



03 July 2025

INDIAN EQUITY MARKET

- Indian equity markets slipped from the day's high and ended in the red for the second consecutive session, as investors remained cautious over the progress of ongoing U.S.-India trade negotiations. The selling pressure intensified toward the close, reflecting persistent anxiety surrounding the potential trade agreement, as investors remain focused on developments in the trade talks with the 90-day pause in tariff actions nearing its end.
- Key benchmark indices BSE SENSEX and Nifty 50 lost 0.2% and 0.19% to close at 83,239.47 and 25,405.30 respectively.
- On the BSE sectoral front, Healthcare was the major gainer, up 0.74% followed by Oil & Gas, up 0.45% and Consumer Durables, up 0.43%. Metal was the major loser, down 0.77% followed by Realty, down 0.61% and Telecommunication, down 0.55%.

CORPORATE NEWS

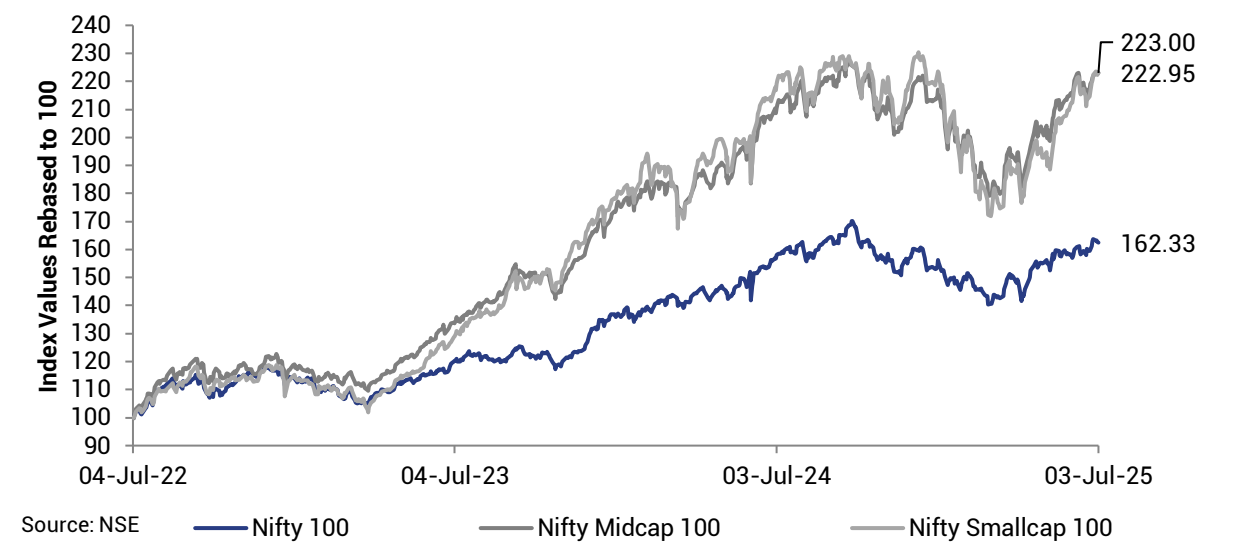
- Carlyle Group intends to sell a stake of up to 10% in Piramal Pharma via block transactions. The estimated sale could reach Rs. 2,600-2,700 crore.
- Oil and Natural Gas Corporation Ltd (ONGC), along with Japan's shipping firm Mitsui OSK Lines Ltd, reached an agreement to construct and manage two sizable vessels.
- Reliance Industries Ltd is set to merge all its consumer goods brands into a newly formed entity called New Reliance Consumer Products Ltd (New RCPL). The organization stated that this spin-off is intended to draw in investors beyond those currently supporting its retail division.
- Tata Power Renewables announced the commissioning of a remarkable 752 megawatts (MW) of solar projects during the period of Apr to Jun 2025-26, resulting in a total operational capacity of 5.6 gigawatts (GW) for its utility-scale projects.

GLOBAL EQUITY MARKET

- The U.S. equity markets advanced as investors welcomed strong job data and an unexpected dip in unemployment. While hopes for rate cuts dimmed, renewed growth in the service sector signaled economic resilience. Market participants reassessed their positioning, balancing signs of strength against evolving monetary policy expectations.
- European equity markets gained on trade optimism, strong U.S. jobs data, and improved political clarity in the U.K., which boosted investor sentiment.
- Asian equity markets closed on a mixed note as investors reacted to the U.S.-Vietnam trade deal and awaited the monthly U.S. nonfarm payroll for Jun 2025. Today (as of July 04), Asian equity markets opened on a mixed note as strong U.S. jobs data lifted global growth sentiment.

INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 25,508.60, a premium of 103.30 points above the spot closing of 25,405.30. The turnover on NSE's Futures and Options segment fell to Rs.5,745.14 crore on July 03, 2025, compared with Rs. 3,34,453.12 crore on July 02, 2025.
- The NSE Put-Call ratio stood at 0.85 compared with the previous session's close of 1.02.



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	25,405	-0.19	3.52	4.61	7.45	26,277	21,744	22.87	21.92
Nifty 100	26,003	-0.25	3.34	2.75	6.15	27,336	22,177	22.70	22.50
Nifty 500	23,522	-0.11	3.57	2.93	5.12	24,573	19,520	25.24	23.79
Nifty Midcap 100	59,683	0.03	3.77	6.02	4.34	60,926	46,866	33.63	30.10
Nifty Smallcap 250	17,758	0.37	4.64	1.51	0.03	18,688	13,315	33.79	25.52
Nifty SME Emerge	14,782	0.16	2.99	-3.13	-10.99	17,224	11,930	32.50	48.83

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	24,005	0.44	3.16	-4.68	5.13	27,696	19,317	25.05	29.63
Nifty Bank	56,792	-0.36	2.14	6.97	11.66	57,628	47,703	15.06	15.75
Nifty FMCG	54,516	0.14	-1.70	-4.66	-4.02	66,439	50,199	41.15	43.79
Nifty IT	38,854	-0.06	5.54	4.13	-10.35	46,089	30,919	28.74	28.51
Nifty Media	1,750	1.45	1.39	-14.80	-3.72	2,182	1,344	604.15	730.52
Nifty Metal	9,623	-0.78	5.49	-3.19	11.26	10,322	7,690	19.55	20.94
Nifty Pharma	22,204	0.42	3.98	11.49	-5.16	23,908	19,121	31.85	34.13
Nifty Realty	963	-0.71	-2.01	-13.53	-8.48	1,141	766	47.90	50.53
Nifty Energy	36,363	0.09	2.29	-12.98	3.34	45,022	29,313	16.18	13.63

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	26,735	-0.47	1.83	11.75	13.70	27,370	22,358	17.71	17.71
Nifty India Consumption	11,835	-0.09	3.99	6.02	4.16	13,058	10,091	41.48	42.96
Nifty Infrastructure	9,400	-0.31	5.49	2.82	11.06	9,704	7,590	24.44	21.32
Nifty MNC	28,882	0.14	2.50	-5.80	3.40	32,841	23,981	34.15	44.10
Nifty Public Sector Enterprise	10,048	0.16	2.52	-7.71	5.41	11,815	7,956	12.89	10.12

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	22,867	0.99	5.56	13.28	8.83	22,896	16,542	34.63	28.53
Nasdaq Composite	20,601	1.02	6.20	13.27	6.68	20,625	14,784	31.96	20.80
FTSE 100	8,823	0.55	0.41	7.98	7.96	8,909	7,545	16.56	11.91
CAC 40	7,755	0.21	-0.12	1.60	5.06	8,258	6,764	16.88	13.11
DAX	23,934	0.61	-0.65	30.26	20.22	24,479	17,025	18.64	23.38
Nikkei	39,786	0.06	6.25	-1.96	-0.27	42,427	30,793	19.04	18.13
Hang Seng	24,070	-0.63	2.37	33.88	19.99	24,874	16,441	11.10	9.92
SSE Composite Index	3,461	0.18	2.95	16.05	3.26	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	25,508.60	25,546.10	-0.15
Near Basis	103.30	92.70	11.43
Mid Futures	25,615.00	25,650.80	-0.14
Mid Basis	209.70	197.40	6.23
Near Open Interest (Cr.)	1.37	1.41	-2.73
Mid Open Interest (Cr.)	0.19	0.17	10.99
Rollover (%)	13.50	12.08	11.74

Source: NSE

Transaction Trends (Equity)					
Amount in ₹ Cr.					
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	15,016	15,764	-747	1,188	-76,712
Mutual Funds**	11,190	8,938	2,253	44,723	230,986

\*As on 3rd July 2025;\*\*As on 30th June 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- India's Services Purchasing Managers' Index (PMI) touched a ten-month high to 60.4 in Jun 2025 from 58.8 in May 2025, aided by robust expansion in international sales and job creation, amid positive demand trends and ongoing improvement in sales. The composite PMI rose to 61 in Jun 2025 from 59.3 in May 2025.
- The Directorate General of Trade Remedies (DGTR) has initiated an anti-dumping investigation into imports of virgin multi-layer paperboard from Indonesia, following a complaint by the Indian Paper Manufacturer Association, which alleges harm to the domestic industry from dumped imports.
- The RBI stated that implementing real-time credit reporting to Credit Information Companies (CICs) would improve underwriting by promptly reflecting borrower actions like loan repayments and closures, thereby enhancing the overall consumer experience. Additionally, the RBI is set to introduce a 'grameen' credit score aimed at expanding financial inclusion for rural communities, especially self-help groups.

INDIAN DEBT MARKET

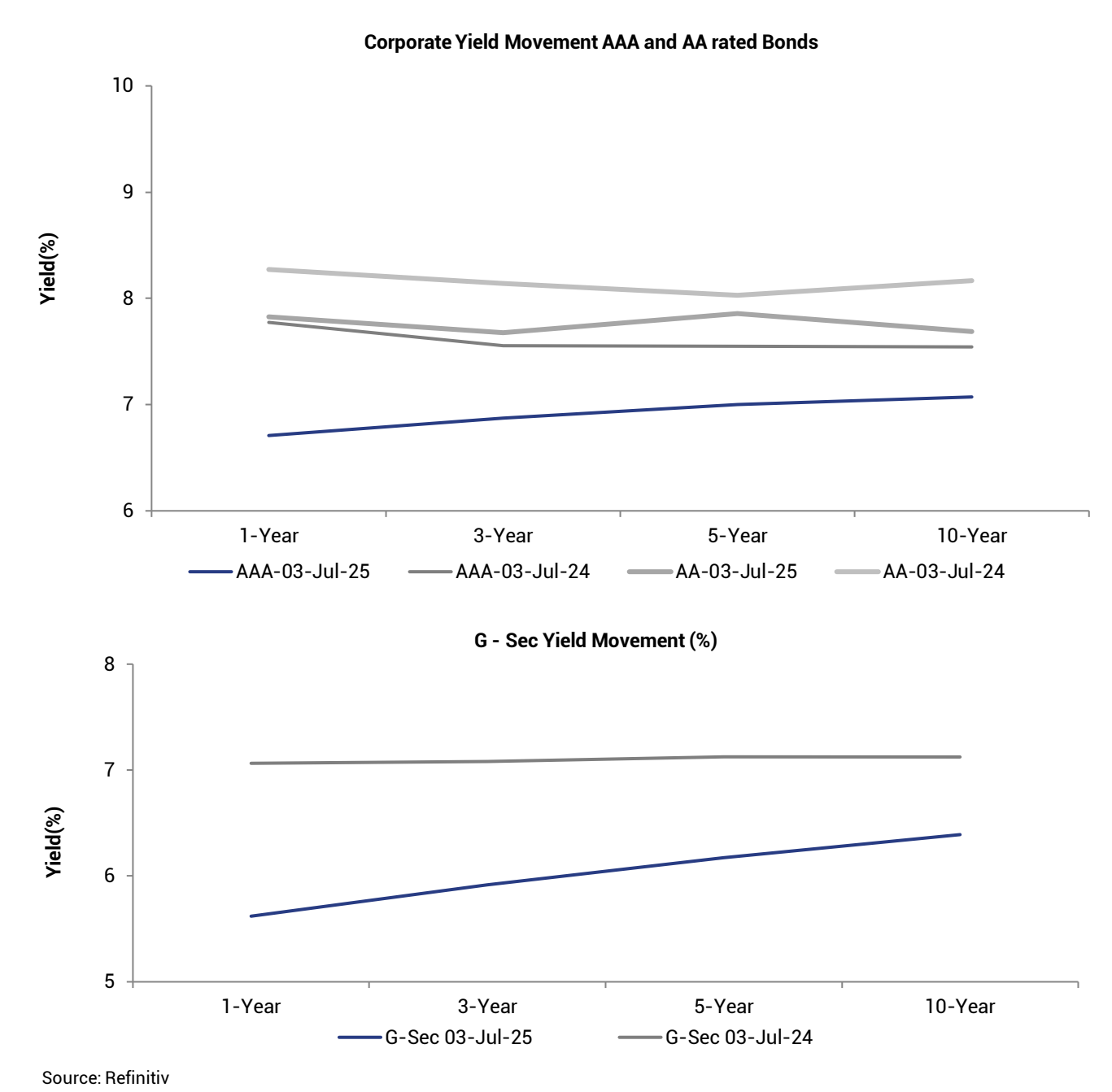
- Bond yields held steady as market participants awaited clearer signals on the RBI's liquidity stance and the key upcoming U.S. jobs report for guidance.
- Yield on the 10-year benchmark paper (6.33% GS 2035) was unchanged to close at 6.29% as compared to the previous day's close.

MONEY MARKET

- RBI announced to conduct the auction of 7-day Variable Rate Reverse Repo for the notified amount of Rs. 1,00,000 crore on Jul 4, 2025.

SPREAD ANALYSIS

- Yields on gilt were unchanged or moved by 1 bps across the maturities, barring 1, 2 & 19 year papers that fell by 2 or 3 bps, and 30 year paper that rose by 2 bps.
- Corporate bond yields fell increased up to 4 bps across the curve, barring 2 year paper that fell by 1 bps, while 3 & 10 year papers were unchanged.



Key Indicators	Current	Previous
GDP (Q4 FY'25)	7.40%	6.40%
IIP (May'25)	1.20%	2.60%
Manufacturing PMI Jun'25	58.40	57.60
Credit Growth (Jun 13,2025)	9.60%	9.00%
Deposit Growth (Jun 13,2025)	10.40%	9.90%
WPI (May'25)	0.39%	0.85%
CPI (May'25)	2.82%	3.16%
Current Account Deficit (Q4 of FY25, in \$ Billion)	-13.50	11.30
Fiscal Deficit (Apr to May 2025, as a % of Budget Estimates)	0.78	11.06
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 (%)	03-Jul-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 (%)	03-Jul-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.30	5.30	5.82	6.55
CALL	5.26	5.27	5.77	6.49
T-Repo	5.12	5.24	5.59	6.34
OIS- 3 M	5.43	5.45	5.62	6.70
OIS- 6 M	5.47	5.49	5.57	6.75

Source: FBIL

Certificate of Deposit (%)	03-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.69	5.94	6.08	6.98
6-Month	5.91	6.16	6.35	7.35
9-Month	6.03	6.24	6.34	7.44
12-Month	6.22	6.33	6.44	7.57

Source: Refinitiv

Commercial Paper (%)	03-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.84	5.92	6.15	7.20
6-Month	6.05	6.20	6.40	7.42
12-Month	6.29	6.43	6.45	7.60

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	5.54	5.58	5.66	6.94	-3	-12	-140
3 Yr GOI Bond	5.83	5.84	5.73	6.96	-1	10	-113
5 Yr GOI Bond	6.08	6.08	5.85	7.00	0	23	-92
10 Yr GOI Bond	6.29	6.29	6.20	7.00	0	9	-71
15 Yr GOI Bond	6.64	6.63	6.42	7.02	1	23	-38
US 10 Yr Treasury	4.34	4.29	4.46	4.35	5	-12	-1

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	03-Jul-25	1 Month Avg.	1 Year Avg.	03-Jul-25	1 Month Avg.	1 Year Avg.
1 Yr	109	119	90	221	201	146
3 Yr	96	111	74	176	176	137
5 Yr	83	100	67	168	169	120
10 Yr	68	79	50	130	136	105

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	03-Jul-25	Week Ago	Month Ago	Year Ago
Govt Securities	47,612	63,379	51,211	34,001
Call Money	17,149	18,328	14,293	12,120
T-Repo	415,519	400,730	394,521	393,537
LAF	NA	NA	NA	NA
Treasury Bills	4,489	4,806	3,911	17,629
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*	105	1,464	-1,359	-129	829
Mutual Funds**	6,523	8,687	-2,165	-32,161	-329,390

\*As on 3rd July 2025;\*\*As on 30th June 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: June 30-Jul 04, 2025	32,000	--	N.A
Month: Jul 2025	157,000	120,000	76.43%
H1: Apr 25-Sep 25	800,000	401,000	50.13%

Source: RBI



GLOBAL ECONOMY

- The U.S. services PMI rose to 50.8 in Jun 2025 from 49.9 in May 2025, according to the Institute for Supply Management. A reading above 50 indicating growth.
- The U.S. non-farm payroll employment rose by 147,000 jobs in Jun 2025, following a revised increase of 144,000 jobs in May 2025, according to the Labor Department.
- China's Caixin services Purchasing Managers' Index registered 50.6 in Jun 2025, down from 51.1 in May 2025, according to S&P Global.

INTERNATIONAL MARKET UPDATE

- The U.S. factory orders spiked by 8.2% in May 2025 after plunging by a revised 3.9% in Apr 2025, according to the Commerce Department.
- Eurozone's HCOB final composite output index increased to 50.6 in Jun 2025 from 50.2 in May 2025, according to the survey results from S&P Global.

COMMODITY MARKET

- Gold prices declined after robust U.S. jobs data lowered expectations for early rate cuts, diminishing investor interest in the metal's safe-haven appeal.
- Brent crude oil prices rose as Iran denied cooperation with U.N. nuclear inspectors, while a U.S.-Vietnam trade deal supported the demand outlook.

CURRENCY UPDATE

- The Indian rupee strengthened in spot trading against the U.S. dollar, supported by weakness in the greenback.
- The euro declined against the U.S. dollar after data showed that the U.S. economy added more jobs than analysts had estimated in the week ended June 28, 2025.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,326	-0.92	-0.77	41.18	26.77	3,432	2,356
Silver (\$/oz)	37	0.65	6.75	20.87	27.55	37	27
NYMEX Crude(\$/bbl)	68	-0.77	6.46	-20.05	-5.96	84	58
Brent Crude(\$/bbl)	72	0.81	4.76	-19.93	-6.14	90	62
Baltic Dry Index	1,434	-0.62	0.28	-30.52	43.83	2,110	715
Core Commodity Index	369	-0.25	1.41	6.76	3.30	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	50.60	50.20	50.90	49.60	50.90
Germany	50.40	48.50	51.30	48.00	50.40
France	49.20	49.30	48.00	47.50	48.80
U.K.	52.00	50.30	51.50	50.40	52.30
Japan	51.50	50.20	48.90	50.50	49.70
China	51.30	49.60	51.80	51.40	52.80

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	96,933	-0.13	0.50	34.68	27.69	98,931	67,884
Silver (1 kg)	107,340	1.26	7.17	20.01	25.03	109,174	78,617
Crude Oil (1 bbl)	5,780	3.14	8.22	-16.43	-4.73	7,249	1,277
Natural Gas (1 mmbtu)	299	2.22	-5.29	46.95	-11.15	392	138
Aluminium (1 kg)	250	0.20	4.82	7.30	3.14	267	209
Copper (1 kg)	902	0.22	3.56	6.02	13.03	934	772
Nickel (1 kg)	1,337	0.47	-0.06	-8.78	-0.10	1,783	1,276
Lead (1 kg)	185	0.71	2.35	-5.94	-1.28	201	179
Zinc (1 kg)	262	0.48	1.30	-5.06	-8.04	301	241
Mentha Oil (1 kg)	936	-1.19	1.87	-2.51	-5.87	1,023	916
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	85.31	-0.46	-0.33	2.13	-0.36	87.95	83.43
EUR/INR	100.39	-0.61	3.05	11.45	13.34	101.17	87.29
GBP/INR	116.60	-0.13	0.68	9.57	8.93	117.95	104.67
YEN(100)/INR	58.93	-1.10	-0.95	14.11	8.28	60.83	51.52
SGD/INR	66.94	-0.48	0.76	8.52	6.86	67.61	61.48

Source: Refinitiv

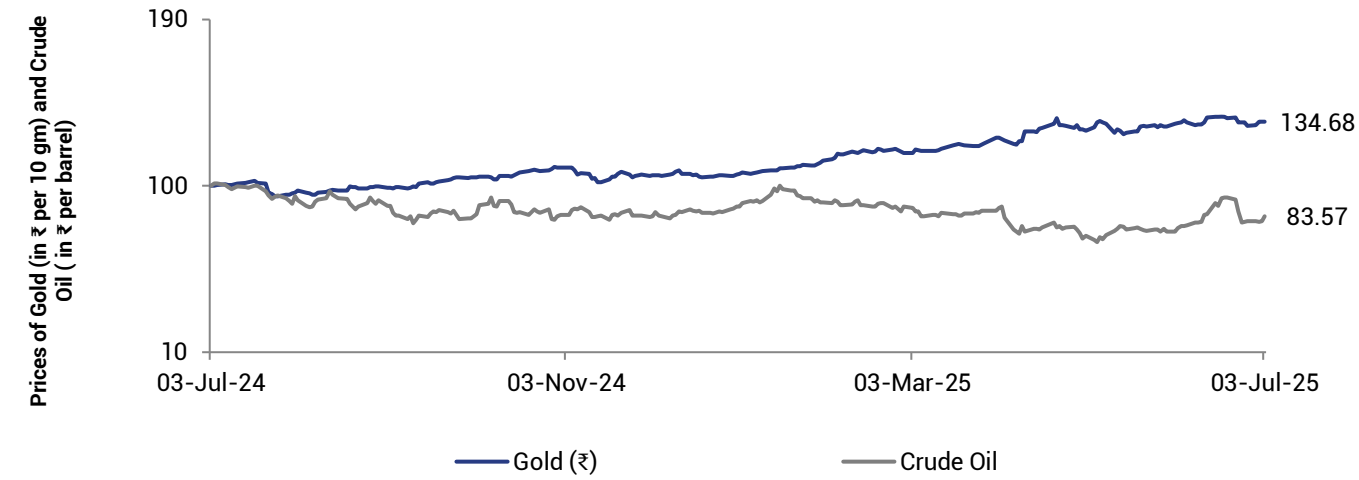
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.18	-0.36	3.39	8.99	13.55	1.18	1.01
GBP/USD	1.37	0.12	1.01	7.16	9.12	1.38	1.21
USD/JPY	144.92	0.87	0.64	-10.37	-7.80	161.99	139.56
SGD/USD	0.78	-0.18	1.11	6.16	7.07	0.78	0.73
Dollar Index	97.18	0.42	-2.06	-7.80	-10.42	110.18	96.38

Source: Refinitiv

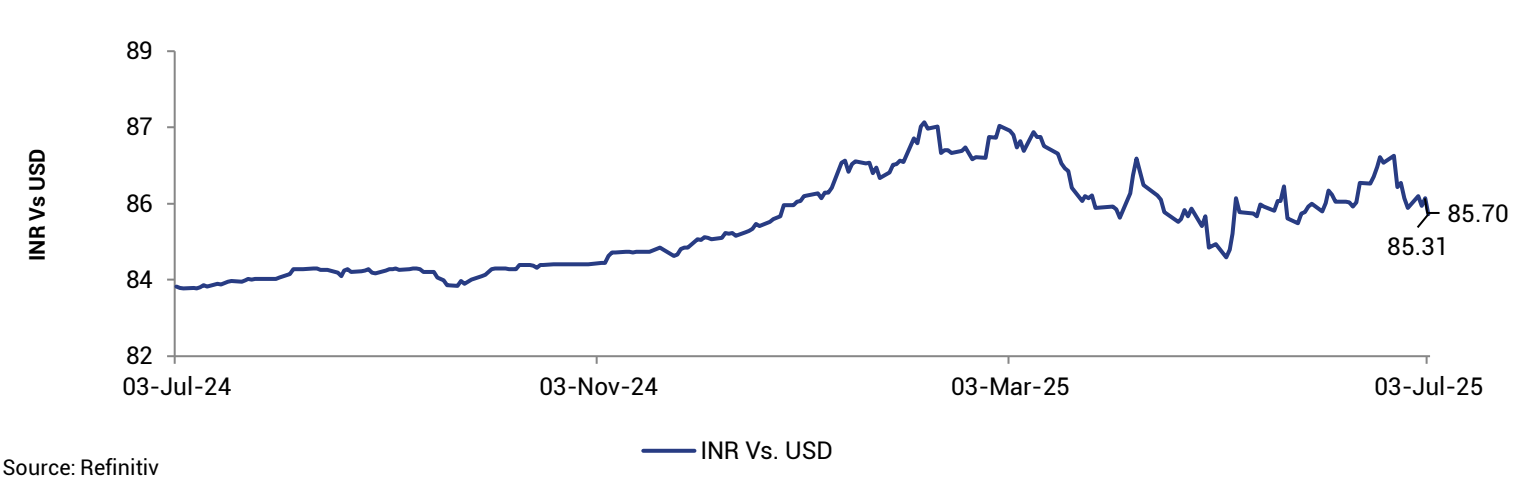
Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	85.42	-0.37	-0.53	-0.36	-0.22
Future 3 Month	85.84	-0.40	-0.18	-0.41	0.57
Future 6 Month	86.61	0.05	0.47	0.06	0.03
NDF 1 Month	85.44	-0.30	-0.50	-0.45	-0.18
NDF 3 Month	85.69	-0.30	-0.75	-0.48	-0.29
NDF 6 Month	86.18	-0.22	-0.78	-0.36	-0.30

Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



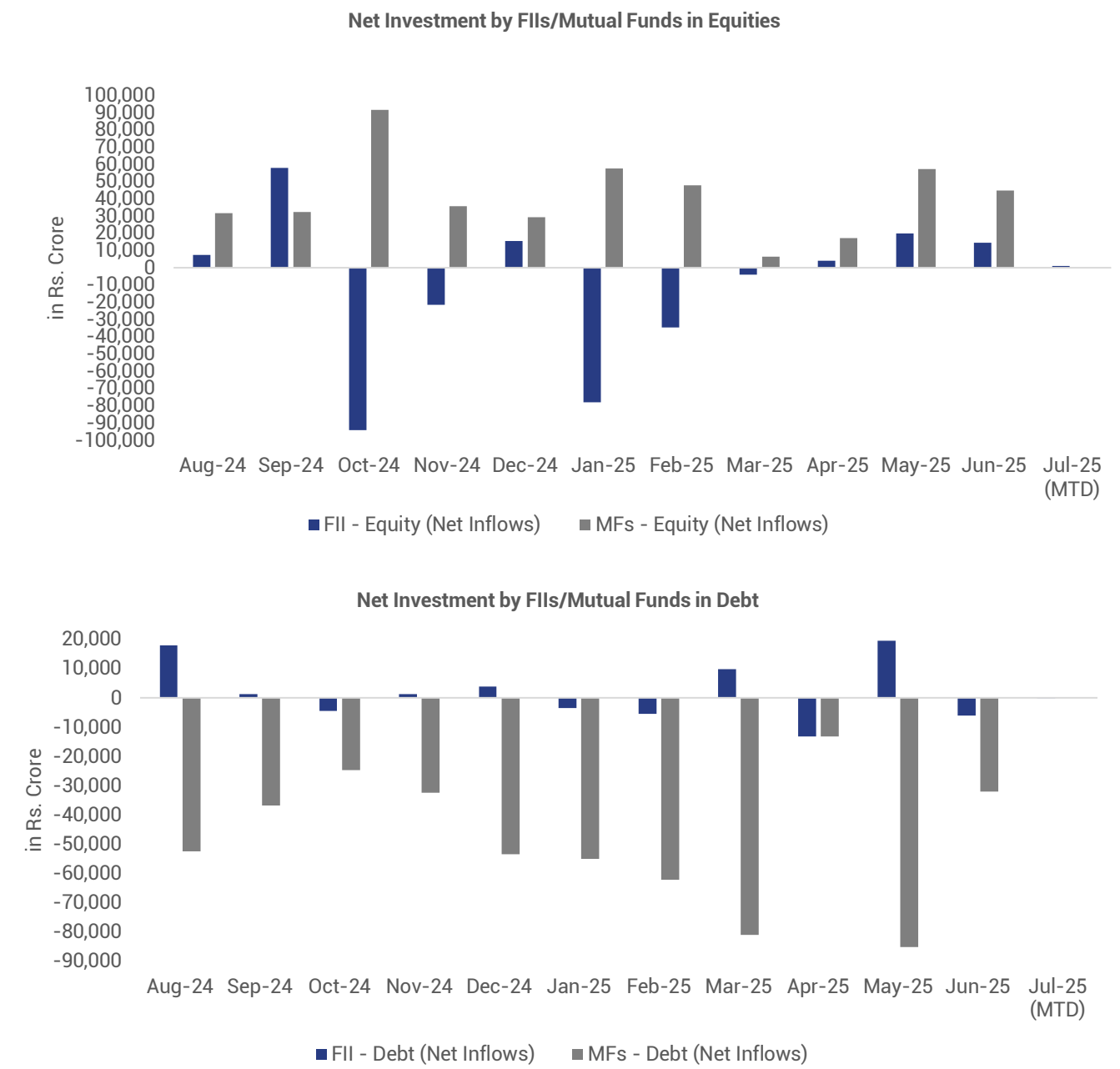
RUPEE VS. U.S. DOLLAR



MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 11,190.20 crore as against sale of Rs. 8,937.50 crore as on Jun 30, 2025. This led to a net purchase of Rs. 2,252.70 crore compared with a net sale of Rs. 223.90 crore on Jun 27, 2025.
- Mutual funds bought debt worth Rs. 6,522.63 crore as against sale of Rs. 8,687.46 crore as on Jun 30, 2025. This led to a net sale of Rs. 2,164.83 crore compared with a net sale of Rs. 165.26 crore on Jun 27, 2025.
- The Insurance Awareness Committee (IAC), established by the Life Insurance Council, has launched the “Sabse Pehle Life Insurance” campaign to promote awareness about life insurance through television, digital, and print media. The initiative aims to shift consumer behavior and improve insurance penetration. IAC highlighted that in 2023, the insurance protection gap among individuals aged 18 to 35 was 90%, indicating a significant shortfall between financial risks and the coverage available to manage them.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Forex Reserves	04-Jul-25
Loans and Advances to Central Government	04-Jul-25
Loans and Advances to State Government	04-Jul-25
Reserve Money	09-Jul-25
Money Supply	09-Jul-25
Currency in Circulation	09-Jul-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	-0.37	3.38	3.25	3.38	19.36	19.95
Mid Cap Fund	0.84	4.29	0.36	3.79	27.10	28.88
Large & Mid Cap Fund	0.25	3.75	1.58	4.24	23.72	24.68
Small Cap Fund	1.33	3.96	-2.51	2.24	26.58	33.36
Multi Cap Fund	0.47	3.74	0.56	4.06	24.77	26.34
Focused Fund	-0.12	3.36	1.89	3.62	20.78	21.19
Value Fund	0.28	3.30	1.17	1.55	24.92	25.95
Contra Fund	0.21	3.69	1.76	3.94	25.97	27.60
ELSS	0.38	3.71	1.60	3.09	22.42	24.58
Sectoral	0.48	3.78	2.72	6.59	24.91	25.41
Thematic	0.42	3.42	-0.14	1.78	23.16	23.48
Dividend Yield Fund	0.26	3.30	1.48	1.25	24.01	25.42

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	5.20	5.16	5.95	6.28	6.34	5.08
Liquid Fund	7.24	6.30	6.96	7.08	6.87	5.45
Ultra Short Duration Fund	10.05	7.39	7.66	7.33	6.76	5.48
Low Duration Fund	11.66	7.48	8.70	8.05	7.13	6.09
Money Market Fund	11.68	8.01	8.48	7.89	7.21	5.75
Short Duration Fund	14.17	4.09	10.09	9.14	7.51	6.16
Medium Duration Fund	13.15	1.96	10.53	9.56	8.14	6.81
Medium to Long Duration Fund	12.67	-6.13	9.31	8.52	7.56	5.54
Long Duration Fund	19.29	-21.09	7.23	7.43	9.00	5.45
Corporate Bond Fund	15.32	2.70	10.52	9.48	7.67	6.10
Gilt Fund	15.42	-15.76	8.19	7.94	7.67	5.44
Gilt Fund with 10 year constant duration	11.34	-4.00	12.06	10.69	8.92	5.71
Dynamic Bond	12.89	-8.85	9.17	8.54	7.64	5.85
Banking and PSU Fund	15.75	2.06	10.09	9.10	7.48	5.98
Floater Fund	11.75	4.94	9.88	9.07	7.85	6.35
Credit Risk Fund	12.91	5.64	14.20	11.33	8.70	9.31

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	0.56	3.21	6.70	6.66	5.34
Balanced Advantage	0.11	2.14	2.78	4.73	14.50	13.41
Aggressive Hybrid Fund	0.09	2.66	2.87	5.02	18.36	19.20
Equity Savings	0.11	1.30	3.13	6.43	11.30	11.22
Conservative Hybrid Fund	0.16	0.55	3.96	7.32	10.30	9.85
Multi Asset Allocation	0.14	2.16	5.56	6.82	17.74	19.50

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

Source: MFI 360 Explorer

Event	Date
Credit Growth	11-Jul-25
Deposit Growth	11-Jul-25
CPI Inflation (Jun 2025)	14-Jul-25
WPI Inflation (Jun 2025)	14-Jul-25
Infrastructure Output	31-Jul-25
Fiscal deficit (as a % of budget estimates)	31-Jul-25