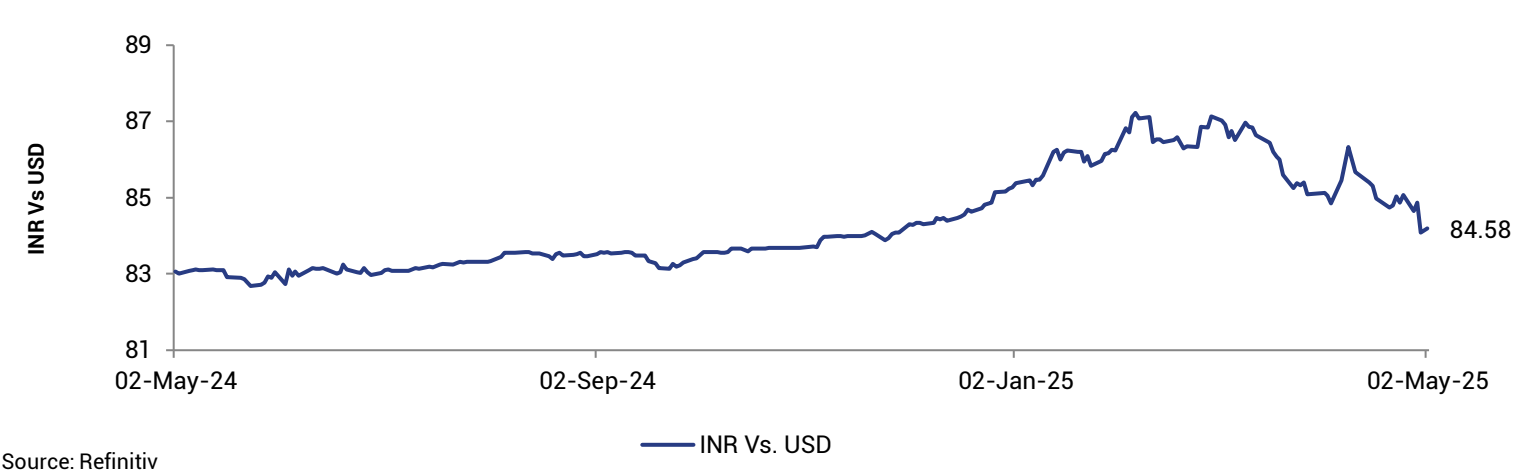
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.13	0.04	4.05	5.31	9.10	1.16	1.01
GBP/USD	1.33	-0.06	2.05	5.91	6.07	1.34	1.21
USD/JPY	144.93	-0.34	-2.89	-5.66	-7.79	161.99	139.56
SGD/USD	0.77	1.06	3.84	4.41	5.25	0.78	0.73
Dollar Index	100.03	-0.22	-3.64	-5.00	-7.80	110.18	97.92

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	84.59	-0.11	-1.50	-1.33	-2.53
Future 3 Month	84.61	-0.57	-1.60	-1.70	-2.93
Future 6 Month	85.34	-0.17	-1.01	-1.39	-2.26
NDF 1 Month	84.75	-0.11	-1.30	-1.17	-2.39
NDF 3 Month	85.08	-0.12	-1.46	-1.18	-2.47
NDF 6 Month	85.54	-0.15	-1.52	-1.27	-2.36

Source: Refinitiv

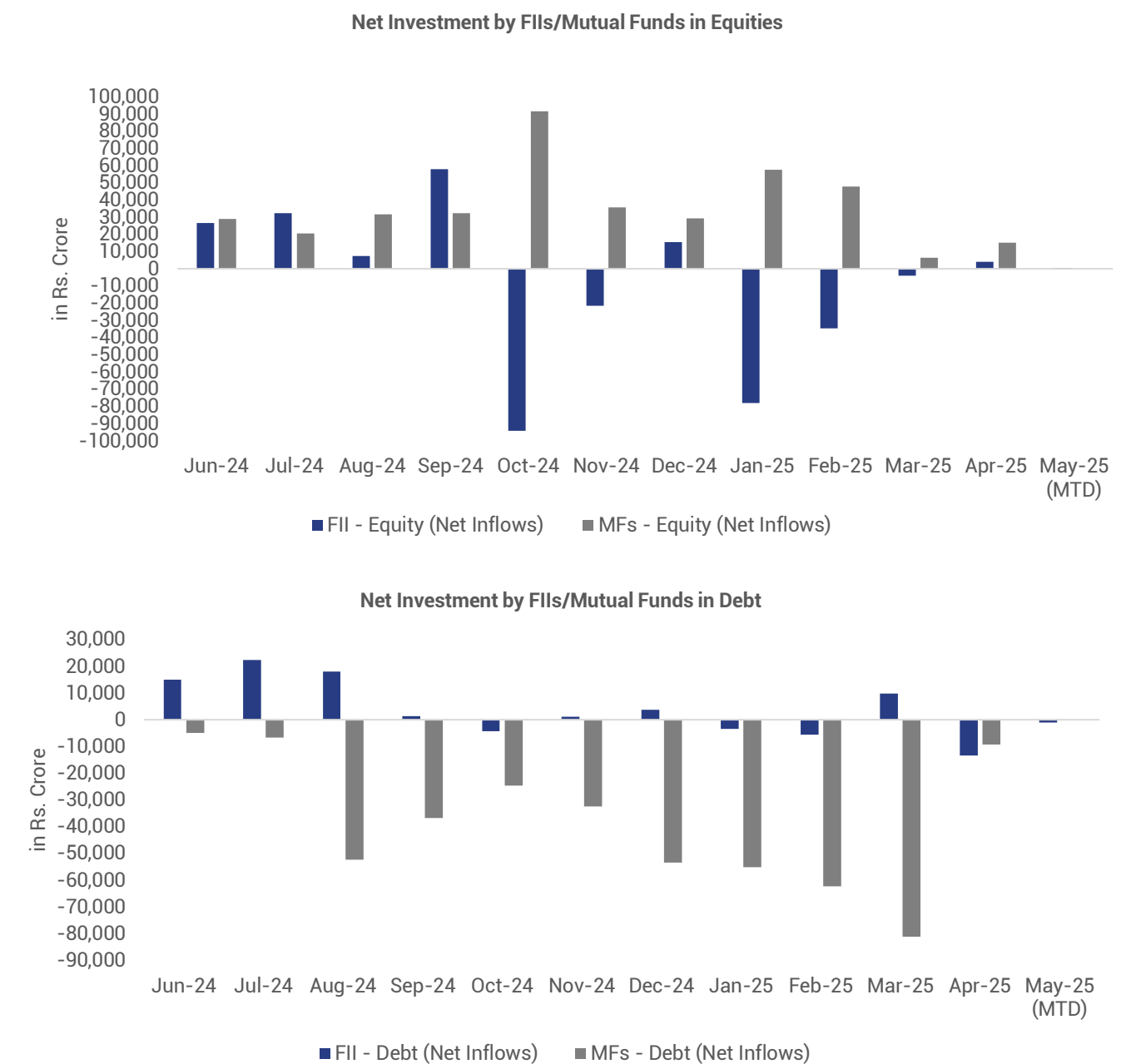
RUPEE VS. U.S. DOLLAR



MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 10,011.78 crore as against sale of Rs. 8,909.27 crore as on Apr 29, 2025. This led to a net purchase of Rs. 1,102.51 crore compared with a net purchase of Rs. 3,307.50 crore on Apr 28, 2025.
- Mutual funds bought debt worth Rs. 6,933.98 crore as against sale of Rs. 15,304.29 crore as on Apr 29, 2025. This led to a net sale of Rs. 8,370.31 crore compared with a net sale of Rs. 5,390.49 crore on Apr 28, 2025.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Reserve Money	07-May-25
Currency in Circulation	07-May-25
Forex Reserves	09-May-25
Loans and Advances to Central Government	09-May-25
Loans and Advances to State Government	09-May-25
CPI Inflation (Apr 2025)	12-May-25

^[1]Data as on 30 Apr, 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	0.81	3.49	-1.48	6.22	14.67	20.23
Mid Cap Fund	0.41	2.24	-7.03	5.17	19.21	28.29
Large & Mid Cap Fund	0.49	2.67	-4.36	6.03	17.20	24.43
Small Cap Fund	-0.96	0.91	-12.40	0.88	17.69	32.63
Multi Cap Fund	0.19	2.34	-5.82	4.37	18.24	25.87
Focused Fund	0.50	2.86	-4.04	5.54	15.25	21.31
Value Fund	0.45	2.57	-5.77	3.85	18.77	26.22
Contra Fund	0.57	2.98	-4.24	6.20	20.44	28.16
ELSS	0.23	3.01	-5.45	4.33	16.09	24.37
Sectoral	0.28	2.97	-3.63	7.25	18.42	25.32
Thematic	0.42	2.36	-6.50	3.65	17.21	23.46
Dividend Yield Fund	0.39	2.36	-5.39	3.96	18.44	26.16

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	5.71	5.75	6.30	6.47	6.26	4.99
Liquid Fund	5.68	6.50	7.14	7.20	6.74	5.37
Ultra Short Duration Fund	5.51	7.53	7.35	7.24	6.48	5.52
Low Duration Fund	9.23	9.91	8.07	7.87	6.71	6.30
Money Market Fund	6.20	8.85	8.01	7.72	6.88	5.79
Short Duration Fund	370.59	105.87	25.14	16.75	8.68	7.80
Medium Duration Fund	8.57	13.61	10.21	9.93	7.51	7.36
Medium to Long Duration Fund	6.16	14.70	10.56	10.37	7.45	6.18
Long Duration Fund	8.83	17.33	11.63	12.64	8.78	6.36
Corporate Bond Fund	9.95	14.14	9.89	9.56	7.05	6.64
Gilt Fund	7.47	16.67	11.53	11.43	7.87	6.16
Gilt Fund with 10 year constant duration	10.44	18.78	12.95	12.14	8.35	6.21
Dynamic Bond	7.86	15.91	10.85	10.86	7.64	6.44
Banking and PSU Fund	7.22	12.76	9.51	9.23	7.00	6.49
Floater Fund	5.52	12.63	9.31	9.21	7.37	6.69
Credit Risk Fund	49.17	20.82	13.19	11.25	8.09	9.51

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	0.05	0.63	3.57	7.28	6.51	5.23
Balanced Advantage	0.42	2.15	-0.36	5.90	11.52	13.58
Aggressive Hybrid Fund	0.50	2.75	-1.58	7.06	13.91	19.24
Equity Savings	0.26	1.60	1.86	7.51	9.47	11.43
Conservative Hybrid Fund	0.26	1.53	2.99	8.97	9.01	10.27
Multi Asset Allocation	0.04	2.08	0.30	7.65	13.96	19.81

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

Source: MFI 360 Explorer

Event	Date
WPI Inflation (Apr 2025)	14-May-25
Money Supply	14-May-25
Credit Growth	16-May-25
Deposit Growth	16-May-25
Infrastructure Output	30-May-25
Fiscal deficit (as a % of budget estimates)	30-May-25