



09 July 2025

### INDIAN EQUITY MARKET

- Indian equity markets ended lower as investor sentiment was dampened by uncertainty surrounding potential U.S. tariffs. Additionally, caution ahead of the Q1FY26 earnings season contributed to the downward pressure on domestic equities.
- Key benchmark indices BSE SENSEX and Nifty 50 lost 0.21% and 0.18% to close at 83,536.08 and 25,476.10 respectively.
- On the BSE sectoral front, Fast Moving Consumer Goods was the major gainer, up 0.74% followed by Consumer Durables, up 0.47% and Auto, up 0.4%. Oil & Gas was the major loser, down 1.41% followed by Metal, down 1.41% and Realty, down 1.4%.
- The overall market breadth on BSE was weak with 1,752 scrips advancing and 2,207 scrips declining. A total of 160 scrips remained unchanged.

### CORPORATE NEWS

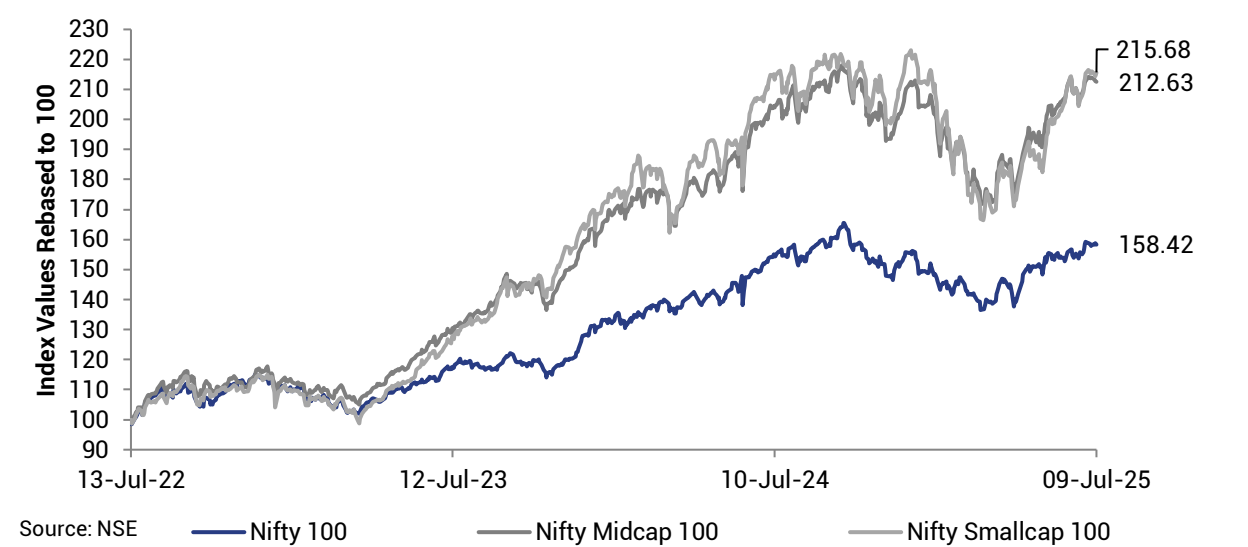
- Oil India Limited (OIL) and GAIL (India) Limited have entered into an agreement to prolong their current Gas Sale and Purchase Agreement for an additional 15 years, commencing on Jul 1, 2025.
- Asian Paints has sold its complete holding of 2.01 million equity shares in Akzo Nobel India Limited, the producers of the Dulux brand, which represents 4.42% of the company's total shares.
- Sattva Group plans to invest Rs. 1,500 crore in the development of a 30-acre mixed-use project in Vizag, Andhra Pradesh, as part of its expansion strategy. The company recognized as one of the foremost real estate firms in South India, made the decision to proceed with this project.
- Adani Power Ltd. announced the successful completion of the acquisition and implementation of the resolution plan for Vidarbha Industries Power Ltd, with a total consideration of Rs. 4,000 crore.

### GLOBAL EQUITY MARKET

- U.S. equity markets rose on optimism surrounding a potential trade agreement between the United States and the European Union. Investors also monitored developments on the trade front, as the U.S. President posted several additional letters to world leaders on Truth Social, outlining plans to increase tariffs.
- European equity markets advanced amid growing expectations that the EU and the U.S. will reach a trade deal before the newly announced deadline of Aug 1, 2025.
- Asian equity markets closed on a mixed note after the U.S. President expanded his trade war with steep new tariffs targeting copper, semiconductors and pharmaceuticals. Additionally, Chinese markets ended slightly lower after the release of inflation data for Jun 2025. Today (as of July 10), Asian markets opened mixed as U.S. tariffs unsettled investor sentiment.

### INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 25,558.80, a premium of 82.70 points above the spot closing of 25,476.10. The turnover on NSE's Futures and Options segment fell to Rs.6,200.75 crore on July 09, 2025, compared with Rs. 3,39,998.59 crore on July 08, 2025.
- The NSE Put-Call ratio stood at 0.81 compared with the previous session's close of 0.76.



### 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	25,476	-0.18	1.49	4.27	7.75	26,277	21,744	22.93	21.94
Nifty 100	26,084	-0.16	1.18	2.23	6.48	27,336	22,177	22.77	22.51
Nifty 500	23,557	-0.06	0.97	2.12	5.28	24,573	19,520	25.27	23.82
Nifty Midcap 100	59,340	-0.13	-0.56	3.96	3.74	60,926	46,866	33.43	30.19
Nifty Smallcap 250	17,782	0.55	1.53	0.42	0.17	18,688	13,315	33.83	25.60
Nifty SME Emerge	14,961	0.68	2.48	-0.86	-9.91	17,224	11,930	32.69	48.34

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	0.38	0.70	-7.28	4.86	27,696	19,317	24.99	29.43
Nifty Bank	57,214	-0.07	0.66	8.84	12.49	57,628	47,703	15.17	15.74
Nifty FMCG	55,946	0.80	-0.14	-5.47	-1.50	66,439	50,199	42.23	43.80
Nifty IT	38,681	-0.78	2.69	2.69	-10.75	46,089	30,919	28.55	28.54
Nifty Media	1,735	-0.39	1.27	-15.27	-4.57	2,182	1,344	598.82	722.99
Nifty Metal	9,385	-1.40	-0.98	-5.03	8.49	10,322	7,690	19.07	21.04
Nifty Pharma	22,209	0.19	1.75	7.57	-5.14	23,908	19,121	31.86	34.10
Nifty Realty	968	-1.49	-6.78	-14.13	-8.04	1,141	766	48.13	50.49
Nifty Energy	36,518	-0.24	0.45	-14.30	3.78	45,022	29,313	16.24	13.66

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	27,058	0.15	0.24	14.35	15.08	27,370	22,358	17.92	17.71
Nifty India Consumption	11,805	0.14	1.26	3.77	3.89	13,058	10,091	41.38	42.99
Nifty Infrastructure	9,420	-0.65	2.96	1.68	11.30	9,704	7,590	24.49	21.39
Nifty MNC	29,027	0.21	0.75	-6.96	3.92	32,841	23,981	34.32	43.98
Nifty Public Sector Enterprises	10,126	-0.34	0.40	-9.86	6.23	11,815	7,956	12.99	10.18

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	22,865	0.72	4.90	11.79	8.82	22,915	16,542	34.69	28.68
Nasdaq Composite	20,611	0.94	5.21	11.84	6.73	20,645	14,784	31.83	20.87
FTSE 100	8,867	0.15	0.39	8.93	8.49	8,909	7,545	16.72	11.94
CAC 40	7,878	1.44	1.12	4.93	6.74	8,258	6,764	16.91	13.18
DAX	24,550	1.42	1.55	34.62	23.31	24,609	17,025	18.98	23.45
Nikkei	39,821	0.33	4.55	-4.23	-0.18	42,427	30,793	19.05	18.16
Hang Seng	23,892	-1.06	-1.20	36.35	19.10	24,874	16,441	11.01	9.92
SSE Composite Index	3,493	-0.13	2.74	18.03	4.22	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	25,558.80	25,611.90	-0.21
Near Basis	82.70	89.40	-7.49
Mid Futures	25,667.50	25,728.40	-0.24
Mid Basis	191.40	205.90	-7.04
Near Open Interest (Cr.)	1.35	1.33	0.86
Mid Open Interest (Cr.)	0.36	0.32	12.87
Rollover (%)	22.22	20.40	8.92

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	12,845	12,561	284	2,327	-75,573
Mutual Funds**	8,105	6,913	1,192	2,871	235,923

\*As on 9th July 2025;\*\*As on 7th July 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- According to government data, toll collection on India's highways jumped 19.6% to a record Rs. 20,681.87 crore in Q1 FY26, compared to Rs. 17,279.86 crore in the same period of FY25, mainly due to a low base, increased toll rates, and the addition of new toll roads.
- According to government officials, the Central Board of Direct Taxes recovered Rs. 20,000 crore in outstanding dues in Q1 FY26, nearly double the amount from the same period last year. The recovery included Rs. 17,244 crore in corporate tax, Rs. 2,714 crore in personal income tax, and Rs. 180 crore from TDS shortfalls.
- The Union Finance Ministry has told the Delhi High Court that it has no current plans to issue a Rs. 50 coin, citing strong public preference for lighter currency notes over heavier coins like Rs. 10 and Rs. 20.

INDIAN DEBT MARKET

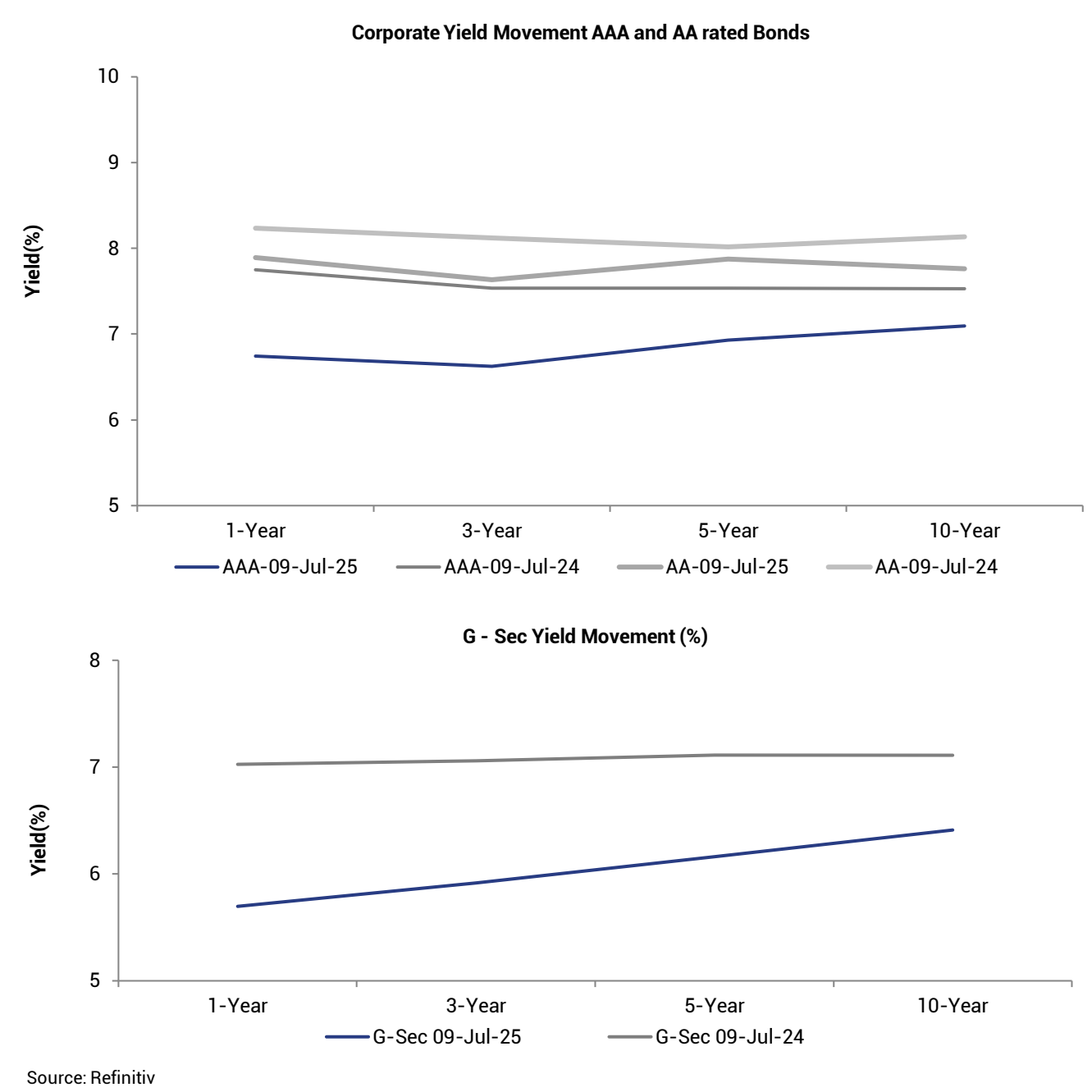
- Bond yields moved marginally, while the RBI's decision to withdraw funds from the banking system dampened market sentiment.
- Yield on the 10-year benchmark paper (6.33% GS 2035) was unchanged to close at 6.31% as compared to the previous day's close.
- Data from Reserve Bank of India showed that reserve money grew 4.4% on a yearly basis for the week ended Jul 04, 2025, compared to an increase of 8.1% in the same period of the previous year. The currency in circulation grew 7.0% on a yearly basis for the week ended Jul 04, 2025 compared to an increase of 6.1% in the same period of the previous year.
- Reserve Bank of India conducted the auction of 91 days, 182 days and 364 days Treasury Bills for an aggregate amount of Rs. 20,000 crore for which the full amount was accepted, and the cut-off rate stood at Rs. 98.6747 (YTM: 5.3872%), Rs. 97.3132 (YTM: 5.5371%) and Rs. 94.7298 (YTM: 5.5787%), respectively.
- RBI conducted the auction of 2-day Variable Rate Reverse Repo for the notified amount of Rs. 1,00,000 crore for which amount of Rs. 97,315 crore was accepted and the cut-off yield stood at 5.49%.

MONEY MARKET

- According to media report, Bajaj Housing Finance accepted bids worth Rs. 1,000 crore for the reissue of 7.08% June 2030 bonds. The company will offer a yield of 7.16%.

SPREAD ANALYSIS

- Yields on gilt rose by 1 bps across the maturities, barring 1 & 2 year papers that increased by 7 & 2 bps, respectively, and 19 year paper that fell by 1 bps.
- Corporate bond yields increased by 1 bps across the curve, barring 2 year paper that fell by 1 bps, while, 3 year paper was unchanged.
- Difference in spread between AAA corporate bond and gilt remained steady across the segments, barring 1 & 2 year papers that contracted by 5 & 3 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 (%)	09-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 (%)	09-Jul-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.36	5.30	5.35	6.55
CALL	5.32	5.27	5.30	6.47
T-Repo	5.29	5.14	5.20	6.40
OIS- 3 M	5.44	5.44	5.42	6.68
OIS- 6 M	5.48	5.48	5.44	6.73

Source: FBIL

Certificate of Deposit (%)	09-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.79	5.70	5.73	7.07
6-Month	5.97	5.94	6.00	7.42
9-Month	6.05	6.00	6.08	7.50
12-Month	6.19	6.24	6.15	7.66

Source: Refinitiv

Commercial Paper (%)	09-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.79	5.84	5.78	7.16
6-Month	6.07	6.05	6.00	7.43
12-Month	6.27	6.29	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	5.62	5.55	5.50	6.91	7	12	-129
3 Yr GOI Bond	5.83	5.82	5.70	6.94	1	13	-111
5 Yr GOI Bond	6.07	6.06	5.88	6.99	1	19	-92
10 Yr GOI Bond	6.31	6.31	6.28	6.99	1	3	-68
15 Yr GOI Bond	6.65	6.64	6.59	7.02	1	6	-38
US 10 Yr Treasury	4.34	4.42	4.48	4.30	-8	-14	4

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	09-Jul-25	1 Month Avg.	1 Year Avg.	09-Jul-25	1 Month Avg.	1 Year Avg.
1 Yr	105	116	91	220	205	148
3 Yr	71	107	75	172	175	138
5 Yr	77	96	68	171	169	121
10 Yr	68	78	51	135	138	105

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	09-Jul-25	Week Ago	Month Ago	Year Ago
Govt Securities	41,306	51,187	74,160	33,705
Call Money	17,771	16,897	14,727	10,660
T-Repo	395,113	429,235	374,906	361,181
LAF	NA	NA	NA	NA
Treasury Bills	14,588	8,238	2,846	4,933
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*	1,456	272	1,185	1,066	2,024
Mutual Funds**	11,974	10,934	1,040	16,836	-307,273

\*As on 9th July 2025;\*\*As on 7th July 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: July 7-11 ,2025	25,000	0	N.A
Month: Jul 2025	120,000	0	N.A
H1: Apr 25-Sep 25	800,000	433,000	54.13%

Source: RBI



GLOBAL ECONOMY

- China's consumer price index rose 0.1% in Jun 2025 for the first time in five months, compensating for a decline of 0.1% in May 2025, as reported by the National Bureau of Statistics.
- The U.S. wholesale decreased by 0.3% in May 2025, following a slight increase of 0.1% in Apr 2025., according to the Commerce Department.

INTERNATIONAL MARKET UPDATE

- The U.S. Crude oil inventories increased by 7.1 million barrels for the week ending Jul 4, 2025, following a rise of 3.8 million barrels in the preceding week, as reported by the Energy Information Administration.

COMMODITY MARKET

- Gold prices increased amid ongoing trade uncertainty.
- Brent crude oil prices (spot) rose, supported by EIA data indicating strong gasoline demand.

CURRENCY UPDATE

- The Indian rupee strengthened in spot trading against the U.S. dollar, driven by optimism over a potential trade deal with the U.S. and a delay in the implementation of reciprocal tariffs.
- The euro weakened against the U.S. dollar due to escalating trade concerns.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,313	0.39	-0.43	40.18	26.28	3,432	2,364
Silver (\$/oz)	36	-1.21	-1.06	18.01	25.84	37	27
NYMEX Crude(\$/bbl)	70	0.09	5.65	-15.93	-3.91	84	58
Brent Crude(\$/bbl)	74	0.69	7.41	-15.33	-2.68	89	62
Baltic Dry Index	1,423	-0.56	-15.85	-24.87	42.73	2,110	715
Core Commodity Index	371	-0.20	0.40	8.85	3.96	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)	95,654	-0.91	-0.02	32.35	26.00	98,931	67,884
Silver (1 kg)	107,040	-0.32	1.44	16.74	24.68	109,174	78,617
Crude Oil (1 bbl)	5,857	0.48	5.72	-14.78	-3.46	7,249	1,277
Natural Gas (1 mmbtu)	286	-2.22	-11.80	44.96	-14.89	392	138
Aluminium (1 kg)	249	0.30	3.92	6.20	2.83	267	209
Copper (1 kg)	885	-1.47	0.26	1.47	10.94	934	772
Nickel (1 kg)	1,310	-1.01	-2.50	-10.30	-2.10	1,783	1,276
Lead (1 kg)	183	0.00	0.05	-7.30	-2.58	201	179
Zinc (1 kg)	260	0.93	1.66	-6.46	-8.56	301	241
Mentha Oil (1 kg)	933	-0.29	0.18	-5.61	-6.16	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	85.67	-0.03	0.06	2.62	0.07	87.95	83.44
EUR/INR	100.41	-0.13	2.65	11.26	13.36	101.17	87.29
GBP/INR	116.39	-0.13	0.31	9.09	8.74	117.95	104.67
YEN(100)/INR	58.55	0.08	-1.14	13.17	7.58	60.83	51.58
SGD/INR	66.90	-0.16	0.50	8.29	6.81	67.61	61.73

Source: Refinitiv

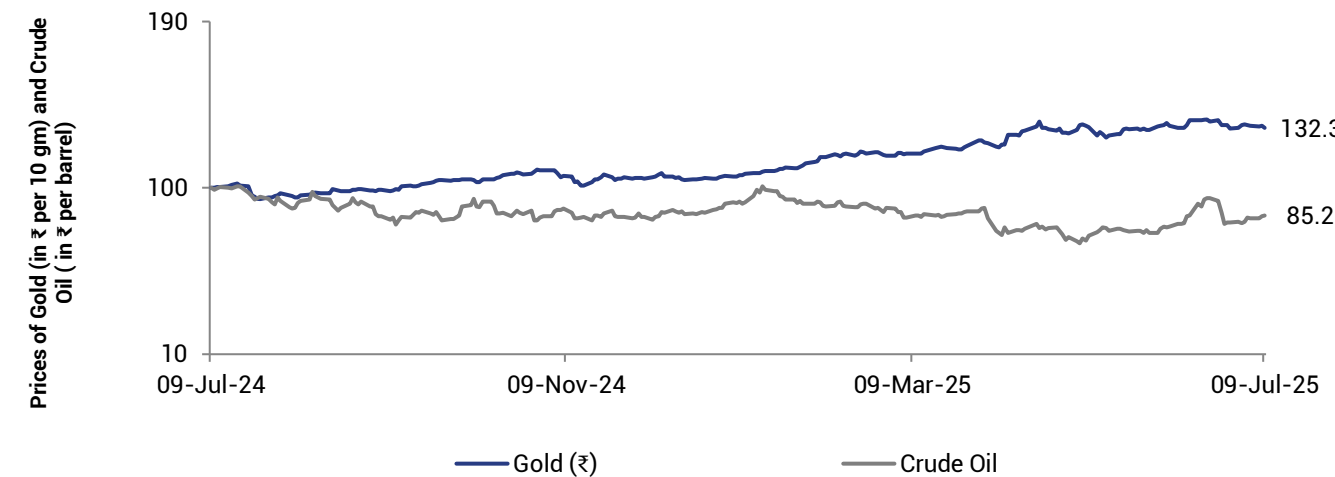
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	-0.04	2.62	8.39	13.19	1.18	1.01
GBP/USD	1.36	0.01	0.29	6.28	8.59	1.38	1.21
USD/JPY	146.31	-0.16	1.20	-9.30	-6.92	161.82	139.56
SGD/USD	0.78	-0.11	0.45	5.50	6.65	0.78	0.73
Dollar Index	97.56	0.04	-1.40	-7.20	-10.08	110.18	96.38

Source: Refinitiv

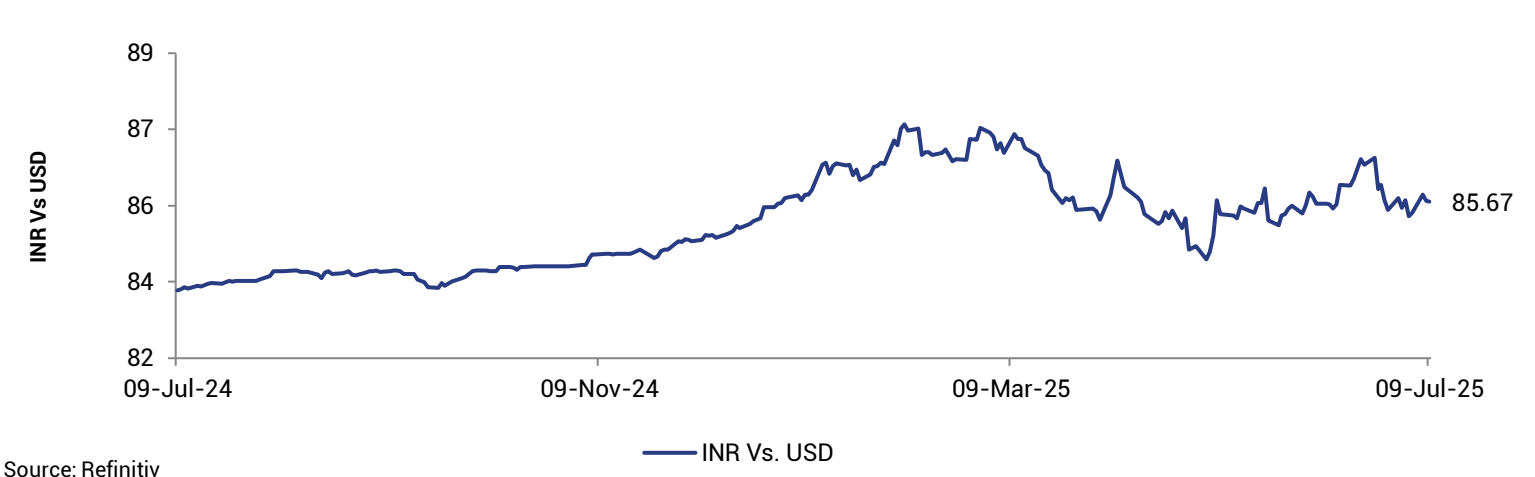
Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	85.77	0.01	-0.13	0.06	-1.23
Future 3 Month	86.19	0.20	0.23	0.07	-1.11
Future 6 Month	86.98	0.03	0.90	0.47	-0.79
NDF 1 Month	85.80	-0.04	-0.08	0.11	-0.92
NDF 3 Month	86.05	-0.01	-0.34	0.14	-1.02
NDF 6 Month	86.46	-0.03	-0.46	0.19	-1.12

Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹ )



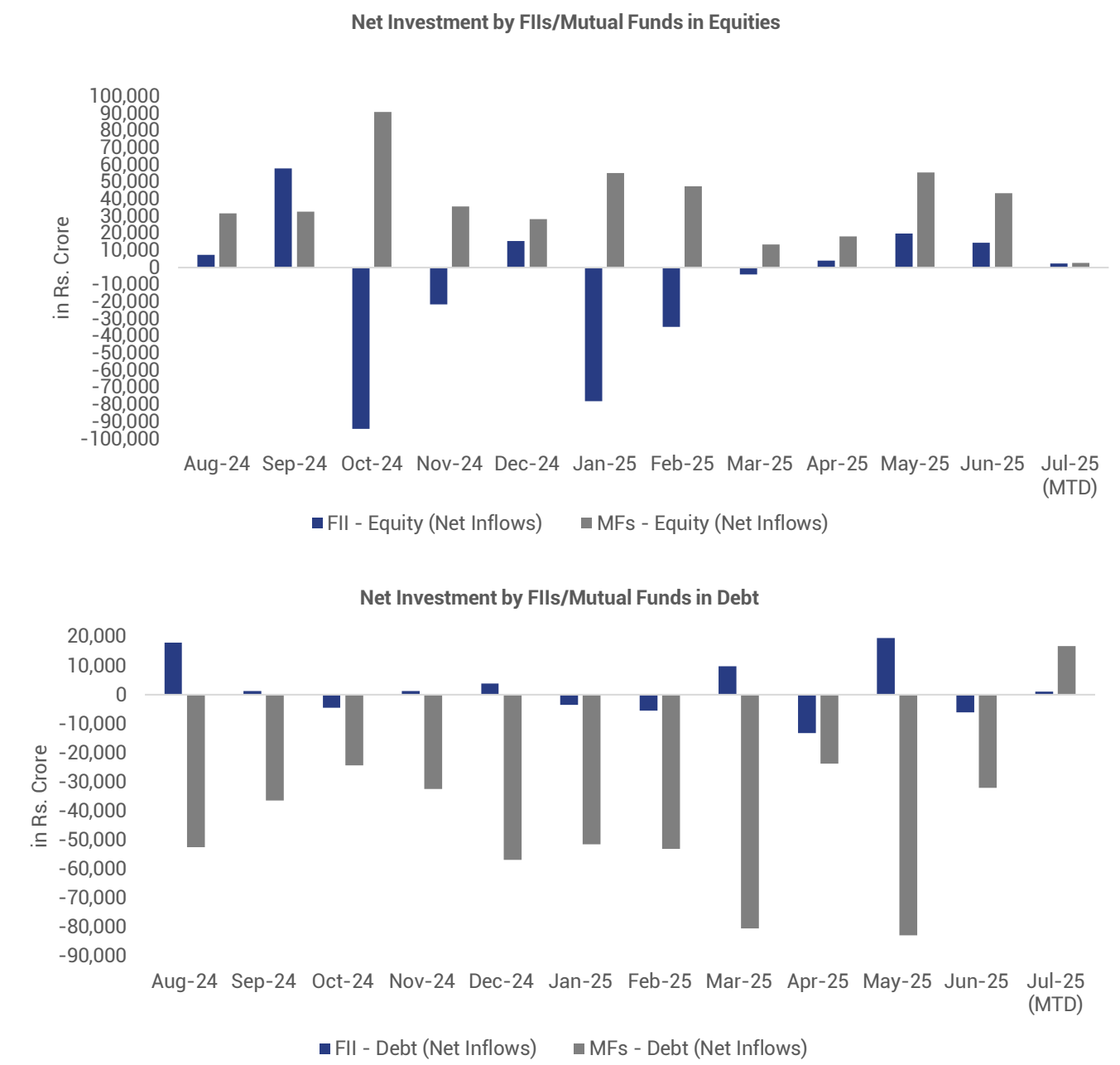
RUPEE VS. U.S. DOLLAR



MUTUAL FUND AND INSURANCE UPDATE

- According to a recent consultation paper, SEBI proposed relaxing norms to allow mutual fund companies to offer fund management and advisory services to pooled non-broad-based funds without needing a separate PMS license. The regulator flagged risks such as resource diversion, fee disparities, and insider trading, and recommended safeguards including personnel segregation, transparent fee structures, and regular performance disclosures. It also permitted AMCs and their subsidiaries to expand into ancillary services like pension fund distribution and global fund marketing, subject to regulatory oversight.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Forex Reserves	11-Jul-25
Credit Growth	11-Jul-25
Deposit Growth	11-Jul-25
Loans and Advances to Central Government	11-Jul-25
Loans and Advances to State Government	11-Jul-25
CPI Inflation (Jun 2025)	14-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	0.15	1.28	6.44	2.90	18.16	19.67
Mid Cap Fund	-0.22	0.81	3.85	2.55	25.40	28.40
Large & Mid Cap Fund	-0.04	0.83	5.11	3.43	22.27	24.27
Small Cap Fund	0.57	1.73	1.40	1.78	25.38	32.89
Multi Cap Fund	0.29	1.34	4.33	3.45	23.51	26.05
Focused Fund	0.10	0.89	5.29	3.09	19.49	20.87
Value Fund	0.39	1.26	4.62	1.14	23.81	25.66
Contra Fund	0.45	1.64	5.13	3.43	24.66	27.34
ELSS	0.24	1.17	4.78	2.50	21.14	24.19
Sectoral	0.31	1.36	6.03	5.96	23.70	25.07
Thematic	0.32	1.35	3.11	0.81	21.87	23.31
Dividend Yield Fund	0.46	1.22	4.72	0.24	22.95	25.30

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	5.09	5.11	5.91	6.26	6.34	5.09
Liquid Fund	5.78	5.76	6.94	7.07	6.87	5.46
Ultra Short Duration Fund	5.87	5.68	7.69	7.31	6.75	5.48
Low Duration Fund	7.01	5.16	8.73	8.02	7.11	5.78
Money Market Fund	5.21	5.64	8.49	7.86	7.20	5.74
Short Duration Fund	7.70	2.22	10.02	9.06	7.46	6.01
Medium Duration Fund	15.15	4.42	10.76	9.67	8.13	6.82
Medium to Long Duration Fund	0.67	-0.07	9.07	8.41	7.49	5.38
Long Duration Fund	-8.28	-4.86	6.77	7.39	8.88	5.35
Corporate Bond Fund	6.53	1.45	10.39	9.36	7.59	6.00
Gilt Fund	-6.39	-2.88	7.78	7.82	7.60	5.32
Gilt Fund with 10 year constant duration	-2.21	2.39	11.52	10.43	8.83	5.56
Dynamic Bond	1.12	-1.05	8.90	8.47	7.58	5.74
Banking and PSU Fund	6.17	0.56	9.97	8.97	7.40	5.89
Floater Fund	7.96	3.95	9.77	9.00	7.81	6.29
Credit Risk Fund	9.66	5.20	14.26	11.34	8.67	9.37

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	0.11	0.50	3.25	6.70	6.68	5.39
Balanced Advantage	0.19	0.86	4.71	4.40	13.90	13.21
Aggressive Hybrid Fund	0.18	1.06	5.46	4.59	17.45	18.78
Equity Savings	0.12	0.62	4.15	6.29	10.94	11.08
Conservative Hybrid Fund	0.13	0.34	4.60	7.16	10.02	9.70
Multi Asset Allocation	0.11	0.80	7.29	6.24	17.12	19.23

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

Source: MFI 360 Explorer

Event	Date
WPI Inflation (Jun 2025)	14-Jul-25
Reserve Money	16-Jul-25
Money Supply	23-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