



15 July 2025

INDIAN EQUITY MARKET

- Indian equity markets snapped a four-day losing streak, supported by positive global cues amid optimism that the U.S. President may soften his stance before the proposed measures take effect on Aug 1, 2025. The rally gained further momentum after domestic retail inflation eased to 2.1% in Jun 2025, the lowest level in over six years, raising hopes of more rate cuts by the RBI in the coming months and boosting investor sentiment.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.39% and 0.45% to close at 82,570.91 and 25,195.80 respectively.
- On the BSE sectoral front, Auto was the major gainer, up 1.48% followed by Healthcare, up 1.14% and Consumer Discretionary, up 0.89%. Utilities was the only loser, down 0.15%.

CORPORATE NEWS

- Aurobindo Pharma announced that it will manufacture and supply the long-acting injectable HIV treatment, cabotegravir, across 133 countries. The Hyderabad-based drugmaker has been selected as one of the generic manufacturers under the expanded voluntary licensing agreement between the Medicines Patent Pool (MPP) and ViiV Healthcare.
- Tata Steel's steelmaking site in the UK is set for a new beginning, as construction of an electric arc furnace (EAF) gets underway marking a significant shift toward low-carbon steel production.
- Rail Vikas Nigam announced that it has secured an order from the Delhi Metro Rail Corporation. The project is valued at Rs. 447,42,48,757.33, inclusive of 18% GST.

GLOBAL EQUITY MARKET

- U.S. equity markets mostly declined as concerns over inflation and a mixed set of earnings from major banks weighed on investor sentiment, dragging the blue-chip index lower. Sentiment was further dampened by fears surrounding the impact of new tariffs imposed by the U.S. President.
- European equity markets fell despite some optimism that the European Union may reach a trade agreement with the U.S. in the coming weeks. Investor sentiment was hurt by data showing a pickup in U.S. inflation in Jun 2025.
- Asian equity markets rose as investors shrugged off tariff threats from the U.S. President and responded positively to China's GDP data for the first half of 2025. Today (as of July 16), Asian markets opened mixed following the U.S. President's announcement of tariffs on Indonesia.

INDIAN DERIVATIVES MARKET

- Nifty Jul 2025 Futures stood at 25,265.60, a premium of 69.80 points above the spot closing of 25,195.80. The turnover on NSE's Futures and Options segment fell to Rs.5,891.61 crore on July 15, 2025, compared with Rs. 3,58,767.58 crore on July 14, 2025.
- The NSE Put-Call ratio stood at 0.77 compared with the previous session's close of 0.89.

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	25,196	0.45	1.93	2.48	6.56	26,277	21,744	22.67	21.95
Nifty 100	25,849	0.49	2.04	0.60	5.53	27,336	22,177	22.56	22.53
Nifty 500	23,449	0.60	2.37	1.03	4.80	24,573	19,520	25.14	23.84
Nifty Midcap 100	59,613	0.95	2.38	3.38	4.22	60,926	46,866	33.60	30.26
Nifty Smallcap 250	17,952	0.81	4.31	1.18	1.13	18,688	13,315	34.07	25.68
Nifty SME Emerge	15,063	0.08	3.19	0.62	-9.29	17,224	11,930	32.54	47.32

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	23,905	1.50	2.48	-5.96	4.69	27,696	19,317	24.95	29.26
Nifty Bank	57,007	0.43	2.66	8.68	12.09	57,628	47,703	15.11	15.73
Nifty FMCG	56,429	0.72	3.49	-6.06	-0.65	66,439	50,199	42.59	43.80
Nifty IT	37,425	0.40	-2.72	-3.82	-13.64	46,089	30,919	27.52	28.55
Nifty Media	1,736	0.48	0.56	-17.57	-4.51	2,182	1,344	599.21	715.90
Nifty Metal	9,412	0.04	1.65	-3.26	8.81	10,322	7,690	19.13	21.12
Nifty Pharma	22,666	1.14	3.10	8.74	-3.19	23,908	19,121	32.51	34.07
Nifty Realty	984	0.79	-2.29	-11.19	-6.50	1,140	766	48.34	50.44
Nifty Energy	36,309	0.30	1.59	-16.15	3.18	45,022	29,313	16.15	13.68

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	26,929	0.47	2.25	13.66	14.53	27,370	22,358	17.83	17.70
Nifty India Consumption	11,750	0.72	3.31	2.84	3.41	13,058	10,091	41.18	43.01
Nifty Infrastructure	9,288	0.39	3.52	-0.60	9.74	9,704	7,590	24.15	21.44
Nifty MNC	29,190	0.45	3.57	-5.98	4.50	32,841	23,981	34.52	43.86
Nifty Public Sector Enterprises	10,070	0.25	1.85	-12.55	5.64	11,815	7,956	12.91	10.22

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	22,885	0.13	5.80	12.25	8.91	23,052	16,542	34.94	28.83
Nasdaq Composite	20,678	0.18	6.55	11.94	7.08	20,836	14,784	32.18	20.95
FTSE 100	8,938	-0.66	0.99	9.23	9.36	9,017	7,545	17.04	11.97
CAC 40	7,766	-0.54	1.06	1.75	5.22	8,258	6,764	16.99	13.25
DAX	24,060	-0.42	2.31	29.42	20.85	24,639	17,025	18.94	23.50
Nikkei	39,678	0.55	4.87	-3.67	-0.54	41,520	30,793	18.99	18.19
Hang Seng	24,590	1.60	2.92	36.49	22.58	24,874	16,441	11.34	9.93
SSE Composite Index	3,505	-0.42	3.79	17.85	4.57	3,674	2,690	12.00	12.13

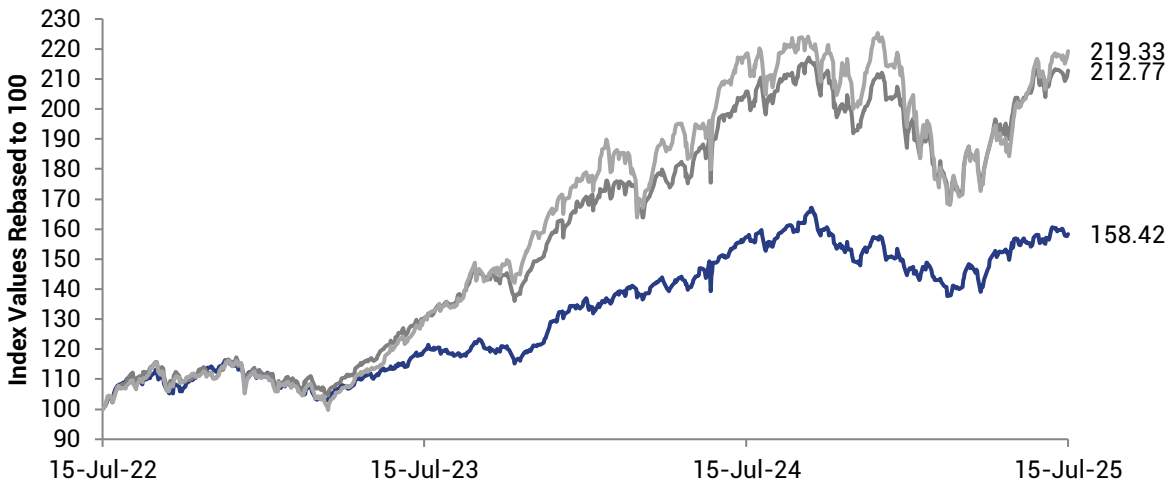
Source: MFI 360 Explorer; Returns are based in local currency

F&O Trends	Px Last	Previous	Change %
Near Futures	25,265.60	25,167.50	0.39
Near Basis	69.80	85.20	-18.08
Mid Futures	25,367.70	25,268.80	0.39
Mid Basis	171.90	186.50	-7.83
Near Open Interest (Cr.)	1.37	1.37	-0.28
Mid Open Interest (Cr.)	0.45	0.44	2.28
Rollover (%)	26.58	26.12	1.75

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	18,434	19,224	-789	-1,446	-79,346
Mutual Funds**	0	0	0	8,310	241,362

*As on 15th July 2025;**As on 12th July 2025; Source: SEBI, NSDL



Source: NSE

— Nifty 100 — Nifty Midcap 100 — Nifty Smallcap 100

INDIAN ECONOMY

- India's merchandise trade deficit narrowed annually to \$18.78 billion in Jun 2025 compared to \$20.84 billion in Jun 2024. Exports fell by 0.06% YoY to \$35.14 billion in Jun 2025, and imports decreased 3.71% YoY to \$53.92 billion during the same period.
- The National Highways Authority of India (NHAI), in its Sustainability Report 2023-24, announced the use of over 631 lakh metric tonnes of recycled and reused materials such as fly ash, plastic waste, and reclaimed asphalt in national highway construction during 2023-24, reinforcing its commitment to promoting a circular economy.
- The RBI has launched its quarterly Industrial Outlook Survey (IOS) for the manufacturing sector alongside the 46th round of the Services and Infrastructure Outlook Survey (SIOS) to assess current business conditions and future expectations across demand, finance, employment, and pricing, with projections for upcoming quarters.

INDIAN DEBT MARKET

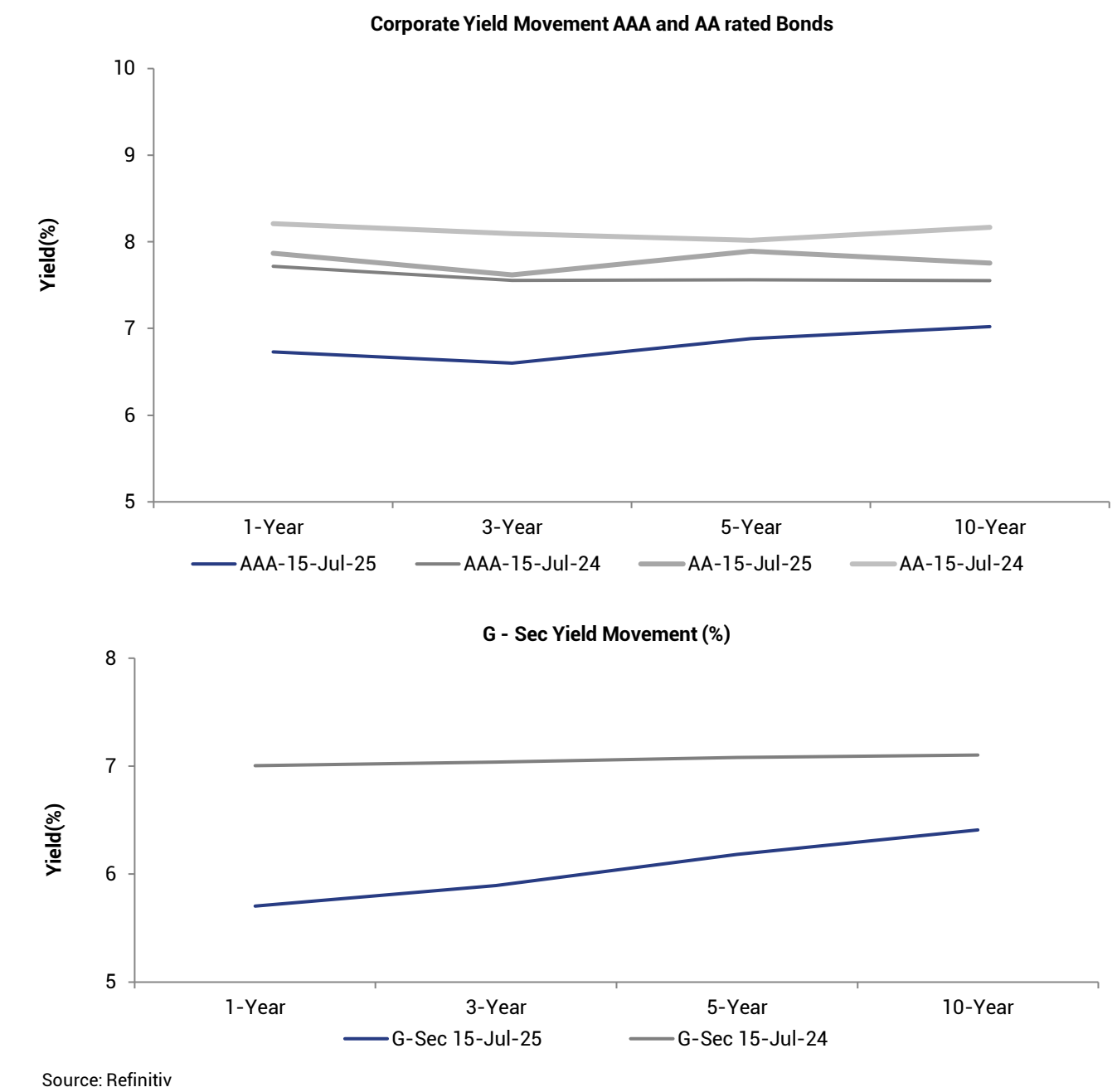
- Bond yields remained largely steady as the RBI conducted a short-term liquidity operation to drain excess cash from the banking system, offsetting the supportive impact of lower domestic inflation data for Jun 2025.
- Yield on the 10-year benchmark paper (6.33% GS 2035) was unchanged to close at 6.31% as compared to the previous day's close.
- Reserve Bank of India conducted an auction of government securities for twelve states, with a notified amount of Rs. 26,900 crore, out of which full amount was accepted. The cut-off yields ranged from 6.80% to 7.19%, with the lowest yield observed for Gujarat and the highest for Punjab.

MONEY MARKET

- RBI conducted the auction of 3-day Variable Rate Reverse Repo for the notified amount of Rs. 1,00,000 crore for which amount of Rs. 57,450 crore was accepted and the cut-off yield stood at 5.49%.

SPREAD ANALYSIS

- Yields on gilt were unchanged or moved by 1 bps across the maturities, barring 1, 2 & 11 year papers that rose by 12, 2 & 6 bps, respectively, and 5 year paper that fell by 2 bps.
- Corporate bond yields fell up to 3 bps across the curve, barring 1, 9 & 10 year papers that increased by 1 or 2 bps, while 7 & 8 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 27,2025)	9.50%	9.60%
Deposit Growth (Jun 27,2025)	10.10%	10.40%
WPI (Jun'25)	-0.13%	0.39%
CPI (Jun'25)	2.10%	2.82%
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-Jun25)	18.78	21.88

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 (%)	15-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 (%)	15-Jul-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.44	5.29	5.35	6.55
CALL	5.38	5.26	5.31	6.47
T-Repo	5.30	5.13	5.16	6.34
OIS- 3 M	5.46	5.42	5.46	6.67
OIS- 6 M	5.49	5.47	5.52	6.71

Source: FBIL

Certificate of Deposit (%)	15-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.82	5.68	5.87	7.04
6-Month	5.89	6.00	6.16	7.38
9-Month	6.03	6.05	6.26	7.46
12-Month	6.23	6.17	6.27	7.61

Source: Refinitiv

Commercial Paper (%)	15-Jul-25	Week Ago	Month Ago	Year Ago
3-Month	5.82	5.77	5.92	7.17
6-Month	6.05	6.05	6.25	7.43
12-Month	6.28	6.25	6.42	7.63

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	5.51	5.61	6.89	11	2	-126
3 Yr GOI Bond	5.81	5.81	5.84	6.92	1	-3	-111
5 Yr GOI Bond	6.09	6.11	6.01	6.96	-2	9	-87
10 Yr GOI Bond	6.31	6.31	6.30	6.98	0	1	-67
15 Yr GOI Bond	6.64	6.63	6.66	7.02	1	-2	-37
US 10 Yr Treasury	4.49	4.43	4.42	4.23	6	7	26

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	15-Jul-25	1 Month Avg.	1 Year Avg.	15-Jul-25	1 Month Avg.	1 Year Avg.
1 Yr	103	114	91	216	210	150
3 Yr	71	97	75	172	174	139
5 Yr	70	88	68	171	169	122
10 Yr	61	75	51	134	137	105

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	15-Jul-25	Week Ago	Month Ago	Year Ago
Govt Securities	42,785	38,087	66,394	46,168
Call Money	16,248	18,620	18,288	10,700
T-Repo	395,077	390,354	391,225	364,121
LAF	NA	NA	NA	NA
Treasury Bills	3,281	2,087	9,177	4,813
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*	61	325	-264	1,334	2,292
Mutual Funds**	0	0	0	12,403	-311,705

*As on 15th July 2025;**As on 12th July 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: July 14-18 ,2025	27,000	0	0.00%
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.S. Consumer Price Index (CPI) rose by 0.3% in Jun 2025, following a 0.1% increase in May 2025, according to the Labor Department. The annual rate of consumer price growth accelerated to 2.7% in Jun 2025, up from 2.4% in May 2025. The Labor Department also reported that the core CPI, which excludes food and energy prices, edged up by 0.2% in Jun after a 0.1% increase in May.
- China's gross domestic product (GDP) expanded by 5.2% YoY in the second quarter of 2025, following a 5.4% increase in the previous quarter, according to the National Bureau of Statistics.

INTERNATIONAL MARKET UPDATE

- Eurozone industrial output grew by 1.7% MoM in May 2025, surpassing expectations and rebounding from a 2.2% decline in Apr 2025, according to Eurostat.

COMMODITY MARKET

- Gold prices also fell as market participants awaited updates on tariffs, while the U.S. inflation report showed a widely expected increase in consumer prices for Jun 2025.
- Brent crude oil prices (spot) declined after the U.S. President issued a lengthy 50-day deadline for Russia to end the war in Ukraine.

CURRENCY UPDATE

- The Indian rupee weakened in spot trading against the U.S. dollar, driven by strong demand for the greenback.
- The euro weakened against the U.S. dollar after U.S. consumer prices rose in Jun 2025.

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,322	-0.64	-3.21	37.16	26.62	3,432	2,364
Silver (\$/oz)	38	-1.10	3.93	21.62	30.62	38	27
NYMEX Crude(\$/bbl)	68	-0.63	-8.12	-18.60	-6.47	84	58
Brent Crude(\$/bbl)	72	-0.44	-4.65	-17.79	-5.59	88	62
Baltic Dry Index	1,866	4.66	-5.18	-6.37	87.16	2,110	715
Core Commodity Index	373	-0.22	-1.95	9.82	4.40	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)	97,604	-0.36	-1.14	33.68	28.57	98,931	67,884
Silver (1 kg)	111,813	-1.74	5.57	22.05	30.24	113,788	78,617
Crude Oil (1 bbl)	5,760	-1.99	-1.49	-16.13	-5.06	7,249	1,277
Natural Gas (1 mmbtu)	298	4.75	0.10	53.13	-11.42	392	138
Aluminium (1 kg)	249	-0.30	2.75	7.82	2.68	267	209
Copper (1 kg)	877	-0.52	0.27	1.61	9.95	934	772
Nickel (1 kg)	1,317	-0.83	-0.11	-7.20	-1.60	1,783	1,276
Lead (1 kg)	183	0.36	-1.54	-8.01	-2.69	201	179
Zinc (1 kg)	259	-0.38	2.23	-7.44	-8.83	301	241
Mentha Oil (1 kg)	926	0.33	-2.48	-4.00	-6.91	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	85.81	-0.20	-0.31	2.65	0.23	87.95	83.44
EUR/INR	99.71	-0.58	0.27	9.55	12.57	101.17	87.29
GBP/INR	115.01	-0.39	-1.50	6.16	7.45	117.95	104.67
YEN(100)/INR	57.74	-0.81	-3.35	9.21	6.09	60.83	52.59
SGD/INR	66.86	-0.28	-0.42	7.54	6.74	67.61	62.06

Source: Refinitiv

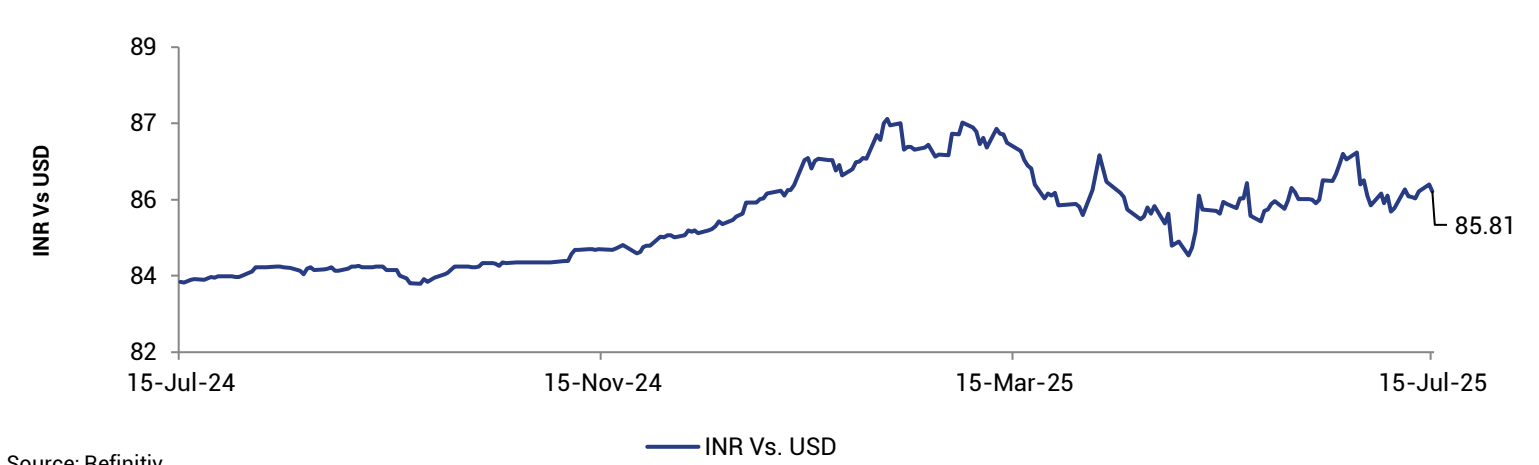
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.16	-0.55	0.41	6.47	12.04	1.18	1.01
GBP/USD	1.34	-0.36	-1.36	3.19	6.94	1.38	1.21
USD/JPY	148.86	0.79	3.31	-5.79	-5.29	158.87	139.56
SGD/USD	0.78	-0.28	-0.31	4.55	6.22	0.78	0.73
Dollar Index	98.62	0.55	0.44	-5.35	-9.10	110.18	96.38

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	85.89	-0.16	0.01	-0.32	0.02
Future 3 Month	86.28	-0.15	0.34	-0.34	-0.03
Future 6 Month	87.07	0.23	1.00	-0.09	0.40
NDF 1 Month	86.07	-0.02	0.23	0.01	0.15
NDF 3 Month	86.31	-0.02	-0.03	-0.17	0.06
NDF 6 Month	86.74	-0.01	-0.14	-0.10	-0.02

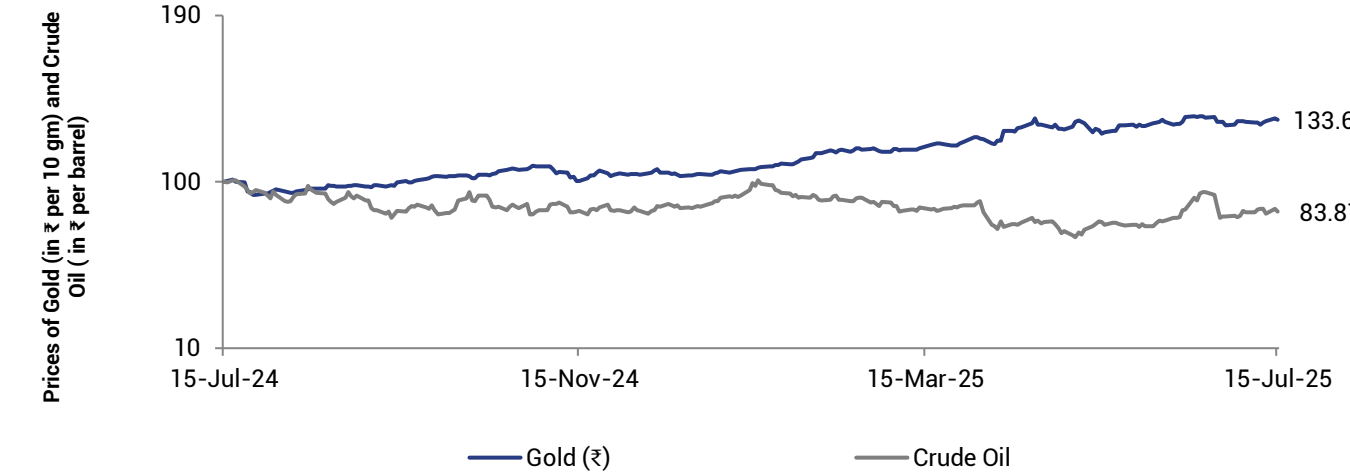
Source: Refinitiv

RUPEE VS. U.S. DOLLAR



Source: Refinitiv

CRUDE OIL VS. GOLD (IN ₹)

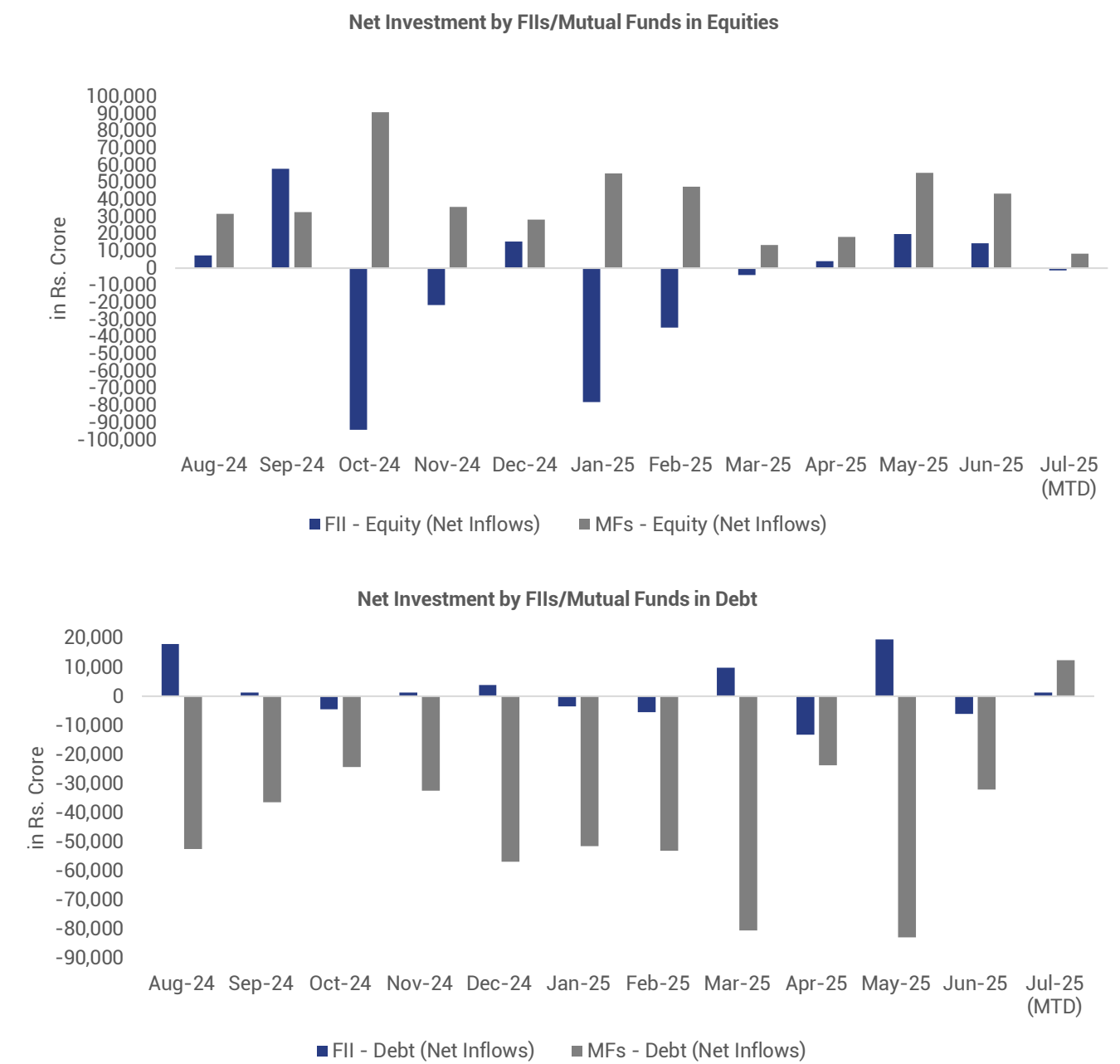


Source: MCX-SX

MUTUAL FUND AND INSURANCE UPDATE

- SEBI has proposed allowing Credit Rating Agencies (CRAs) to rate financial products regulated by other authorities such as RBI, IRDAI, PFRDA, IFSCA, and others. This move could enable CRAs to assess instruments like bank fixed deposits, insurance policies, pension funds, unlisted securities, and IFSCA-regulated offerings. Under the proposal, CRAs must comply with the specific regulations of each product, operate through separate business units for non-SEBI-regulated ratings, and limit their activities to fee-based, non-fund-based services. They must also disclose these activities publicly and submit regular compliance and audit reports to SEBI.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
Reserve Money	16-Jul-25
Currency in Circulation	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
Money Supply	23-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	-0.77	2.28	7.86	1.54	18.21	19.91
Mid Cap Fund	0.47	3.02	8.25	2.55	25.30	28.84
Large & Mid Cap Fund	-0.11	2.57	8.05	2.76	22.31	24.68
Small Cap Fund	1.39	3.93	6.61	2.72	25.58	33.43
Multi Cap Fund	0.22	3.03	7.63	3.02	23.53	26.35
Focused Fund	-0.12	2.49	7.73	2.32	19.66	21.29
Value Fund	-0.05	2.85	6.79	0.28	23.94	26.06
Contra Fund	-0.29	3.07	7.38	2.26	24.74	27.61
ELSS	-0.03	2.72	7.61	1.87	21.27	24.58
Sectoral	0.30	2.88	9.31	5.43	23.84	25.47
Thematic	-0.07	2.70	5.86	0.10	21.82	23.52
Dividend Yield Fund	-0.53	2.10	6.37	-1.30	23.05	25.28

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	5.17	5.14	5.86	6.24	6.34	5.09
Liquid Fund	5.14	5.86	6.88	7.03	6.88	5.47
Ultra Short Duration Fund	5.42	6.60	7.66	7.29	6.76	5.48
Low Duration Fund	5.03	7.17	8.75	7.98	7.11	5.77
Money Market Fund	5.56	7.02	8.47	7.84	7.21	5.75
Short Duration Fund	3.06	6.84	10.20	8.97	7.45	5.98
Medium Duration Fund	3.13	8.75	11.06	9.58	7.72	6.81
Medium to Long Duration Fund	7.49	5.90	9.87	8.43	7.52	5.36
Long Duration Fund	22.86	7.98	9.02	7.74	9.09	5.29
Corporate Bond Fund	3.18	7.02	10.65	9.27	7.59	5.96
Gilt Fund	18.00	7.73	9.50	8.10	7.71	5.37
Gilt Fund with 10 year constant duration	3.37	5.88	12.24	10.38	8.90	5.57
Dynamic Bond	8.96	6.28	10.00	8.53	7.57	5.74
Banking and PSU Fund	2.32	6.28	10.18	8.89	7.40	5.84
Floater Fund	5.40	7.47	10.01	8.95	7.81	6.25
Credit Risk Fund	3.83	8.03	14.41	11.26	8.60	9.32

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	0.10	0.39	3.16	6.66	6.71	5.37
Balanced Advantage	-0.22	1.72	5.85	3.68	13.90	13.32
Aggressive Hybrid Fund	-0.30	2.06	7.15	3.71	17.49	19.00
Equity Savings	-0.06	1.08	4.67	5.92	10.99	11.22
Conservative Hybrid Fund	-0.01	0.96	5.23	6.94	10.03	9.75
Multi Asset Allocation	0.14	1.56	8.57	5.85	17.34	19.39

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

Source: MFI 360 Explorer

Event	Date
Bank Credit to Commercial Sector	23-Jul-25
Credit Growth	25-Jul-25
Deposit Growth	25-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