



07 July 2025

INDIAN EQUITY MARKET

- Indian equity markets closed on a flat note as a cautious undertone prevailed due to uncertainty surrounding the approaching Jul 09, 2025 deadline for U.S. reciprocal tariffs. Additionally, robust U.S. jobs data for the month of Jun, 2025 dampened hopes for an imminent interest rate cut by the U.S. Federal Reserve. Meanwhile, tariff-related uncertainty continued to keep investor sentiment muted.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.01% and 0.00% to close at 83,442.50 and 25,461.30 respectively.
- The overall market breadth on BSE was weak with 1,649 scrips advancing and 2,436 scrips declining. A total of 176 scrips remained unchanged.

CORPORATE NEWS

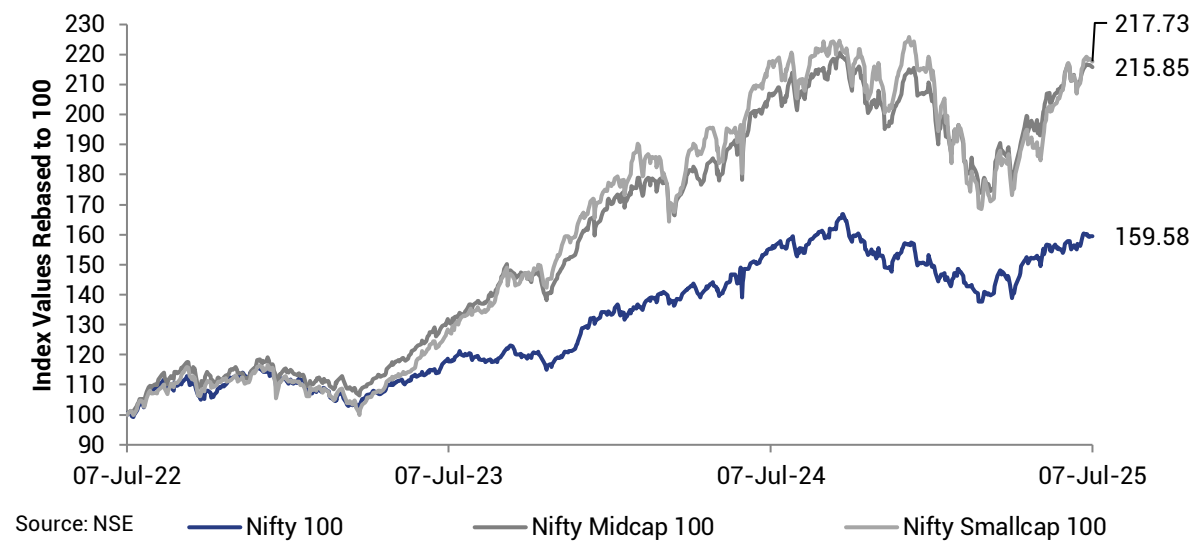
- JSW Infrastructure (JSW Infra) is set to construct container berths for the Syama Prasad Mookerjee Port Authority at Netaji Subhas Dock in Kolkata, with a projected capital expenditure (capex) of Rs. 740 crore.
- HCLSoftware, has introduced Domino 14.5, a sovereign artificial intelligence (AI) designed for governments and regulated entities that prioritize their data privacy.
- OLX India has introduced a subscription-based feature known as the Elite Buyer Program, designed for users who desire quicker and more dependable access to pre-owned items.
- Mansion House brandy producer Tilaknagar Industries has commenced exclusive discussions to purchase Imperial Blue whisky from the French spirits conglomerate Pernod Ricard.

GLOBAL EQUITY MARKET

- U.S. equity markets closed lower amid profit-taking and renewed tariff concerns. Fresh selling pressure emerged after the announcement of new U.S. tariffs targeting imports from Japan, South Korea, and other countries, heightening risks to global trade and investor sentiment.
- European equity markets closed mixed as delayed U.S. tariffs fueled uncertainty. With new levies due August 1, investors seek clarity on trade policy and market impact.
- Asian equity markets closed on a mixed note following the confirmation from the U.S. President that the "reciprocal" tariffs, initially announced in Apr 2025, will be implemented on Aug 1, 2025, for nations that have not reached an agreement. Today (as of July 08), Asian equity markets opened on higher, shrugging off U.S. tariff risks amid confidence in regional economic strength.

INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 25,538.90, a premium of 77.60 points above the spot closing of 25,461.30. The turnover on NSE's Futures and Options segment fell to Rs.4,662.31 crore on July 07, 2025, compared with Rs. 3,31,619.49 crore on July 04, 2025.
- The NSE Put-Call ratio stood at 0.8 compared with the previous session's close of 0.9.



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	25,461	0.00	1.83	4.68	7.68	26,277	21,744	22.92	21.93
Nifty 100	26,075	0.03	1.70	2.69	6.45	27,336	22,177	22.76	22.51
Nifty 500	23,551	-0.05	1.67	2.45	5.25	24,573	19,520	25.27	23.80
Nifty Midcap 100	59,516	-0.27	0.86	4.25	4.05	60,926	46,866	33.54	30.15
Nifty Smallcap 250	17,726	-0.20	2.55	0.08	-0.15	18,688	13,315	33.72	25.57
Nifty SME Emerge	14,920	0.20	2.17	-3.75	-10.15	17,224	11,930	32.96	48.58

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	23,944	-0.15	1.19	-5.73	4.86	27,696	19,317	24.99	29.52
Nifty Bank	56,949	-0.15	0.66	8.14	11.97	57,628	47,703	15.10	15.75
Nifty FMCG	55,653	1.68	-0.27	-3.50	-2.02	66,439	50,199	42.01	43.80
Nifty IT	38,867	-0.76	4.22	3.04	-10.32	46,089	30,919	28.70	28.53
Nifty Media	1,744	-1.03	2.22	-14.85	-4.09	2,182	1,344	601.87	726.72
Nifty Metal	9,522	-0.61	1.23	-4.50	10.08	10,322	7,690	19.35	21.01
Nifty Pharma	22,365	-0.09	3.14	9.34	-4.47	23,908	19,121	32.08	34.11
Nifty Realty	973	0.08	-6.43	-13.08	-7.56	1,141	766	48.37	50.51
Nifty Energy	36,532	0.06	1.69	-14.09	3.82	45,022	29,313	16.25	13.64

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	26,833	-0.12	-0.06	13.50	14.12	27,370	22,358	17.77	17.71
Nifty India Consumption	11,828	0.43	1.82	5.41	4.09	13,058	10,091	41.46	42.98
Nifty Infrastructure	9,455	0.22	4.12	2.21	11.72	9,704	7,590	24.58	21.36
Nifty MNC	29,046	0.49	1.73	-6.13	3.99	32,841	23,981	34.35	44.04
Nifty Public Sector Enterprise	10,082	-0.28	1.14	-9.14	5.76	11,815	7,956	12.93	10.15

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	22,686	-0.79	4.25	11.25	7.96	22,896	16,542	34.96	28.62
Nasdaq Composite	20,413	-0.92	4.52	11.22	5.71	20,625	14,784	32.26	20.84
FTSE 100	8,807	-0.19	-0.36	7.35	7.75	8,909	7,545	16.66	11.93
CAC 40	7,723	0.35	-1.04	0.62	4.64	8,258	6,764	16.77	13.15
DAX	24,074	1.20	-0.95	30.30	20.92	24,479	17,025	18.65	23.42
Nikkei	39,588	-0.56	4.89	-3.24	-0.77	42,427	30,793	18.95	18.15
Hang Seng	23,888	-0.12	0.40	34.20	19.08	24,874	16,441	11.01	9.92
SSE Composite Index	3,473	0.02	2.59	17.74	3.62	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	25,538.90	25,540.10	0.00
Near Basis	77.60	79.10	-1.90
Mid Futures	25,650.30	25,652.70	-0.01
Mid Basis	189.00	191.70	-1.41
Near Open Interest (Cr.)	1.33	1.35	-1.39
Mid Open Interest (Cr.)	0.26	0.21	22.01
Rollover (%)	17.49	14.84	17.87

Source: NSE

Transaction Trends (Equity)					
Amount in ₹ Cr.					
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	8,924	8,232	692	-729	-78,629
Mutual Funds**	9,566	8,543	1,022	2,105	233,091

*As on 7th July 2025;**As on 3rd July 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- India's apple imports are facing disruptions, with geopolitical factors influencing prices this harvest season. Investors are avoiding Turkish apples due to political tensions, while the closure of the Attari-Wagah border has halted imports from Afghanistan. This may lead to higher prices for Kashmiri and Himachali apples. Imports from Iran also carry risks. India's domestic apple production falls short of consumption, and imports are rising YoY.
- The Indian Staffing Federation (ISF) has urged the Finance Ministry to reduce the GST rate on employment services from 18% to 5%. The federation argues that this move would help generate more formal employment across the country and boost the competitiveness of the staffing industry.
- Union Commerce and Industry Minister pledged to recommend a reduction in the Goods and Services Tax (GST) on handicrafts and handloom products to support and promote the sector in Jammu and Kashmir.

INDIAN DEBT MARKET

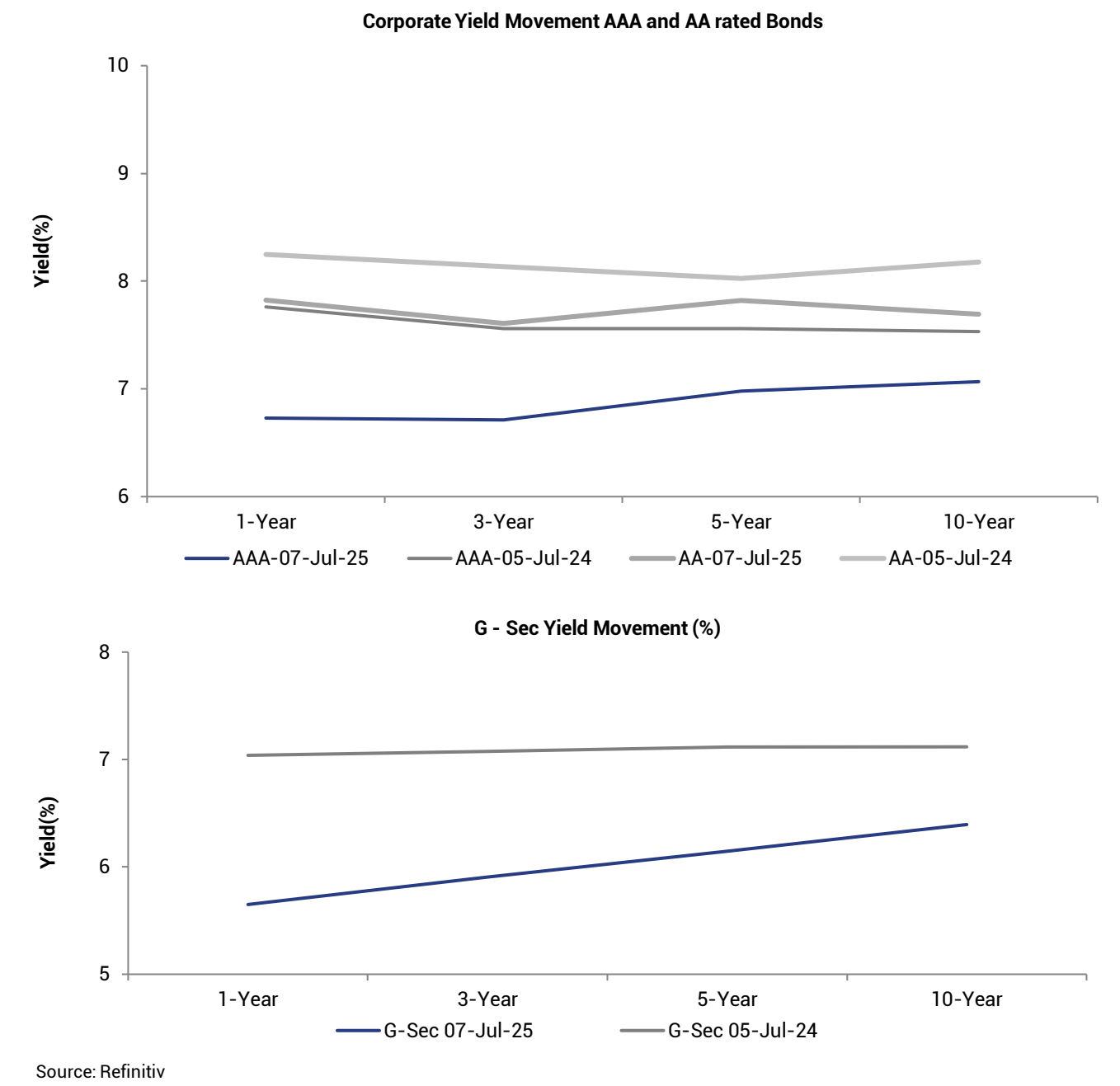
- Bond yields ended largely unchanged, with abundant liquidity supporting market sentiment, even as investors shrugged off the rupee's depreciation and awaited direction from U.S. Treasury yields and global trade policy signals.
- Yield on the 10-year benchmark paper (6.33% GS 2035) was unchanged to close at 6.30% as compared to the previous session's close.

MONEY MARKET

- Reserve Bank of India announced the sale (issue/re-issue) of two dated securities namely New GS 2032 and 7.09% GS 2074 for a notified amount of Rs. 25,000 crore. The auction will be conducted on Jul 11, 2025.

SPREAD ANALYSIS

- Yields on gilt were unchanged or moved by 1 bps across the maturities.
- Corporate bond yields increased up to 2 bps across the curve, barring 2 to 4 & 10 year papers that fell by 17, 11, 3 & 1 bps, respectively, while 9 year paper that was unchanged.
- Difference in spread between AAA corporate bond and gilt expanded up to 3 bps across the segments, barring 2 to 4 & 10 year papers that contracted by 16, 11, 3 & 1 bps, respectively.



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

Source: RBI

Daily Rates (%)	07-Jul-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.30	5.52	5.50	6.60
CALL	5.26	5.50	5.42	6.55
T-Repo	5.11	5.42	5.29	6.42
OIS- 3 M	5.42	5.46	5.42	6.70
OIS- 6 M	5.46	5.49	5.43	6.74

Source: FBIL

Certificate of Deposit (%)	07-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.73	5.87	5.77	7.15
6-Month	5.94	6.11	6.04	7.43
9-Month	6.03	6.24	6.09	7.51
12-Month	6.17	6.33	6.20	7.67

Source: Refinitiv

Commercial Paper (%)	07-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.78	5.88	5.90	7.15
6-Month	5.98	6.18	6.05	7.43
12-Month	6.25	6.40	6.20	7.58

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	5.57	5.57	5.50	6.92	0	7	-135
3 Yr GOI Bond	5.82	5.83	5.65	6.96	-1	17	-113
5 Yr GOI Bond	6.05	6.06	5.81	6.99	-1	24	-94
10 Yr GOI Bond	6.30	6.30	6.23	6.99	0	6	-70
15 Yr GOI Bond	6.64	6.64	6.50	7.03	0	14	-39
US 10 Yr Treasury	4.40	4.34	4.51	4.27	6	-12	12

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	07-Jul-25	1 Month Avg.	1 Year Avg.	07-Jul-25	1 Month Avg.	1 Year Avg.
1 Yr	108	117	91	217	204	147
3 Yr	81	110	75	170	175	138
5 Yr	83	98	68	167	169	120
10 Yr	67	79	51	130	138	105

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	07-Jul-25	Week Ago	Month Ago	Year Ago
Govt Securities	39,842	52,474	141,775	49,996
Call Money	17,014	13,226	12,632	9,511
T-Repo	400,746	396,463	407,022	361,220
LAF	NA	NA	NA	NA
Treasury Bills	3,005	7,451	4,966	3,280
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*	321	154	167	130	1,088
Mutual Funds**	20,642	16,801	3,841	12,509	-316,881

*As on 7th July 2025,**As on 3rd July 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: July 7-11 ,2025	25,000	--	N.A
Month: Jul 2025	120,000	--	N.A
H1: Apr 25-Sep 25	800,000	433,000	54.13%

Source: RBI

GLOBAL ECONOMY

- Eurozone's retail sales fell by 0.7% MoM in May 2025, marking the first decrease in five months and reversing the 0.3% increase recorded in Apr 2025, as reported by Eurostat.
- Eurozone's investor confidence index increased to 4.5 in Jul 2025, up from 0.2 in Jun 2025, as reported by the behavioral research institute Sentix. This figure represents the highest level since Feb 2022.
- Germany's industrial production expanded 1.0% in May 2025, in contrast to the 2.1% decrease seen in Apr 2025, according to Destatis.

INTERNATIONAL MARKET UPDATE

- Japan's leading index, which measures future economic activity, rose to 105.3 in May 2025 from 104.2 in Apr 2025, according to the Cabinet Office.

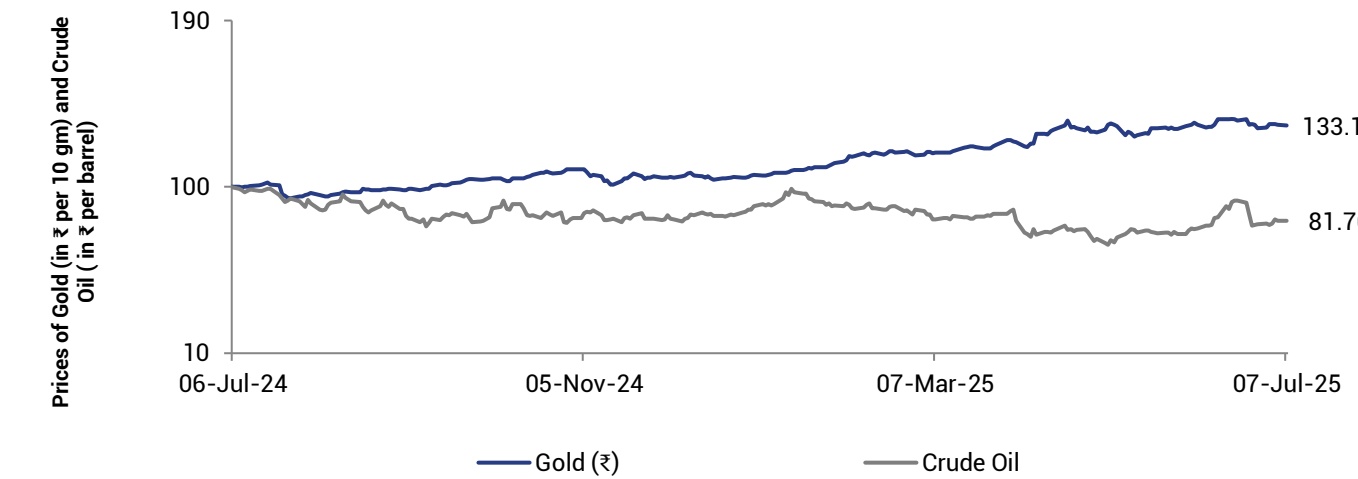
COMMODITY MARKET

- Gold prices eased as a stronger dollar and pending U.S. trade decisions made investors cautious about safe-haven positioning.
- Brent crude oil prices rose, supported by tight supply despite the OPEC+ output hike and concerns over U.S. tariffs.

CURRENCY UPDATE

- The Indian rupee weakened in spot trade against the U.S. dollar amid rising global crude oil prices
- The euro rose against the U.S. dollar as investors braced for the U.S. President's upcoming tariff deadline.

CRUDE OIL VS. GOLD (IN ₹)



Source: MCX-SX

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,335	-0.03	0.77	39.46	27.11	3,432	2,359
Silver (\$/oz)	37	-0.46	2.18	17.70	27.24	37	27
NYMEX Crude(\$/bbl)	69	1.51	6.08	-18.12	-4.53	84	58
Brent Crude(\$/bbl)	72	1.06	5.12	-19.65	-5.35	89	62
Baltic Dry Index	1,436	0.00	-12.06	-26.96	44.03	2,110	715
Core Commodity Index	368	-0.17	-0.17	6.77	3.12	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)	96,317	-0.30	-0.34	33.13	26.88	98,931	67,884
Silver (1 kg)	107,068	-0.19	1.98	18.20	24.71	109,174	78,617
Crude Oil (1 bbl)	5,729	0.00	5.41	-18.24	-5.57	7,249	1,277
Natural Gas (1 mmbtu)	292	0.00	-7.58	44.31	-13.35	392	138
Aluminium (1 kg)	248	-0.58	3.14	5.06	2.41	267	209
Copper (1 kg)	891	-0.47	1.54	2.65	11.64	934	772
Nickel (1 kg)	1,321	-0.95	-1.54	-9.87	-1.30	1,783	1,276
Lead (1 kg)	184	-0.49	0.60	-4.73	-1.92	201	179
Zinc (1 kg)	259	-0.56	0.86	-7.76	-8.93	301	241
Mentha Oil (1 kg)	933	-0.43	-1.58	-5.32	-6.18	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	85.85	0.54	0.26	2.83	0.27	87.95	83.43
EUR/INR	100.39	-0.28	2.74	10.95	13.34	101.17	87.29
GBP/INR	116.61	-0.06	0.57	9.02	8.94	117.95	104.67
YEN(100)/INR	58.70	-0.71	-0.82	13.01	7.87	60.83	51.58
SGD/INR	66.97	-0.10	0.72	8.18	6.91	67.61	61.73

Source: Refinitiv

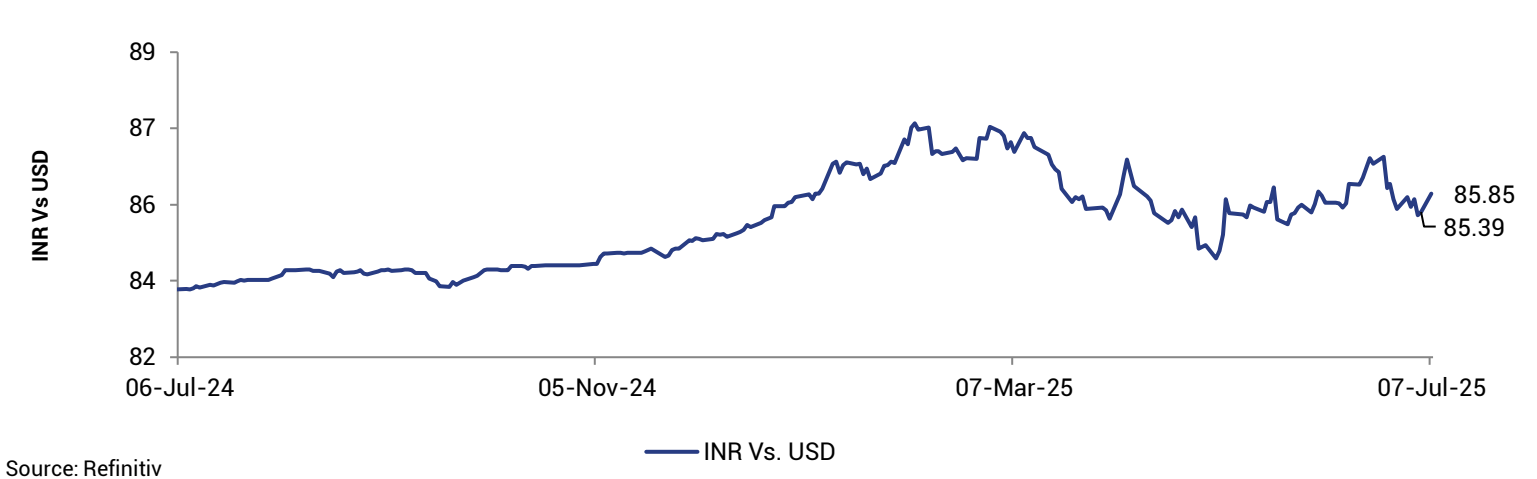
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	-0.60	2.75	8.04	13.08	1.18	1.01
GBP/USD	1.36	-0.39	0.58	6.18	8.70	1.38	1.21
USD/JPY	146.02	1.02	0.81	-9.15	-7.10	161.82	139.56
SGD/USD	0.78	-0.41	0.77	5.40	6.71	0.78	0.73
Dollar Index	97.48	0.53	-1.72	-7.05	-10.15	110.18	96.38

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	85.47	0.06	-0.48	-0.32	-0.60
Future 3 Month	85.73	-0.12	-0.30	-0.57	-0.76
Future 6 Month	86.63	0.03	0.50	0.03	-0.18
NDF 1 Month	85.59	0.18	-0.33	-0.30	-0.61
NDF 3 Month	85.93	0.28	-0.47	-0.17	-0.61
NDF 6 Month	86.26	0.09	-0.69	-0.21	-0.92

Source: Refinitiv

RUPEE VS. U.S. DOLLAR

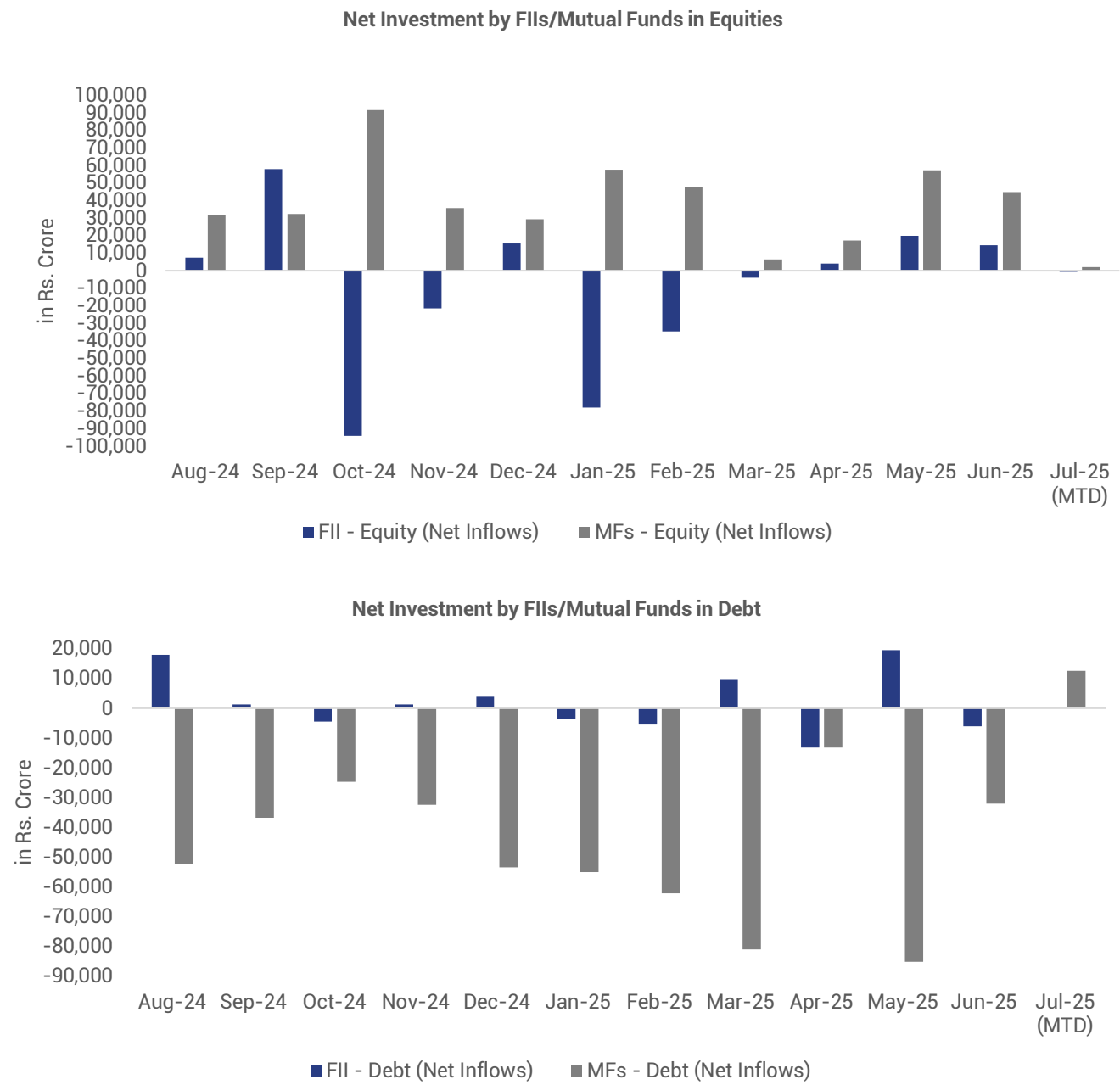


Source: Refinitiv

MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 9,565.92 crore as against sale of Rs. 8,543.49 crore as on Jul 3, 2025. This led to a net purchase of Rs. 1,022.43 crore compared with a net purchase of Rs. 1,341.44 crore on Jul 2, 2025.
- Mutual funds bought debt worth Rs. 20,642.44 crore as against sale of Rs. 16,800.99 crore as on Jul 3, 2025. This led to a net purchase of Rs. 3,841.45 crore compared with a net purchase of Rs. 4,987.20 crore on Jul 2, 2025.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Reserve Money	09-Jul-25
Money Supply	09-Jul-25
Forex Reserves	11-Jul-25
Credit Growth	11-Jul-25
Deposit Growth	11-Jul-25
Loans and Advances to Central Government	11-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	-0.35	1.73	5.03	3.18	18.36	19.64
Mid Cap Fund	-0.55	1.68	1.65	2.42	25.45	28.36
Large & Mid Cap Fund	-0.59	1.46	3.13	3.43	22.40	24.23
Small Cap Fund	0.05	2.41	-1.20	1.33	25.42	32.92
Multi Cap Fund	-0.21	1.93	2.13	3.20	23.62	26.03
Focused Fund	-0.54	1.32	3.37	3.11	19.62	20.80
Value Fund	-0.09	1.88	2.91	1.20	23.98	25.62
Contra Fund	-0.01	2.05	3.43	3.49	24.80	27.22
ELSS	-0.28	1.77	3.01	2.43	21.28	24.16
Sectoral	-0.12	2.02	4.21	6.05	23.87	25.12
Thematic	-0.11	1.86	1.43	0.98	22.07	23.24
Dividend Yield Fund	0.03	1.92	3.37	0.62	23.16	25.25

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	5.12	5.12	5.92	6.26	6.34	5.08
Liquid Fund	6.96	5.85	6.94	7.08	6.87	5.46
Ultra Short Duration Fund	9.61	5.86	7.65	7.32	6.75	5.48
Low Duration Fund	12.00	5.22	8.71	8.04	7.11	5.81
Money Market Fund	10.96	6.09	8.48	7.87	7.20	5.75
Short Duration Fund	16.21	1.55	10.03	9.11	7.46	6.05
Medium Duration Fund	24.88	2.97	10.75	9.73	8.13	6.87
Medium to Long Duration Fund	14.43	-3.20	9.03	8.53	7.46	5.45
Long Duration Fund	20.69	-10.38	6.76	7.60	8.74	5.41
Corporate Bond Fund	16.94	0.67	10.43	9.43	7.60	6.06
Gilt Fund	18.65	-7.46	7.76	8.01	7.60	5.38
Gilt Fund with 10 year constant duration	16.10	-1.33	11.62	10.62	8.76	5.63
Dynamic Bond	15.85	-4.93	8.82	8.58	7.57	5.80
Banking and PSU Fund	17.00	-0.17	10.02	9.05	7.41	5.94
Floater Fund	13.60	3.39	9.82	9.06	7.82	6.32
Credit Risk Fund	17.52	4.80	14.26	11.37	8.67	9.41

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	0.53	3.21	6.69	6.69	5.36
Balanced Advantage	-0.02	1.14	3.77	4.49	13.98	13.20
Aggressive Hybrid Fund	-0.16	1.39	4.12	4.71	17.59	18.78
Equity Savings	0.05	0.78	3.61	6.33	11.01	11.07
Conservative Hybrid Fund	0.18	0.32	4.24	7.25	10.05	9.73
Multi Asset Allocation	0.04	1.01	6.49	6.38	17.25	19.33

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

Source: MFI 360 Explorer

Event	Date
Loans and Advances to State Government	11-Jul-25
CPI Inflation (Jun 2025)	14-Jul-25
WPI Inflation (Jun 2025)	14-Jul-25
Index of Industrial Production (Jun 2025)	28-Jul-25
Infrastructure Output	31-Jul-25
Fiscal deficit (as a % of budget estimates)	31-Jul-25