



11 July 2025

INDIAN EQUITY MARKET

- Indian equity markets declined as intensifying global trade disputes dampened investor confidence. Fresh tariff threats from the U.S. President have undermined expectations of a swift resolution to the trade conflict, sparking fears that increased duties could fuel inflation and trigger a worldwide economic downturn. Further exacerbating the downbeat market sentiment, the commencement of the earnings season was marked by underwhelming performance, as India's major IT company reported first-quarter FY26 results that fell short of market expectations.
- Key benchmark indices BSE SENSEX and Nifty 50 lost 0.83% and 0.81% to close at 82,500.47 and 25,149.85 respectively.

CORPORATE NEWS

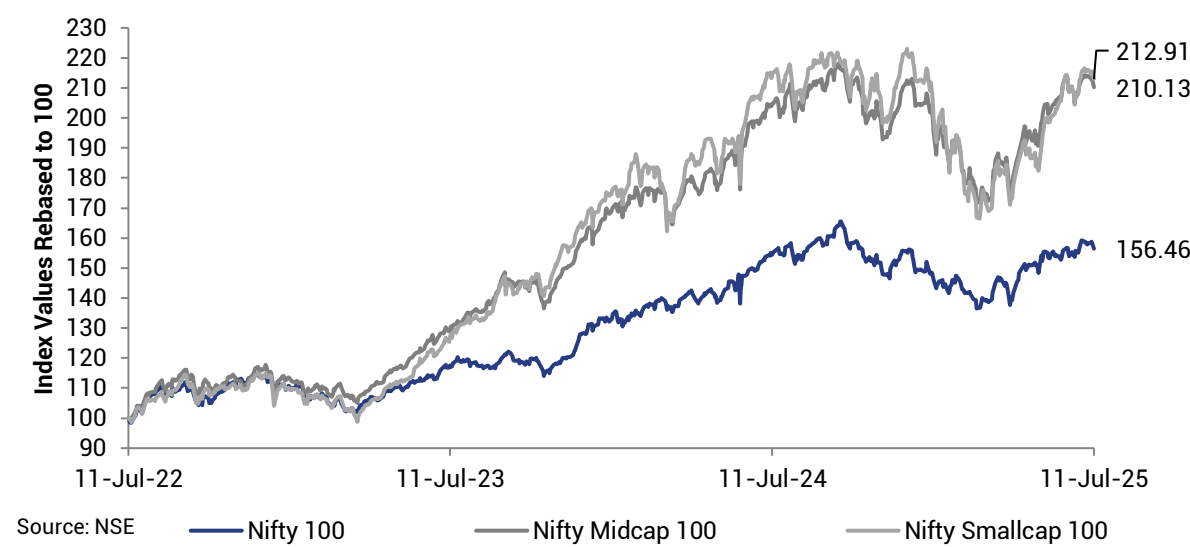
- Adani Green Energy Ltd announced on that its operational renewable energy generation capacity increased by 45% to 15,816 MW during the Jun 2025 quarter compared to the same period last year.
- VinFast, the electric vehicle manufacturer from Vietnam, announced that it has entered into an agreement with BatX Energies for the recycling and repurposing of high voltage batteries in India.
- Kinetic Green announced on its intention to broaden its operations by introducing three new e-scooters within the next 18 months. The company indicated in a statement that the first of these three products is anticipated to be released during the festive season of this year.
- Nipponply Industries, located in Gujarat, announced its plan to invest Rs. 250 crore over the next three years. This investment aims to enhance production for exports, develop e-commerce infrastructure, and set up warehousing and design centres.

GLOBAL EQUITY MARKET

- U.S. equity markets declined amid renewed concerns over the U.S. President's escalating trade disputes. Overall trading activity appeared somewhat subdued, likely due to the absence of major U.S. economic data, which may have kept some investors on the sidelines.
- European equity markets also fell as trade war fears resurfaced following the U.S. President's announcement of a 35% tariff on Canadian goods, effective Aug 01, 2025. He also warned of a blanket tariff of 15–20% on most trading partners.
- Asian equity markets mostly rose despite the U.S. President announced a 35% tariff on Canadian goods, effective Aug 1, 2025, and warned of a blanket tariff of 15-20% on most trading partners that haven't got letters yet. Today (as of July 14), Asian markets opened lower as investors assessed the 30% tariffs on the European Union and Mexico imposed by the U.S. President over the weekend.

INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 25,223.40, a premium of 73.55 points above the spot closing of 25,149.85. The turnover on NSE's Futures and Options segment fell to Rs.7,235.99 crore on July 11, 2025, compared with Rs. 2,97,772.12 crore on July 10, 2025.
- The NSE Put-Call ratio stood at 0.92 compared with the previous session's close of 0.94.



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	25,150	-0.81	0.03	3.43	6.37	26,277	21,744	22.64	21.94
Nifty 100	25,761	-0.81	-0.18	1.29	5.17	27,336	22,177	22.49	22.51
Nifty 500	23,283	-0.80	-0.24	1.21	4.05	24,573	19,520	24.97	23.82
Nifty Midcap 100	58,642	-0.88	-1.26	2.61	2.52	60,926	46,866	33.04	30.20
Nifty Smallcap 250	17,645	-0.70	0.66	-0.26	-0.60	18,688	13,315	33.52	25.62
Nifty SME Emerge	15,011	-0.10	2.04	0.14	-9.61	17,224	11,930	32.60	48.11

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	23,494	-1.77	-1.31	-6.98	2.89	27,696	19,317	24.52	29.42
Nifty Bank	56,755	-0.35	0.52	8.58	11.59	57,628	47,703	15.05	15.74
Nifty FMCG	55,910	0.51	0.16	-6.06	-1.57	66,439	50,199	42.20	43.79
Nifty IT	37,693	-1.78	-2.81	0.97	-13.02	46,089	30,919	27.82	28.54
Nifty Media	1,704	-1.61	-1.51	-16.12	-6.25	2,182	1,344	588.32	719.28
Nifty Metal	9,383	-0.43	-1.19	-3.50	8.47	10,322	7,690	19.07	21.04
Nifty Pharma	22,226	0.68	0.77	7.88	-5.07	23,908	19,121	31.88	34.09
Nifty Realty	963	-1.21	-6.26	-13.24	-8.50	1,140	766	47.30	50.48
Nifty Energy	36,098	-0.96	-1.44	-15.57	2.59	45,022	29,313	16.06	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	26,853	-0.49	0.24	13.79	14.21	27,370	22,358	17.78	17.71
Nifty India Consumption	11,621	-0.90	0.06	2.54	2.28	13,058	10,091	40.73	42.99
Nifty Infrastructure	9,257	-1.11	1.02	-0.08	9.37	9,704	7,590	24.07	21.39
Nifty MNC	28,940	-0.06	0.95	-6.55	3.61	32,841	23,981	34.22	43.95
Nifty Public Sector Enterprises	10,046	-0.61	-0.85	-11.95	5.39	11,815	7,956	12.88	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	22,781	-0.21	4.21	12.71	8.42	22,915	16,542	34.89	28.72
Nasdaq Composite	20,586	-0.22	4.94	12.59	6.60	20,655	14,784	32.16	20.91
FTSE 100	8,941	-0.38	0.87	8.73	9.40	8,984	7,545	16.91	11.97
CAC 40	7,829	-0.92	0.69	2.65	6.08	8,258	6,764	17.04	13.21
DAX	24,255	-0.82	1.28	30.87	21.83	24,639	17,025	19.01	23.43
Nikkei	39,570	-0.19	2.99	-6.29	-0.81	41,755	30,793	18.92	18.17
Hang Seng	24,140	0.46	-0.93	35.37	20.34	24,874	16,441	11.13	9.93
SSE Composite Index	3,510	0.01	3.17	18.17	4.73	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	25,223.40	25,421.90	-0.78
Near Basis	73.55	66.65	10.35
Mid Futures	25,327.50	25,532.20	-0.80
Mid Basis	177.65	176.95	0.40
Near Open Interest (Cr.)	1.35	1.35	-0.11
Mid Open Interest (Cr.)	0.39	0.38	4.82
Rollover (%)	24.24	23.18	4.60

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	12,025	11,185	840	3,839	-74,061
Mutual Funds**	9,838	9,127	711	4,935	237,987

\*As on 11th July 2025;\*\*As on 9th July 2025; Source: SEBI, NSDL

INDIAN ECONOMY

- The National Highways Authority of India intends to auction 124 highway and expressway projects worth Rs. 3.4 lakh crore in 2025–26, covering a total of 6,376 km. While the Gorakhpur–Siliguri corridor will be developed under the Hybrid Annuity Model (HAM), the Tharad–Ahmedabad stretch will follow the Build-Operate-Transfer (BOT) model.
- The U.S. has criticized India's dairy import rules at the World Trade Organization, calling them unscientific trade barriers. The certification requires proof that milk products are free from harmful substances. The issue has surfaced during ongoing trade talks between the two countries.
- The RBI is actively observing global cryptocurrency trends, particularly in light of the U.S. President's evolving stance. As India prepares to publish a crypto policy paper, the RBI continues to advocate for UPI as a robust digital payment solution. Simultaneously, it is advancing its own Central Bank Digital Currency initiative while expressing concerns over the potential risks cryptocurrencies pose to financial stability.

INDIAN DEBT MARKET

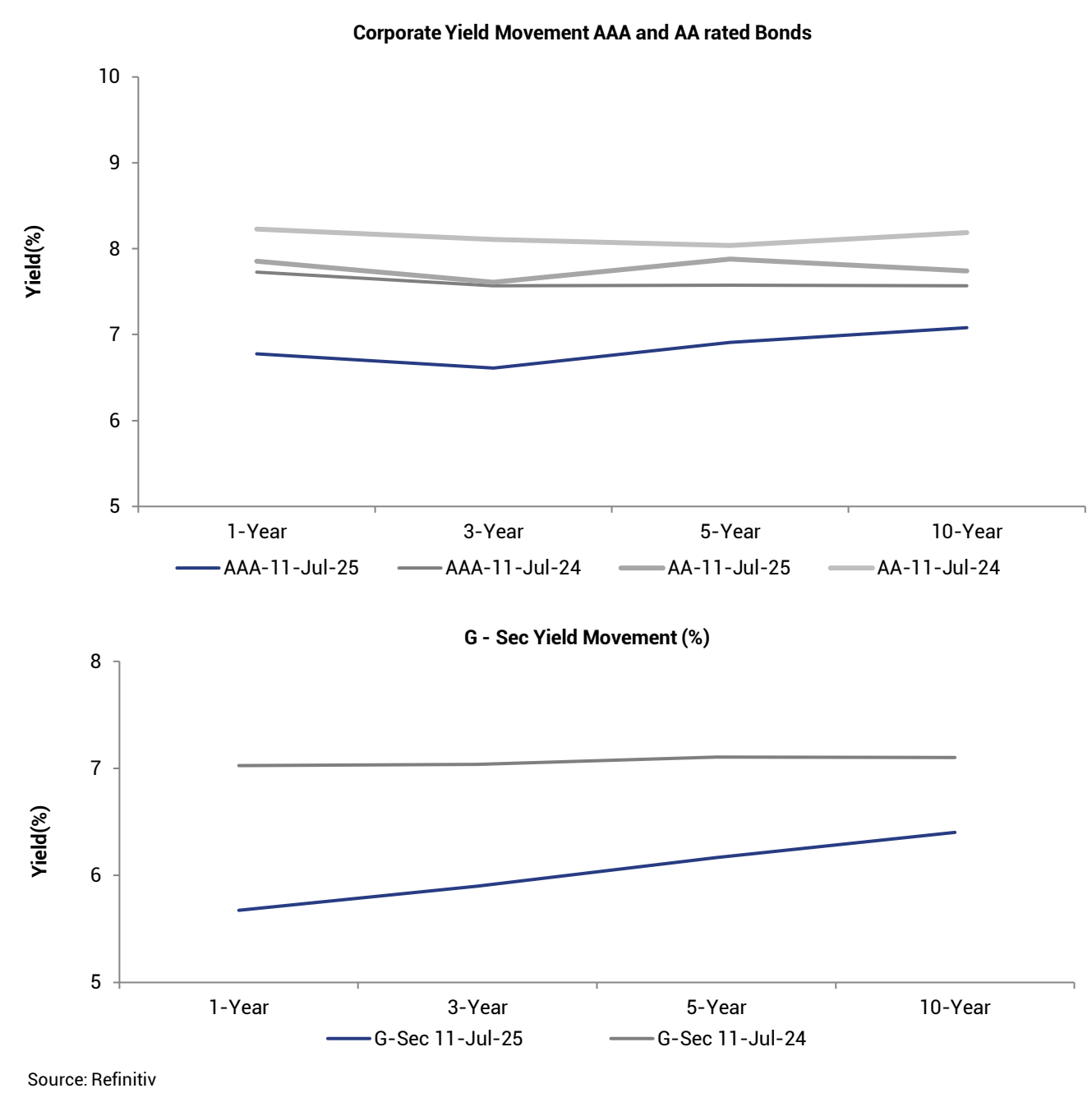
- Bond yields declined, led by a sharp rally in very long-term notes, as stronger-than-expected demand at the auction boosted investor appetite.
- Yield on the 10-year benchmark paper (6.33% GS 2035) fell by 2 bps to close at 6.30% as compared to the previous close of 6.32%.
- Reserve Bank of India conducted the auction of two government securities namely New GS 2032 and 7.09% GS 2074 for a notified amount of Rs. 25,000 crore, for which full amount was accepted. The cut-off price/implicit yield at cut-off for New GS 2032 and 7.09% GS 2074 stood at 6.28% and Rs. 99.12/7.1541%, respectively.
- RBI conducted the auction of 7-day Variable Rate Reverse Repo for the notified amount of Rs. 2,50,000 crore for which amount of Rs. 1,51,633 crore was accepted and the cut-off yield stood at 5.49%.
- Reserve Bank of India announced the auction of 91 days, 182 days and 364 days Treasury Bills for an aggregate amount of Rs. 20,000 crore. The auction would be carried out on Jul 16, 2025.

MONEY MARKET

- Reserve Bank of India announced the auction of government securities for twelve states for a notified amount of Rs. 26,900 crore. The auction would be carried out on Jul 15, 2025.
- Data from Reserve Bank of India showed that India's foreign exchange reserves decreased to \$699.74 billion for the week ended Jul 04, 2025 compared with \$702.78 billion a week earlier.

SPREAD ANALYSIS

- Yields on gilt fell up to 4 bps across the maturities, barring 5 to 6 year papers that rose by 1 bps each and 1 year paper that rose by 5 bps, while 4 year paper was unchanged.
- Corporate bond yields increased between 2 to 5 bps across the curve, barring 8, 9 & 10 year papers that fell by 2, 4 & 5 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 27,2025)	9.50%	9.60%
Deposit Growth (Jun 27,2025)	10.10%	10.40%
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 (%)	11-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 (%)	11-Jul-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.51	5.31	5.35	6.55
CALL	5.45	5.29	5.31	6.47
T-Repo	5.30	5.18	5.20	6.38
OIS- 3 M	5.47	5.41	5.45	6.66
OIS- 6 M	5.50	5.46	5.49	6.71

Source: FBIL

Certificate of Deposit (%)	11-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.81	5.78	5.80	7.05
6-Month	5.96	5.92	6.16	7.45
9-Month	6.07	6.04	6.25	7.53
12-Month	6.24	6.22	6.37	7.69

Source: Refinitiv

Commercial Paper (%)	11-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.82	5.84	5.85	7.17
6-Month	6.10	6.00	6.28	7.44
12-Month	6.30	6.25	6.38	7.64

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	5.60	5.55	5.63	6.91	5	-3	-131
3 Yr GOI Bond	5.82	5.82	5.79	6.92	-1	3	-110
5 Yr GOI Bond	6.08	6.07	5.98	6.98	1	9	-91
10 Yr GOI Bond	6.30	6.32	6.30	6.98	-1	1	-68
15 Yr GOI Bond	6.63	6.65	6.66	7.02	-2	-3	-39
US 10 Yr Treasury	4.42	4.35	4.41	4.19	8	1	23

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	11-Jul-25	1 Month Avg.	1 Year Avg.	11-Jul-25	1 Month Avg.	1 Year Avg.
1 Yr	110	115	91	218	208	149
3 Yr	71	103	75	171	174	139
5 Yr	74	93	68	171	169	122
10 Yr	68	77	51	134	137	105

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	11-Jul-25	Week Ago	Month Ago	Year Ago
Govt Securities	73,148	52,498	65,409	38,361
Call Money	15,690	15,184	15,257	10,083
T-Repo	401,113	417,812	383,942	343,655
LAF	NA	NA	NA	NA
Treasury Bills	3,370	3,159	16,714	6,422
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*	651	314	336	1,329	2,287
Mutual Funds**	10,066	13,040	-2,974	13,500	-310,608

\*As on 11th July 2025;\*\*As on 9th July 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: July 7-11 ,2025	25,000	25,000	100.00%
Month: Jul 2025	120,000	57,000	47.50%
H1: Apr 25-Sep 25	800,000	458,000	57.25%

Source: RBI



GLOBAL ECONOMY

- The U.K. gross domestic product fell by 0.1% in May 2025, subsequent to a 0.3% decrease in Apr 2025, as disclosed by data from the Office for National Statistics.

INTERNATIONAL MARKET UPDATE

- Germany's wholesale prices grew 0.9% YoY in Jun 2025, primarily driven by rising costs of food and beverages, following a 0.4% rise in Apr 2025, as reported by Destatis.

COMMODITY MARKET

- Gold prices increased as the U.S. President intensified tariff pressures on U.S. trade partners, boosting safe-haven demand.
- Brent crude oil prices (spot) rose, supported by strong seasonal demand and lingering geopolitical risks in the Middle East.

CURRENCY UPDATE

- The Indian rupee fell in spot trading against the U.S. dollar due to trade uncertainty and foreign portfolio outflows.
- The euro weakened against the U.S. dollar as renewed trade tensions emerged from the U.S.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,355	0.99	0.07	38.96	27.89	3,432	2,364
Silver (\$/oz)	38	3.61	5.91	22.05	32.87	38	27
NYMEX Crude(\$/bbl)	70	2.73	1.19	-17.05	-3.88	84	58
Brent Crude(\$/bbl)	74	1.79	4.11	-16.34	-3.89	89	62
Baltic Dry Index	1,663	13.52	-4.32	-14.59	66.80	2,110	715
Core Commodity Index	373	1.06	0.50	9.36	4.63	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)	97,095	0.62	1.30	33.88	27.90	98,931	67,884
Silver (1 kg)	110,253	2.84	4.50	19.91	28.42	110,253	78,617
Crude Oil (1 bbl)	5,697	-2.90	2.43	-16.89	-6.10	7,249	1,277
Natural Gas (1 mmbtu)	286	3.55	-5.56	46.84	-15.10	392	138
Aluminium (1 kg)	250	0.26	3.11	8.45	3.20	267	209
Copper (1 kg)	884	-0.37	0.93	1.52	10.73	934	772
Nickel (1 kg)	1,323	-0.19	-0.82	-8.00	-1.17	1,783	1,276
Lead (1 kg)	183	-0.38	-0.92	-7.67	-2.53	201	179
Zinc (1 kg)	261	-0.23	1.93	-6.88	-8.12	301	241
Mentha Oil (1 kg)	931	-0.18	-0.81	-5.63	-6.33	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	85.80	0.19	0.34	2.68	0.22	87.95	83.44
EUR/INR	100.29	0.00	2.19	10.51	13.23	101.17	87.29
GBP/INR	115.82	-0.45	0.09	7.42	8.21	117.95	104.67
YEN(100)/INR	58.20	-0.70	-1.53	10.68	6.94	60.83	51.60
SGD/INR	66.99	0.00	0.76	7.73	6.94	67.61	61.85

Source: Refinitiv

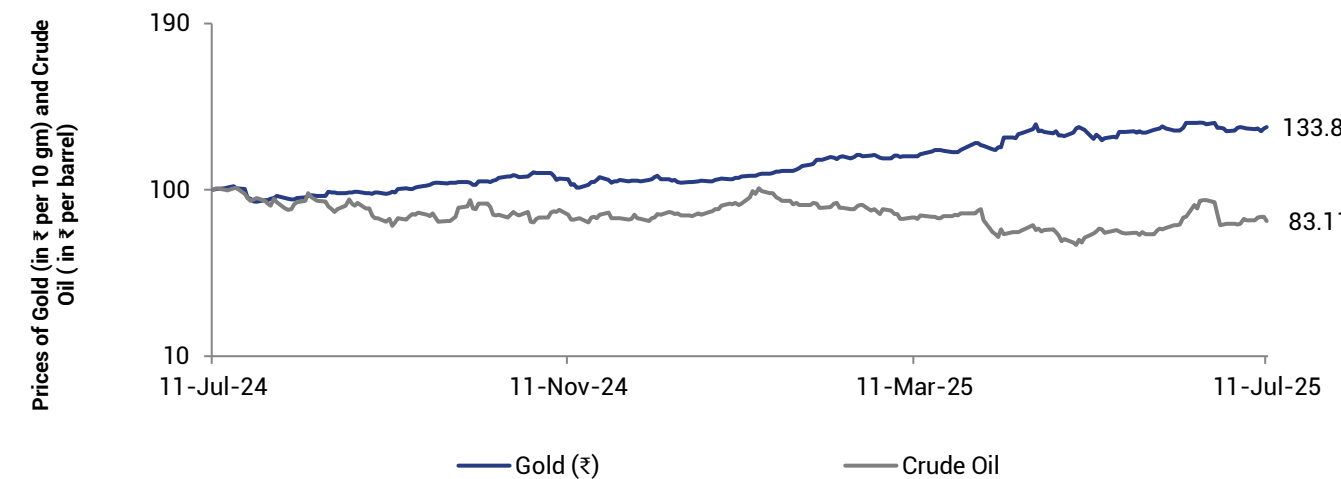
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	-0.09	1.76	7.58	12.90	1.18	1.01
GBP/USD	1.35	-0.55	-0.33	4.57	7.90	1.38	1.21
USD/JPY	147.40	0.79	1.98	-7.18	-6.22	161.75	139.56
SGD/USD	0.78	-0.03	0.31	4.88	6.66	0.78	0.73
Dollar Index	97.85	0.21	-0.79	-6.31	-9.80	110.18	96.38

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	85.84	0.09	-0.05	0.32	-0.42
Future 3 Month	86.15	-0.02	0.19	0.21	-0.68
Future 6 Month	87.09	0.06	1.02	0.76	0.12
NDF 1 Month	85.92	0.12	0.06	0.46	-0.43
NDF 3 Month	86.15	0.10	-0.22	0.44	-0.54
NDF 6 Month	86.58	0.10	-0.32	0.51	-0.52

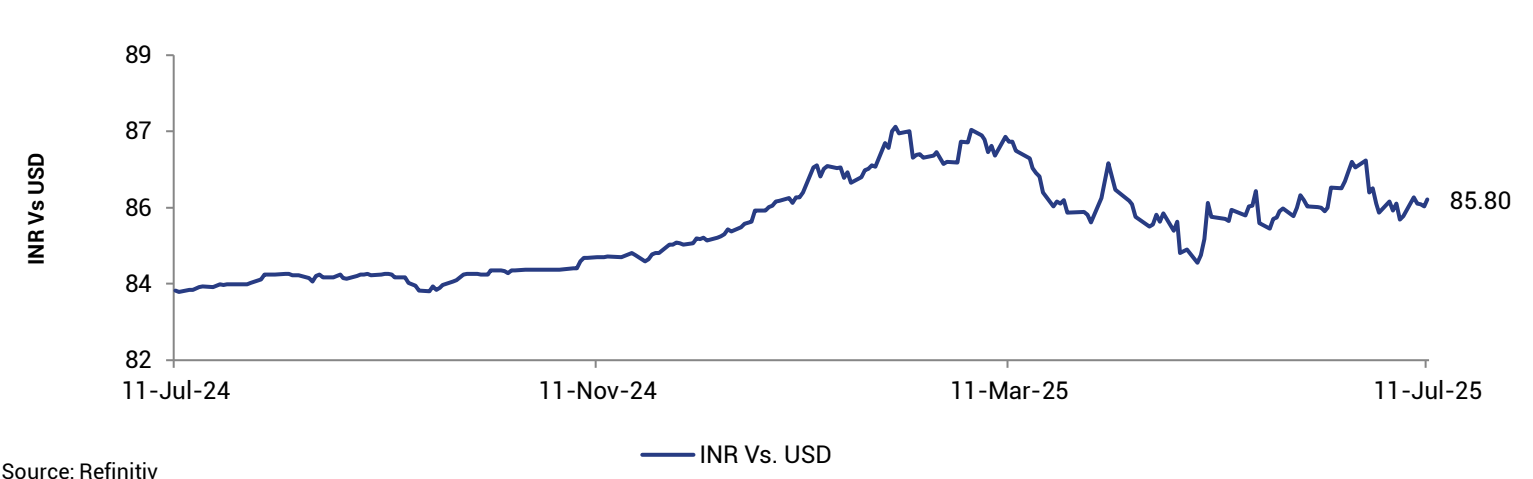
Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)



Source: MCX-SX

RUPEE VS. U.S. DOLLAR

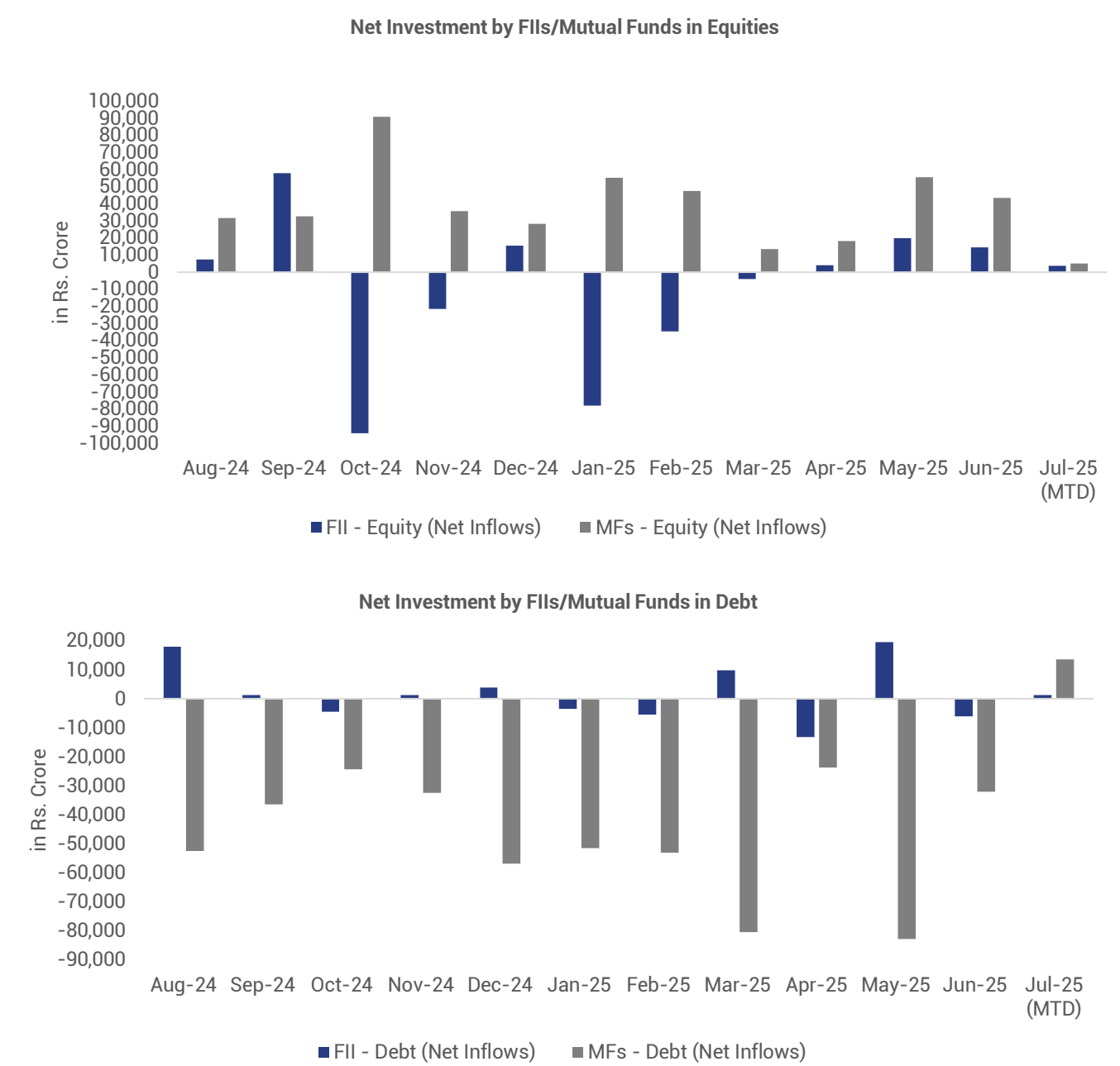


Source: Refinitiv

MUTUAL FUND AND INSURANCE UPDATE

- According to AMFI, the monthly SIP contribution reached a new high in Jun 2025, standing at Rs. 27,269 crore. SIP AUM increased to Rs. 15.31 lakh crore in Jun 2025, compared to Rs. 14.61 lakh crore in May 2025, with 919.32 lakh outstanding SIP accounts.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
CPI Inflation (Jun 2025)	14-Jul-25
WPI Inflation (Jun 2025)	14-Jul-25
Reserve Money	16-Jul-25
Forex Reserves	18-Jul-25
Loans and Advances to Central Government	18-Jul-25
Loans and Advances to State Government	18-Jul-25

MF SCHEMES CATEGORY WISE PERFORMANCE

Category-Equity	1 Week	1 Month	6 Month	1 Year	3 Year	5 Year
Large Cap Fund	-1.01	0.13	6.19	2.02	17.72	19.48
Mid Cap Fund	-1.16	0.02	4.70	1.76	24.72	28.22
Large & Mid Cap Fund	-0.99	0.00	5.56	2.70	21.77	24.13
Small Cap Fund	-0.42	1.07	3.09	1.32	24.86	32.83
Multi Cap Fund	-0.84	0.46	4.98	2.66	22.96	25.85
Focused Fund	-0.90	0.02	5.56	2.33	19.10	20.73
Value Fund	-0.72	0.29	5.15	0.46	23.37	25.58
Contra Fund	-0.63	0.82	5.63	2.69	24.25	27.23
ELSS	-0.96	0.28	5.23	1.74	20.69	24.03
Sectoral	-0.77	0.48	6.98	5.21	23.31	25.00
Thematic	-0.80	0.35	3.56	-0.01	21.50	23.16
Dividend Yield Fund	-0.75	0.04	4.90	-0.71	22.72	25.17

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	5.10	5.12	5.89	6.25	6.34	5.09
Liquid Fund	5.20	5.76	6.92	7.05	6.88	5.46
Ultra Short Duration Fund	5.09	6.38	7.64	7.29	6.75	5.47
Low Duration Fund	5.17	6.38	8.68	7.99	7.11	5.77
Money Market Fund	4.80	6.76	8.45	7.84	7.20	5.74
Short Duration Fund	3.86	5.18	9.98	9.01	7.47	5.98
Medium Duration Fund	13.06	7.77	10.73	9.63	8.15	6.78
Medium to Long Duration Fund	7.08	4.02	9.27	8.45	7.55	5.35
Long Duration Fund	13.51	2.71	7.49	7.62	9.04	5.30
Corporate Bond Fund	3.85	5.08	10.34	9.32	7.61	5.97
Gilt Fund	8.40	3.54	8.24	7.97	7.71	5.32
Gilt Fund with 10 year constant duration	2.12	6.10	11.66	10.46	8.91	5.53
Dynamic Bond	6.81	3.70	9.13	8.52	7.63	5.72
Banking and PSU Fund	2.91	4.10	9.92	8.94	7.41	5.84
Floater Fund	6.15	6.18	9.80	8.98	7.83	6.26
Credit Risk Fund	5.26	6.94	14.12	11.27	8.67	9.33

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	0.55	3.21	6.72	6.70	5.38
Balanced Advantage	-0.51	0.29	4.67	3.80	13.62	13.09
Aggressive Hybrid Fund	-0.77	0.25	5.49	3.89	17.09	18.64
Equity Savings	-0.20	0.46	4.18	6.04	10.83	11.05
Conservative Hybrid Fund	-0.08	0.35	4.66	7.01	9.96	9.65
Multi Asset Allocation	-0.20	0.59	7.61	5.97	17.04	19.18

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

Source: MFI 360 Explorer

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