



25 June 2025

INDIAN EQUITY MARKET

- Indian equity markets advanced, driven by easing geopolitical tensions in the Middle East and a decline in crude oil prices. The Iran-Israel ceasefire held firm, and measured remarks from the U.S. Federal Reserve Chair led investors to anticipate two rate cuts by the Fed before the end of 2025.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.85% and 0.8% to close at 82,755.51 and 25,244.75 respectively.
- On the BSE sectoral front, Teck was the major gainer, up 1.69% followed by Information Technology, up 1.68% and Telecommunication, up 1.42%. Capital Goods was the major loser, down 0.54% followed by Oil & Gas, down 0.04%.

CORPORATE NEWS

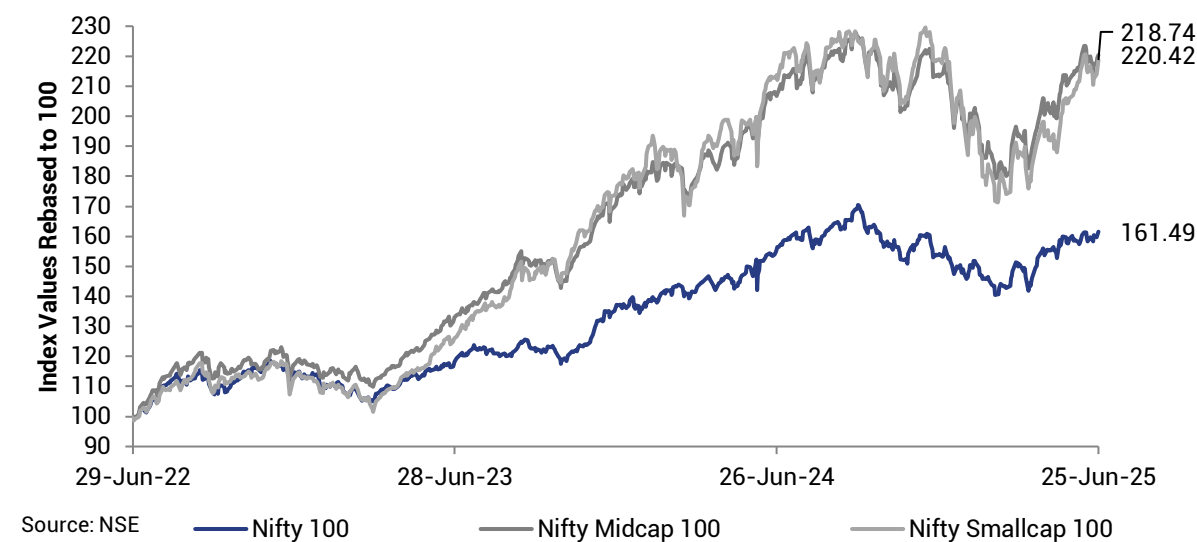
- JSW MG Motor India announced that it will increase the prices of its vehicles by as much as 1.5% for the majority of its products, effective from Jul 1, 2025. This adjustment is being implemented to alleviate the effects of escalating input costs and various macroeconomic factors.
- Star Health and Allied Insurance Company Ltd has collaborated with Medi Assist to provide its customers with claims settlement powered by Artificial Intelligence (AI).
- UNIQLO has revealed plans to open its inaugural store in Bengaluru, scheduled to commence operations on Aug 29, 2025 at Orion Mall, Brigade Gateway.
- The Magnum Ice Cream Company HoldCo 1 Netherlands B.V. has reached an agreement to purchase 61.9% of Kwaliti Wall's (India) (KWI) from the Unilever Group, specifically Hindustan Unilever (HUL).

GLOBAL EQUITY MARKET

- The U.S. equity markets opened higher, extending recent gains, but enthusiasm waned as the session progressed. Caution over Middle East uncertainty prompted profit-taking after indexes hit four-month highs. Markets ended narrowly mixed, reflecting hesitation despite recent momentum.
- European equity markets lost momentum as uncertainty over the Israel–Iran ceasefire lingered. Optimism from U.S.–Iran talks was tempered by caution, with investors shifting focus to the upcoming U.S. tariff pause deadline.
- Asian equity markets extended gains after a sharp rally in the previous session, driven by relief over the Israel-Iran ceasefire. Today (as of June 26), Asian equity markets opened on a mixed note as investors assessed the Israel-Iran ceasefire's impact and awaited further geopolitical and economic updates.

INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 1,010.65, a discount of 24,234.10 points below the spot closing of 25,244.75. The turnover on NSE's Futures and Options segment fell to Rs.6,521.94 crore on June 25, 2025, compared with Rs. 7,54,913.32 crore on June 24, 2025.
- The NSE Put-Call ratio stood at 0.83 compared with the previous session's close of 0.88.



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	25,245	0.80	1.58	6.42	6.77	26,277	21,744	22.69	21.89
Nifty 100	25,822	0.74	1.45	4.30	5.42	27,336	22,177	22.56	22.47
Nifty 500	23,297	0.79	2.26	4.14	4.12	24,573	19,520	24.98	23.75
Nifty Midcap 100	58,882	0.44	3.87	6.35	2.94	60,926	46,866	33.09	30.00
Nifty Smallcap 250	17,456	1.60	5.58	2.32	-1.67	18,688	13,315	33.19	25.41
Nifty SME Emerge	14,657	0.37	3.52	1.36	-11.74	17,224	11,930	33.06	49.61

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	23,828	0.97	1.33	-5.63	4.35	27,696	19,317	24.87	29.84
Nifty Bank	56,621	0.28	2.21	7.63	11.33	57,050	47,703	14.82	15.76
Nifty FMCG	54,747	0.74	-3.11	-2.67	-3.61	66,439	50,199	41.53	43.77
Nifty IT	39,046	1.64	4.39	10.22	-9.90	46,089	30,919	29.18	28.50
Nifty Media	1,763	1.99	4.75	-11.47	-3.01	2,182	1,344	586.79	744.62
Nifty Metal	9,329	0.41	0.86	-5.36	7.85	10,322	7,690	18.94	20.85
Nifty Pharma	21,805	0.61	1.73	11.63	-6.87	23,908	19,121	31.18	34.17
Nifty Realty	1,020	0.54	8.84	-8.59	-3.10	1,141	766	50.70	50.56
Nifty Energy	35,821	0.26	0.51	-11.02	1.80	45,022	29,313	16.51	13.59

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	26,851	0.38	1.38	14.21	14.20	27,087	22,358	17.73	17.71
Nifty India Consumption	11,759	1.22	1.99	6.05	3.49	13,058	10,091	41.36	42.92
Nifty Infrastructure	9,206	0.93	2.20	3.48	8.77	9,704	7,590	24.09	21.26
Nifty MNC	28,498	0.78	1.55	-5.50	2.02	32,841	23,981	34.50	44.25
Nifty Public Sector Enterprise	9,873	-0.41	-0.74	-6.60	3.57	11,815	7,956	12.66	10.06

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	22,238	0.21	6.32	12.88	5.83	22,329	16,542	34.03	28.34
Nasdaq Composite	19,974	0.31	6.60	12.73	3.43	20,205	14,784	31.33	20.69
FTSE 100	8,719	-0.46	0.01	5.71	6.68	8,909	7,545	16.60	11.87
CAC 40	7,558	-0.76	-2.28	-1.36	2.40	8,258	6,764	16.61	13.02
DAX	23,498	-0.61	-0.56	29.27	18.03	24,479	17,025	18.52	23.33
Nikkei	38,942	0.39	4.79	-0.59	-2.39	42,427	30,793	18.78	18.10
Hang Seng	24,475	1.23	3.70	35.42	22.01	24,874	16,441	11.28	9.91
SSE Composite Index	3,456	1.04	3.21	17.15	3.11	3,674	2,690	12.00	12.13

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

F&O Trends	Px Last	Previous	Change %
Near Futures	25,252.20	25,071.70	0.72
Near Basis	7.45	27.35	-72.76
Mid Futures	25,350.20	25,179.10	0.68
Mid Basis	105.45	134.75	-21.74
Near Open Interest (Cr.)	0.54	0.73	-25.80
Mid Open Interest (Cr.)	1.31	1.11	17.88
Rollover (%)	72.49	62.54	15.92

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	15,207	19,543	-4,337	-893	-93,384
Mutual Funds**	10,732	5,536	5,196	45,797	232,061

\*As on 25th June 2025;\*\*As on 23rd June 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- According to data published by the RBI, India's foreign direct investment surged to \$8.8 billion in Apr 2025, a 22% increase YoY, bolstering the RBI's foreign exchange reserves. However, the inflows in non-resident deposits slowed, with banks collectively seeing \$751 million in the first month of the fiscal year compared with \$1.078 billion a year ago.
- The commerce and industry ministry reported that Rs. 21,534 crore has been disbursed under the Production-Linked Incentive (PLI) scheme across 12 sectors. Launched in 2021, the scheme aims to boost domestic manufacturing in 14 sectors with a total outlay of Rs. 1.97 lakh crore.
- The Central Board of Indirect Taxes and Customs has extended the validity of No Objection Certificates for imported alcoholic beverages containing over 10% alcohol, whether bottled at origin or in bulk. This move aligns with FSSAI's clarification permitting a 365-day validity for consignments without expiry dates. Shipments exceeding this period may be revalidated upon inspection and payment of applicable fees.

INDIAN DEBT MARKET

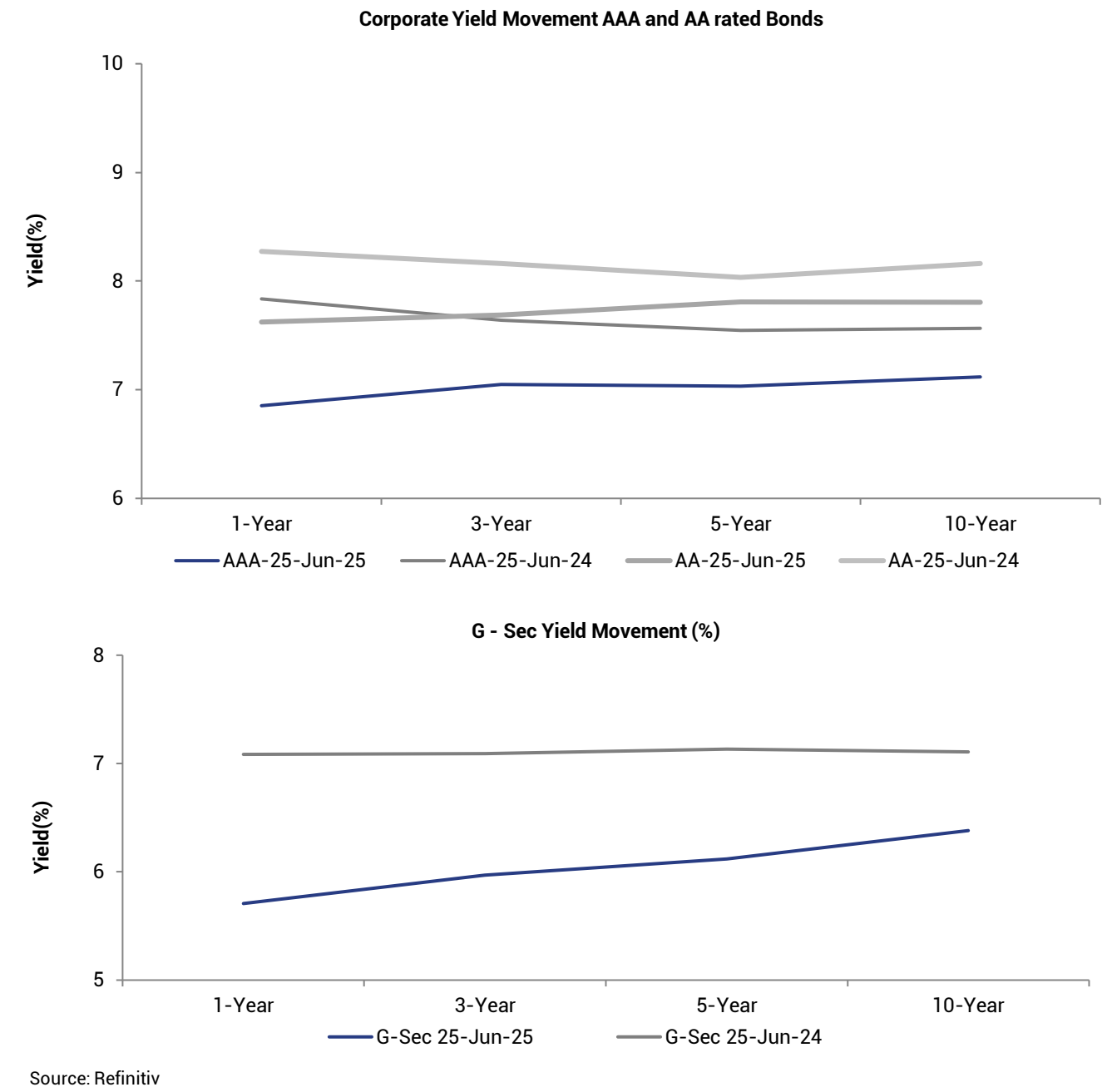
- Bond yields closed higher, primarily driven by an uptick in short-term rates, following the RBI's announcement to absorb surplus liquidity from the banking system this week. The central bank announced to conduct the auction of 7-day Variable Rate Reverse Repo for the notified amount of Rs. 1,00,000 crore on Jun 27, 2025.
- Yield on the 10-year benchmark paper (6.33% GS 2035) rose by 3 bps to close at 6.29% as compared to the previous close of 6.26%.
- Reserve Bank of India conducted the auction of 91 days, 182 days and 364 days Treasury Bills for an aggregate amount of Rs. 19,000 crore for which the full amount was accepted, and the cut-off rate stood at Rs. 98.6693 (YTM: 5.4094%), Rs. 97.3142 (YTM: 5.5350%) and Rs. 94.7387 (YTM: 5.5687%), respectively.

MONEY MARKET

- Data from Reserve Bank of India showed that reserve money grew 4.8% on a yearly basis for the week ended Jun 20, 2025, compared to an increase of 8.6% in the same period of the previous year. The currency in circulation grew 7.0% on a yearly basis for the week ended Jun 20, 2025 compared to an increase of 6.2% in the same period of the previous year.

SPREAD ANALYSIS

- Yields on gilt rose up to 7 bps across the maturities, barring 19 year paper that fell by 2 bps.
- Corporate bond yields fell between 2 to 6 bps across the curve.
- Difference in spread between AAA corporate bond and gilt remained steady or moved by 1 bps across the segments.



Key Indicators	Current	Previous
GDP (Q4 FY'25)	7.40%	6.40%
IIP (Apr'25)	2.70%	3.90%
Manufacturing PMI May'25	57.60	58.20
Credit Growth (May 30,2025)	9.00%	9.80%
Deposit Growth (May 30,2025)	9.90%	10.00%
WPI (May'25)	0.39%	0.85%
CPI (May'25)	2.82%	3.16%
Current Account Deficit (Q3 of FY25, in \$ Billion)	11.50	16.70
Fiscal Deficit (Apr to Apr 2025, as a % of Budget Estimates)	11.06	93.58
Trade Deficit (In \$ billion-May25)	21.88	26.42

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 (%)	25-Jun-25	Week Ago	Month Ago	Year Ago
Reverse Repo	3.35	3.35	3.35	3.35
Repo	5.50	5.50	6.00	6.50
CRR	4.00	4.00	4.00	4.50
SLR	18.00	18.00	18.00	18.00

Source: RBI

Daily Rates (%)	25-Jun-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.33	5.30	5.90	6.61
CALL	5.29	5.27	5.80	6.59
T-Repo	5.25	5.19	5.71	6.50
OIS- 3 M	5.45	5.43	5.65	6.70
OIS- 6 M	5.50	5.45	5.58	6.74

Source: FBIL

Certificate of Deposit (%)	25-Jun-25	Week Ago	Month Ago	Year Ago
3-Month	5.93	6.05	6.21	7.17
6-Month	6.15	6.19	6.53	7.46
9-Month	6.26	6.22	6.48	7.45
12-Month	6.35	6.23	6.59	7.55

Source: Refinitiv

Commercial Paper (%)	25-Jun-25	Week Ago	Month Ago	Year Ago
3-Month	5.92	5.96	6.18	7.22
6-Month	6.20	6.25	6.52	7.48
12-Month	6.43	6.42	6.58	7.70

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	5.63	5.56	5.73	6.96	7	-10	-134
3 Yr GOI Bond	5.88	5.84	5.77	6.97	4	12	-109
5 Yr GOI Bond	6.03	5.99	5.85	7.01	4	17	-98
10 Yr GOI Bond	6.28	6.26	6.21	6.98	2	7	-70
15 Yr GOI Bond	6.64	6.62	6.39	7.01	3	25	-37
US 10 Yr Treasury	4.29	4.29	4.51	4.24	0	-22	6

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	25-Jun-25	1 Month Avg.	1 Year Avg.	25-Jun-25	1 Month Avg.	1 Year Avg.
1 Yr	115	119	89	192	188	144
3 Yr	108	111	73	172	175	135
5 Yr	92	102	66	169	169	118
10 Yr	74	78	50	143	134	104

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	25-Jun-25	Week Ago	Month Ago	Year Ago
Govt Securities	54,185	55,103	73,698	61,778
Call Money	16,776	15,058	17,872	15,147
T-Repo	409,038	398,471	407,410	408,239
LAF	NA	NA	NA	NA
Treasury Bills	10,757	15,286	3,095	10,367
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*	415	612	-198	-6,179	901
Mutual Funds**	13,710	14,414	-704	-28,828	-326,056

\*As on 25th June 2025;\*\*As on 23rd June 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: June 23-27 ,2025	36,000	0	N.A
Month: Jun 2025	125,000	84,000	45.60%
H1: Apr 25-Sep 25	800,000	365,000	42.25%

Source: RBI



GLOBAL ECONOMY

- The U.S. new home sales fell by 13.7% to an annual rate of 623,000 in May 2025, following a significant increase of 9.6% to a revised rate of 722,000 in Apr 2025, as reported by the Commerce Department.

INTERNATIONAL MARKET UPDATE

- The U.S. crude oil inventories decreased by 5.8 million barrels for the week ending Jun 20, 2025, following a significant drop of 11.5 million barrels in the preceding week, as reported by the Energy Information Administration.

COMMODITY MARKET

- Gold prices steadied as investors awaited key U.S. data, while the Israel–Iran ceasefire eased safe-haven demand.
- Brent crude oil prices (spot) declined after a steep selloff triggered by the Iran–Israel ceasefire.

CURRENCY UPDATE

- The Indian rupee declined in spot trading despite positive trends in domestic equities.
- The euro weakened against the U.S. dollar amid concerns over tensions in the Middle East.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,332	0.25	-0.74	43.69	27.00	3,432	2,298
Silver (\$/oz)	36	1.10	8.42	25.54	25.72	37	27
NYMEX Crude(\$/bbl)	66	0.81	5.09	-19.53	-8.93	85	58
Brent Crude(\$/bbl)	72	-0.61	8.60	-18.45	-5.89	90	62
Baltic Dry Index	1,665	-0.95	24.25	-13.55	67.00	2,179	715
Core Commodity Index	364	-0.10	0.38	6.32	2.06	386	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.	53.00	50.60	51.60	54.90	54.50
Euro Zone	50.20	50.40	50.20	48.30	52.20
Germany	48.50	50.10	50.40	47.20	52.40
France	49.30	47.80	45.10	45.90	48.90
U.K.	50.30	48.50	50.50	50.50	53.00
Japan	50.20	51.20	52.00	50.10	52.60
China	49.60	51.10	51.50	52.30	54.10

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	96,813	0.03	1.68	35.25	27.53	98,931	67,884
Silver (1 kg)	105,109	-0.84	8.52	18.85	22.43	109,174	78,617
Crude Oil (1 bbl)	5,543	-6.79	5.72	-18.69	-8.64	7,249	1,277
Natural Gas (1 mmbtu)	305	-5.11	9.29	29.73	-9.45	392	138
Aluminium (1 kg)	247	-0.54	3.84	6.48	2.06	267	209
Copper (1 kg)	888	0.41	3.25	4.54	11.32	934	772
Nickel (1 kg)	1,308	-0.38	-2.80	-10.63	-2.29	1,783	1,276
Lead (1 kg)	183	-1.11	0.88	-6.02	-2.61	201	179
Zinc (1 kg)	258	-0.14	-1.24	-3.12	-9.28	301	241
Mentha Oil (1 kg)	938	0.02	-4.95	-0.05	-5.69	1,023	916
Cotton (1 bales)	100	0.00	0.00	0.00	0.00	100	100

Source: MCX-SX

CURRENCY MARKET UPDATE

Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
USD/INR	86.08	0.12	1.02	3.17	0.54	87.95	83.36
EUR/INR	100.30	0.57	3.63	12.26	13.24	100.48	87.29
GBP/INR	117.54	0.51	1.96	11.12	9.82	117.63	104.67
YEN(100)/INR	59.22	-0.09	-0.86	13.41	8.82	60.83	51.52
SGD/INR	67.27	0.23	1.48	9.28	7.39	67.61	61.35

Source: Refinitiv

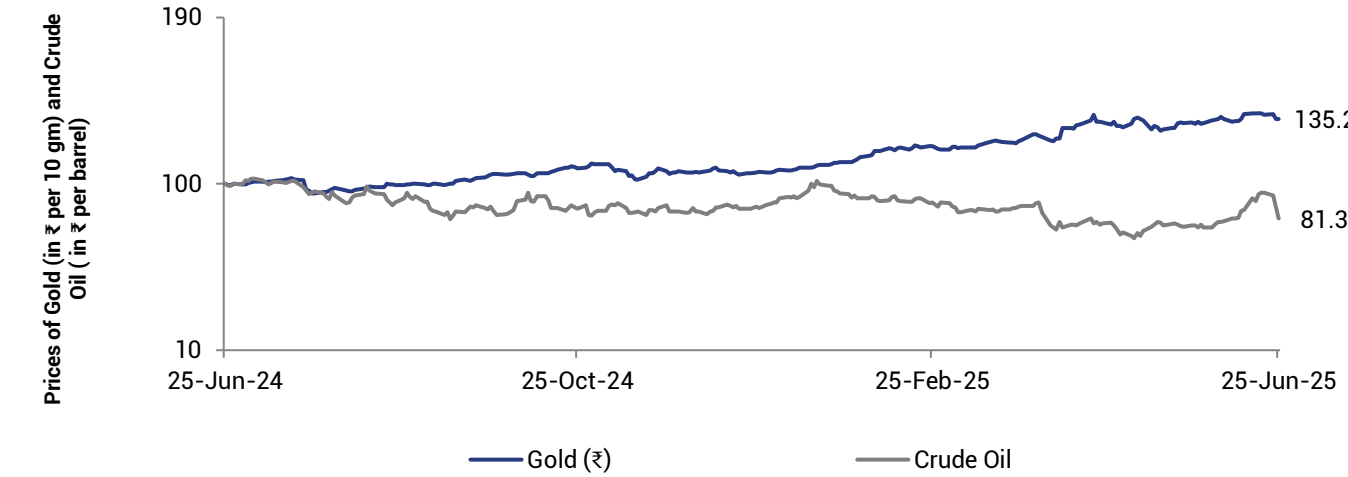
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	0.44	2.60	8.83	12.61	1.17	1.01
GBP/USD	1.37	0.36	0.94	7.73	9.21	1.37	1.21
USD/JPY	145.25	0.23	1.90	-9.04	-7.59	161.99	139.56
SGD/USD	0.78	0.13	0.47	6.00	6.85	0.78	0.73
Dollar Index	97.68	-0.18	-1.45	-7.51	-9.96	110.18	97.60

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	86.08	0.01	0.23	0.86	0.43
Future 3 Month	86.52	0.04	0.62	0.90	0.25
Future 6 Month	87.03	0.05	0.96	0.95	0.59
NDF 1 Month	86.10	0.05	0.27	0.99	0.17
NDF 3 Month	86.34	0.05	0.00	0.90	0.08
NDF 6 Month	86.77	0.09	-0.10	0.93	0.03

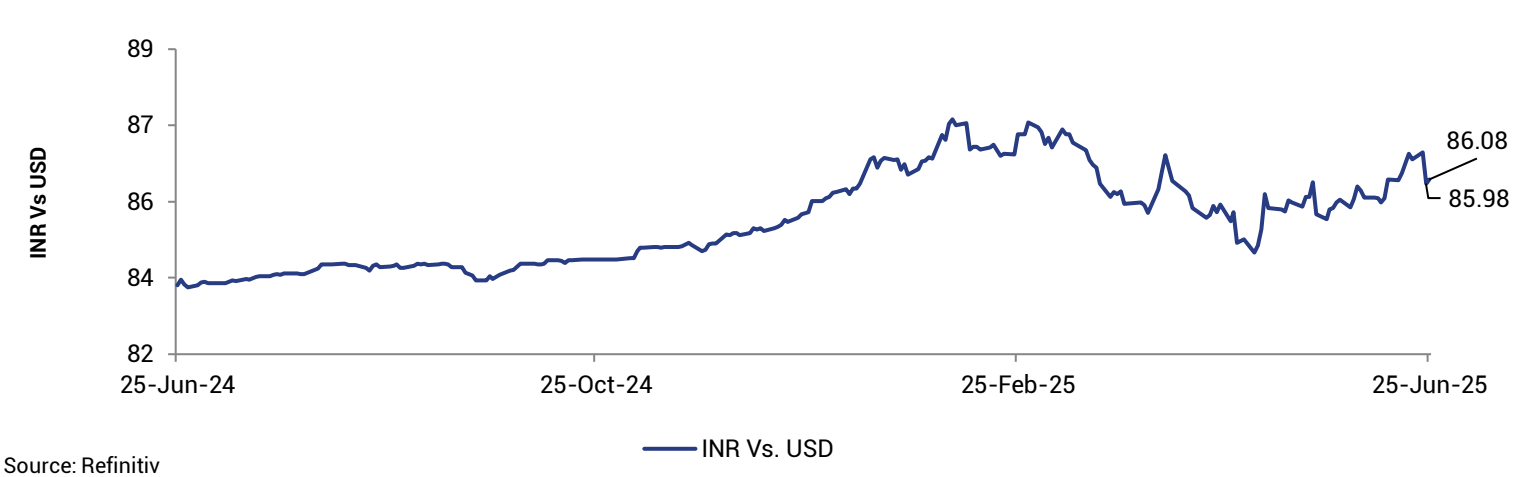
Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



Source: MCX-SX

RUPEE VS. U.S. DOLLAR

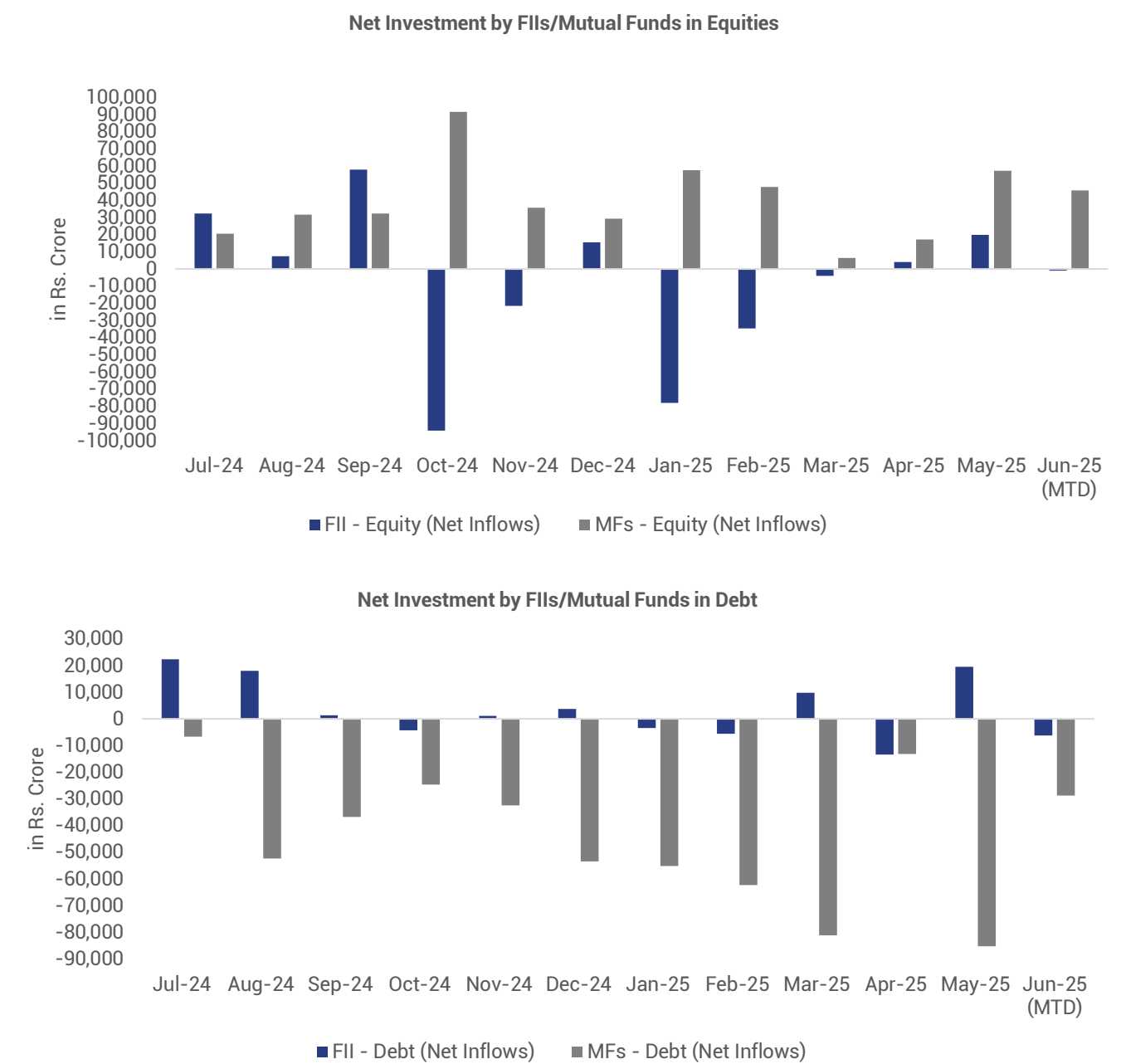


Source: Refinitiv

MUTUAL FUND AND INSURANCE UPDATE

- Several fund houses have renamed their schemes following SEBI's directive to simplify scheme names for better investor clarity. In Mar 2025, SEBI instructed asset managers to revise the names of their equity schemes to make them more accessible, particularly for first-time investors. According to sources, the initiative aims to enhance transparency and consistency in mutual fund offerings for the general public.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Forex Reserves	27-Jun-25
Credit Growth	27-Jun-25
Deposit Growth	27-Jun-25
Loans and Advances to Central Government	27-Jun-25
Loans and Advances to State Government	27-Jun-25
Index of Industrial Production (May 2025)	30-Jun-25

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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	1.68	1.97	3.85	4.94	19.40	20.41
Mid Cap Fund	1.56	4.15	0.81	4.43	27.08	28.70
Large & Mid Cap Fund	1.48	3.01	1.94	5.13	23.64	24.85
Small Cap Fund	1.30	4.36	-2.56	3.29	26.59	33.15
Multi Cap Fund	1.44	3.18	0.98	5.18	24.80	26.48
Focused Fund	1.57	2.52	2.39	4.85	20.78	21.56
Value Fund	1.33	2.11	1.27	2.70	24.93	26.20
Contra Fund	1.37	2.23	1.55	4.39	25.82	27.87
ELSS	1.46	2.90	1.75	4.07	22.36	24.73
Sectoral	1.25	2.45	2.93	7.21	24.69	25.43
Thematic	1.38	2.55	0.16	2.62	22.91	23.57
Dividend Yield Fund	0.88	1.73	1.67	2.23	24.06	25.70

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	5.07	5.27	6.01	6.31	6.33	5.07
Liquid Fund	5.63	6.17	7.03	7.11	6.86	5.44
Ultra Short Duration Fund	5.63	6.76	7.60	7.30	6.73	5.47
Low Duration Fund	5.02	6.53	8.58	7.99	7.10	6.10
Money Market Fund	5.44	7.37	8.37	7.84	7.17	5.73
Short Duration Fund	-0.71	2.66	9.83	8.98	7.48	6.20
Medium Duration Fund	-0.47	0.59	10.23	9.41	8.14	6.96
Medium to Long Duration Fund	-4.62	-7.94	8.96	8.34	7.55	5.61
Long Duration Fund	-6.28	-25.15	6.72	7.06	9.02	5.57
Corporate Bond Fund	-0.67	1.21	10.20	9.31	7.65	6.16
Gilt Fund	-6.01	-18.96	7.77	7.67	7.62	5.48
Gilt Fund with 10 year constant duration	-7.87	-4.96	11.71	10.51	8.95	5.74
Dynamic Bond	-5.31	-10.83	8.83	8.33	7.62	5.91
Banking and PSU Fund	-2.95	0.54	9.80	8.93	7.44	6.01
Floater Fund	3.04	3.38	9.66	9.00	7.82	6.39
Credit Risk Fund	4.26	5.08	13.87	11.17	8.67	9.38

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	0.51	3.28	6.62	6.63	5.31
Balanced Advantage	0.89	1.32	2.90	5.42	14.41	13.59
Aggressive Hybrid Fund	1.15	1.93	3.07	6.00	18.30	19.42
Equity Savings	0.46	0.88	3.30	6.78	11.27	11.37
Conservative Hybrid Fund	0.25	0.19	3.97	7.56	10.29	9.96
Multi Asset Allocation	0.34	1.65	5.31	7.47	17.66	19.74

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

Source: MFI 360 Explorer

Event	Date
Infrastructure Output	30-Jun-25
Fiscal deficit (as a % of budget estimates)	30-Jun-25
Manufacturing output (May 2025)	30-Jun-25
Revenue deficit	30-Jun-25
Tax Revenue	30-Jun-25
Capital Expenditure	30-Jun-25