



13 August 2025

### INDIAN EQUITY MARKET

- Indian equity markets rose after official data showed that consumer price inflation in Jul 2025 eased more than expected, reaching its lowest level in over eight years. This brought inflation below the Reserve Bank of India’s (RBI) tolerance band and raised prospects of another interest rate cut. Firm global cues and a weaker U.S. dollar also supported market sentiment, as in-line U.S. inflation data reinforced expectations of a rate cut by the Federal Reserve in Sep 2025.
- Key benchmark indices BSE SENSEX and Nifty 50 gained 0.38% and 0.54% to close at 80,539.91 and 24,619.35 respectively.
- The overall market breadth on BSE was strong with 2,150 scrips advancing and 1,946 scrips declining. A total of 160 scrips remained unchanged.

### CORPORATE NEWS

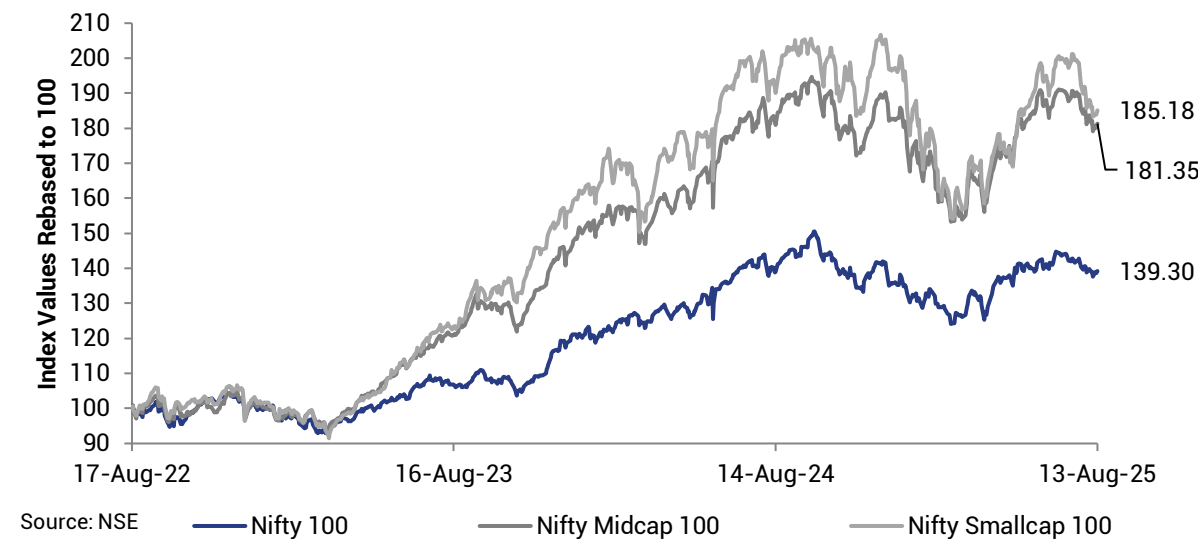
- Oil and Natural Gas Corporation (ONGC) has reported a 10% decline in net profit for the Jun quarter of 2025, due to lower oil prices and stagnant production from its aging fields. The company posted a net profit of Rs. 8,024 crore in the first quarter of the 2025–26 fiscal year, compared to Rs. 8,938 crore in the same period last year.
- Shriram Properties Limited announced strong Q1FY26 results. Net profit rose 18% to Rs. 20.6 crore, while total revenue increased by 24% to Rs. 261.5 crore. Revenue from operations surged 57%, driven by successful project handovers. The company is actively expanding its project pipeline and evaluating multiple new projects.
- Apollo Hospitals Enterprise reported a consolidated net profit of Rs. 433 crore in Q1FY26, marking a 42% increase compared to Rs. 305 crore in the same period last year. The profit after tax (PAT) was attributable to the owners of the company.

### GLOBAL EQUITY MARKET

- The U.S. equity markets closed higher after early gains faded, as optimism around a potential rate cut persisted despite cautious trading and limited economic data releases.
- European equities rose on hopes of a rate cut and easing tensions, though gains were capped as investors awaited fresh economic and trade updates.
- Asian equity markets mostly rose as an in-line U.S. inflation reading bolstered speculation that the U.S. Federal Reserve may cut interest rates by 25 basis points in Sep 2025, bringing forward its easing forecast amid concerns over a weakening labor market. Today (as of Aug 14), Asian equity markets opened mixed note as investors priced in a potential U.S. rate cut and awaited key employment data from Australia due later in the day.

### INDIAN DERIVATIVES MARKET

- Nifty Aug 2025 Futures stood at 24,712.20, a premium of 92.85 points above the spot closing of 24,619.35. The turnover on NSE’s Futures and Options segment fell to Rs.5,835.66 crore on August 13, 2025, compared with Rs. 3,60,404.15 crore on August 12, 2025.
- The NSE Put-Call ratio stood at 0.86 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	24,619	0.54	-2.11	1.99	4.12	26,277	21,744	21.68	21.99
Nifty 100	25,223	0.55	-2.09	0.27	2.97	27,336	22,177	21.58	22.56
Nifty 500	22,698	0.57	-2.51	-0.03	1.44	24,573	19,520	23.87	23.92
Nifty Midcap 100	56,682	0.63	-3.34	-0.35	-0.91	60,926	46,866	30.96	30.55
Nifty Smallcap 250	16,728	0.64	-5.20	-2.62	-5.77	18,688	13,315	31.90	26.02
Nifty SME Emerge	14,919	0.06	-0.61	-0.44	-10.16	17,224	11,930	25.83	44.36

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	24,123	1.12	2.68	-3.82	5.64	27,696	19,317	24.66	28.39
Nifty Bank	55,181	0.25	-2.77	10.74	8.50	57,628	47,703	15.03	15.66
Nifty FMCG	55,010	-0.04	-1.61	-10.55	-3.15	66,439	50,199	41.16	43.80
Nifty IT	34,693	0.05	-7.96	-11.30	-19.95	46,089	30,919	25.05	28.54
Nifty Media	1,662	0.88	-2.48	-18.49	-8.57	2,182	1,344	135.77	605.10
Nifty Metal	9,346	1.26	-0.39	4.34	8.05	10,322	7,690	18.30	21.46
Nifty Pharma	22,130	1.73	-0.43	-0.28	-5.48	23,908	19,121	31.85	33.91
Nifty Realty	886	0.24	-7.98	-13.82	-15.80	1,140	766	42.86	50.20
Nifty Energy	34,739	-0.01	-3.76	-18.40	-1.28	44,721	29,313	15.46	13.79

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	26,238	0.39	-2.29	16.12	11.59	27,370	22,358	17.19	17.66
Nifty India Consumption	11,845	0.83	1.92	1.95	4.24	13,058	10,091	40.51	43.07
Nifty Infrastructure	9,026	0.60	-2.49	-0.30	6.65	9,704	7,590	22.11	21.63
Nifty MNC	28,410	0.53	-1.83	-5.90	1.71	32,841	23,981	33.48	43.24
Nifty Public Sector Enterprise	9,651	0.73	-3.93	-12.99	1.25	11,565	7,956	12.12	10.42

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	23,849	0.04	4.69	25.48	13.50	23,969	16,542	35.22	29.43
Nasdaq Composite	21,713	0.14	5.48	26.33	12.44	21,804	14,784	32.94	21.28
FTSE 100	9,165	0.19	2.51	11.29	12.14	9,191	7,545	17.78	12.17
CAC 40	7,805	0.66	-0.31	7.27	5.75	8,258	6,764	17.87	13.62
DAX	24,186	0.67	-0.29	35.78	21.48	24,639	17,827	18.69	23.72
Nikkei	43,275	1.30	9.36	19.44	8.47	43,451	30,793	19.84	18.32
Hang Seng	25,614	2.58	6.11	49.14	27.69	25,736	16,926	11.83	10.00
SSE Composite Index	3,683	0.48	4.94	28.44	9.90	3,689	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	24,712.20	24,554.90	0.64
Near Basis	92.85	67.50	37.56
Mid Futures	24,849.00	24,691.90	0.64
Mid Basis	229.65	204.50	12.30
Near Open Interest (Cr.)	1.68	1.70	-1.02
Mid Open Interest (Cr.)	0.12	0.11	11.03
Rollover (%)	7.95	7.20	10.41

Source: NSE

Transaction Trends (Equity)		Amount in ₹ Cr.			
Nature	Gross Purchase	Gross Sale	Net	MTD	YTD
Foreign Institutional Investors*	9,976	12,625	-2,649	-18,710	-114,351
Mutual Funds**	11,909	6,437	5,472	33,223	311,310

\*As on 13th August 2025;\*\*As on 11th August 2025; Source: SEBI, NSDL

<sup>[1]</sup>Data as on 12 Aug, 2025

INDIAN ECONOMY

- The central government is aggressively pursuing the complete digitisation of land records across India by Dec 2025, excluding the northeastern states and Ladakh, to pave the way for future land reforms.
- The All India Sugar Trade Association (AISTA) has urged the government to reform sugar export quota rules. AISTA recommends that quotas be allocated only to mills that export directly, as the current system allows some mills to sell their quotas, which hampers overall exports.
- Chief Economic Advisor anticipates that U.S. tariff-related challenges will ease within two quarters. He urged greater private sector engagement to address long-term strategic issues such as artificial intelligence and reliance on critical minerals. Nageswaran attributed the growth slowdown in FY25 to tight credit conditions and highlighted agriculture's potential to boost GDP. He also emphasized the importance of diversifying import sources and adopting AI cautiously to mitigate labor displacement risks.

INDIAN DEBT MARKET

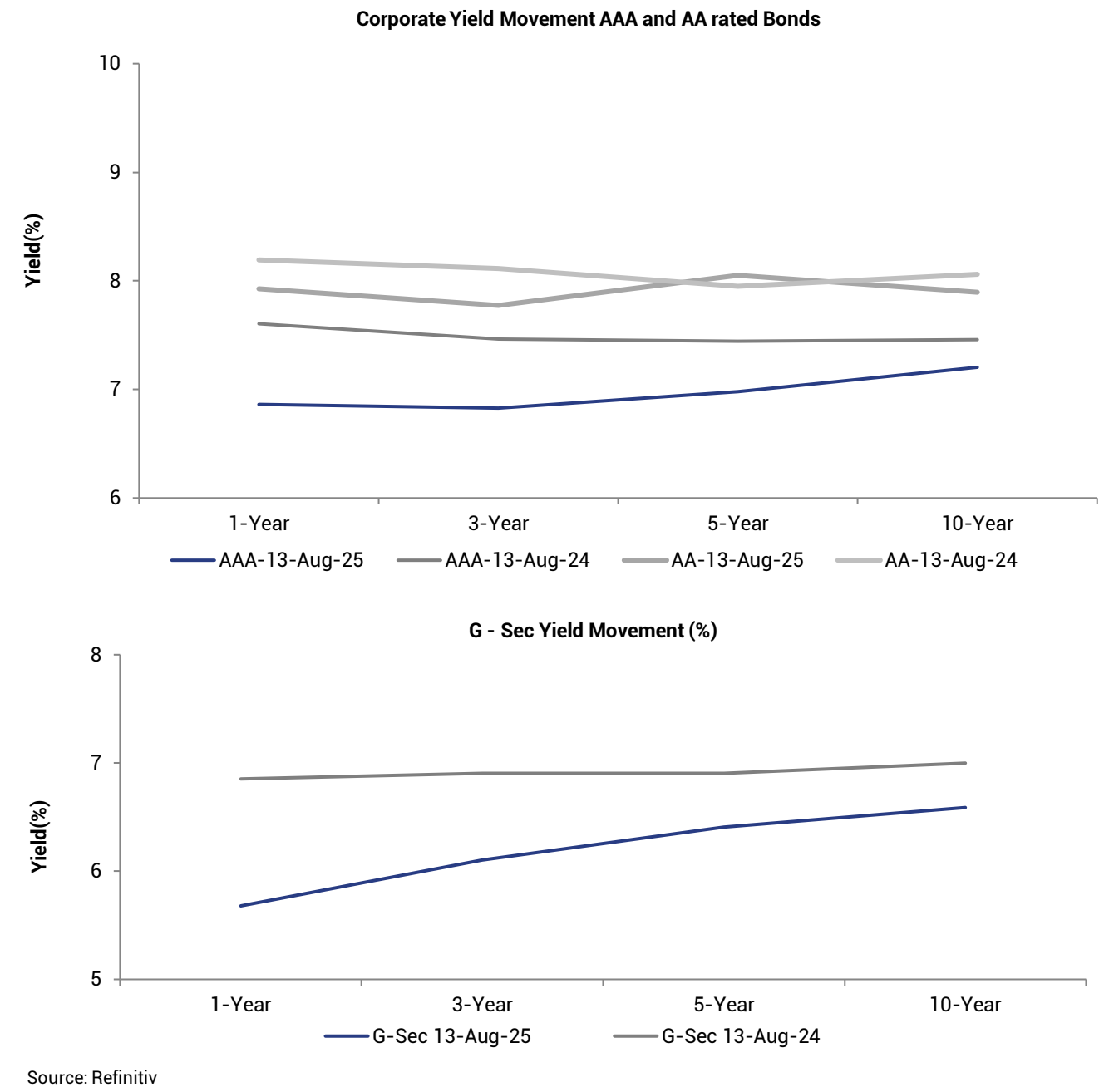
- Bond yields remained steady as a breach of a key technical level prompted state-run banks to increase buying, while more investors moved to cover short positions.
- Yield on the 10-year benchmark paper (6.33% GS 2035) was unchanged to close at 6.48% as compared to the previous day's close.

MONEY MARKET

- Reserve Bank of India conducted the auction of 91 days, 182 days and 364 days Treasury Bills for an aggregate amount of Rs. 21,000 crore for which the full amount was accepted, and the cut-off rate stood at Rs. 98.6497 (YTM: 5.4902%), Rs. 97.2987 (YTM: 5.5678%) and Rs. 94.7199 (YTM: 5.5898%), respectively.

SPREAD ANALYSIS

- Yields on gilts rose by 1 to 4 bps across maturities, except for the 1, 12, 13, 15, and 19 year papers, which declined by 1 to 3 bps. Meanwhile, yields on the 6, 10, and 14 year papers remained steady.
- Corporate bond yields fell by 4 to 8 bps across the curve, except for the 1, 2, 9, and 10 year papers, which rose by 1 to 8 bps while 8 year paper remained steady.



Key Indicators	Current	Previous
GDP (Q4 FY'25)	7.40%	6.40%
IIP (Jun'25)	1.50%	1.90%
Manufacturing PMI Jul'25	59.10	58.40
Credit Growth (Jul 25,2025)	10.00%	9.80%
Deposit Growth (Jul 25,2025)	10.20%	10.10%
WPI (Jun'25)	-0.13%	0.39%
CPI (Jul'25)	1.55%	2.10%
Current Account Deficit (Q4 of FY25, in \$ Billion)	-13.50	11.30
Fiscal Deficit (Apr to Jun 2025, as a % of Budget Estimates)	16.66	0.78
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 (%)	13-Aug-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 (%)	13-Aug-25	Week Ago	Month Ago	Year Ago
FBIL MIBOR	5.52	5.37	5.51	6.55
CALL	5.46	5.33	5.45	6.48
T-Repo	5.36	5.20	5.30	6.34
OIS- 3 M	5.46	5.45	5.47	6.58
OIS- 6 M	5.46	5.46	5.50	6.58

Source: FBIL

Certificate of Deposit (%)	13-Aug-25	Week Ago	Month Ago	Year Ago
3-Month	5.86	5.75	5.81	7.33
6-Month	6.12	6.04	5.96	7.50
9-Month	6.33	6.26	6.07	7.55
12-Month	6.40	6.31	6.24	7.62

Source: Refinitiv

Commercial Paper (%)	13-Aug-25	Week Ago	Month Ago	Year Ago
3-Month	5.90	5.82	5.82	7.21
6-Month	6.09	6.05	6.10	7.53
12-Month	6.33	6.34	6.30	7.67

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	5.62	5.60	6.74	-2	1	-114
3 Yr GOI Bond	6.02	6.00	5.82	6.79	1	20	-78
5 Yr GOI Bond	6.31	6.30	6.08	6.79	1	23	-48
10 Yr GOI Bond	6.48	6.48	6.30	6.88	0	18	-40
15 Yr GOI Bond	6.86	6.87	6.63	6.95	-1	23	-9
US 10 Yr Treasury	4.24	4.29	4.42	3.85	-5	-18	39

Source: Refinitiv

Corporate Bond Spread Matrix	AAA			AA		
	13-Aug-25	1 Month Avg.	1 Year Avg.	13-Aug-25	1 Month Avg.	1 Year Avg.
1 Yr	118	112	95	225	216	157
3 Yr	72	80	78	167	170	144
5 Yr	58	72	70	164	168	128
10 Yr	62	64	53	131	131	108

Source: Refinitiv

Liquidity Indicators (in ₹ Cr.)	13-Aug-25	Week Ago	Month Ago	Year Ago
Govt Securities	69,128	70,448	73,148	47,322
Call Money	13,280	16,512	15,690	11,382
T-Repo	413,411	389,060	401,113	355,163
LAF	NA	NA	NA	NA
Treasury Bills	13,078	11,059	3,370	3,889
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*	219	890	-671	2,710	3,435
Mutual Funds**	7,948	12,326	-4,378	-40,529	-381,461

\*As on 13th August 2025;\*\*As on 11th August 2025; Source: SEBI, NSDL

Govt. Borrowing Program	Scheduled	Completed	% Completed
	(Amt in ₹ Cr.)		
Week: August 11-15,2025	28,000	0	N.A
Month: Aug 2025	121,000	25,000	20.66%
H1: Apr 25-Sep 25	800,000	578,000	72.25%

Source: RBI

<sup>[1]</sup>Data as on 12 Aug, 2025



GLOBAL ECONOMY

- The U.S. Consumer Price Index (CPI) rose by 0.2% in Jul 2025, following a 0.3% increase in June, according to the Labor Department. The annual rate of consumer price growth remained unchanged at 2.7% in Jul. Core consumer prices, which exclude food and energy, increased by 0.3% in Jul after a 0.2% rise in Jun.

INTERNATIONAL MARKET UPDATE

- Germany’s wholesale selling prices rose by 0.5% YoY in Jul 2025, slowing from a 0.9% increase in Jun, according to Destatis.

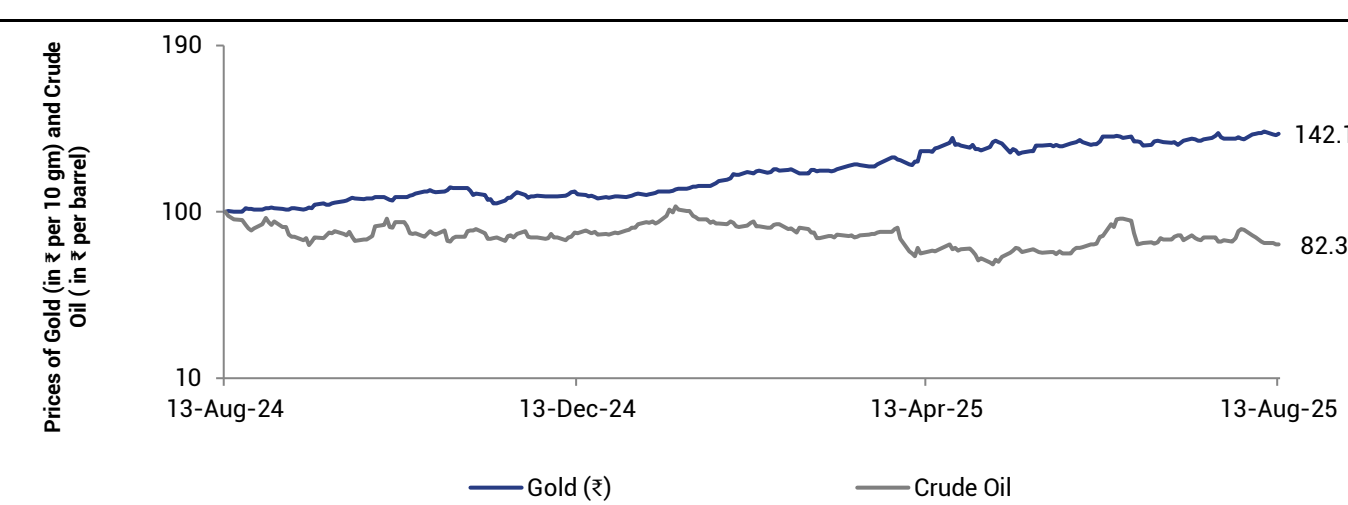
COMMODITY MARKET

- Gold prices rose as the U.S. dollar weakened amid expectations of a U.S. interest rate cut.
- Brent crude oil prices declined following a surprise rise in U.S. crude supply, though losses were limited by potential sanction leverage in upcoming geopolitical talks.

CURRENCY UPDATE

- The Indian rupee strengthened against the U.S. dollar as softer inflation data boosted expectations of a rate cut by the U.S. Federal Reserve.
- The euro strengthened against the U.S. dollar as investors focused on the possibility of a Federal Reserve rate cut.

CRUDE OIL VS. GOLD (IN ₹)



<sup>[1]</sup>Data as on 12 Aug, 2025

COMMODITY MARKET UPDATE

International Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (\$/oz)	3,354	0.28	-0.03	36.08	27.85	3,432	2,448
Silver (\$/oz)	38	1.60	0.34	38.28	33.32	39	28
NYMEX Crude(\$/bbl)	64	-0.84	-8.56	-20.19	-12.11	81	58
Brent Crude(\$/bbl)	67	-1.32	-8.44	-19.57	-12.01	84	62
Baltic Dry Index	2,025	0.40	21.77	21.26	103.11	2,258	715
Core Commodity Index	364	-0.17	-2.49	11.54	2.03	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	50.90	50.60	50.40	50.20	50.20
Germany	50.60	50.40	50.10	50.50	49.10
France	48.60	49.20	47.80	47.60	49.10
U.K.	51.50	52.00	48.50	50.60	52.80
Japan	51.60	51.50	51.20	51.10	52.50
China	50.80	51.30	51.10	51.10	51.20

Source: Refinitiv

Indian Commodities	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
Gold (10 gm)	99,722	0.35	2.71	42.14	31.36	100,672	67,984
Silver (1 kg)	115,115	1.70	4.41	42.98	34.09	115,808	78,617
Crude Oil (1 bbl)	5,538	-0.18	-2.79	-17.63	-8.72	7,249	1,277
Natural Gas (1 mmbtu)	246	-6.17	-13.80	33.95	-26.81	392	138
Aluminium (1 kg)	255	0.26	2.00	18.65	5.26	267	209
Copper (1 kg)	896	0.73	1.39	14.13	12.27	934	772
Nickel (1 kg)	1,354	0.32	2.34	-0.76	1.15	1,783	1,276
Lead (1 kg)	187	-0.45	2.32	-1.24	-0.27	201	179
Zinc (1 kg)	275	0.83	5.17	5.67	-3.38	301	241
Mentha Oil (1 kg)	1,021	-2.38	9.66	2.68	2.73	1,046	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	87.44	-0.31	1.91	4.13	2.13	87.95	83.44
EUR/INR	102.33	0.09	2.03	10.95	15.53	102.68	87.29
GBP/INR	118.69	0.41	2.47	10.01	10.88	118.80	104.67
YEN(100)/INR	59.32	0.13	1.93	3.81	9.00	60.83	53.87
SGD/INR	68.26	0.06	1.90	7.23	8.98	68.48	62.21

Source: Refinitiv

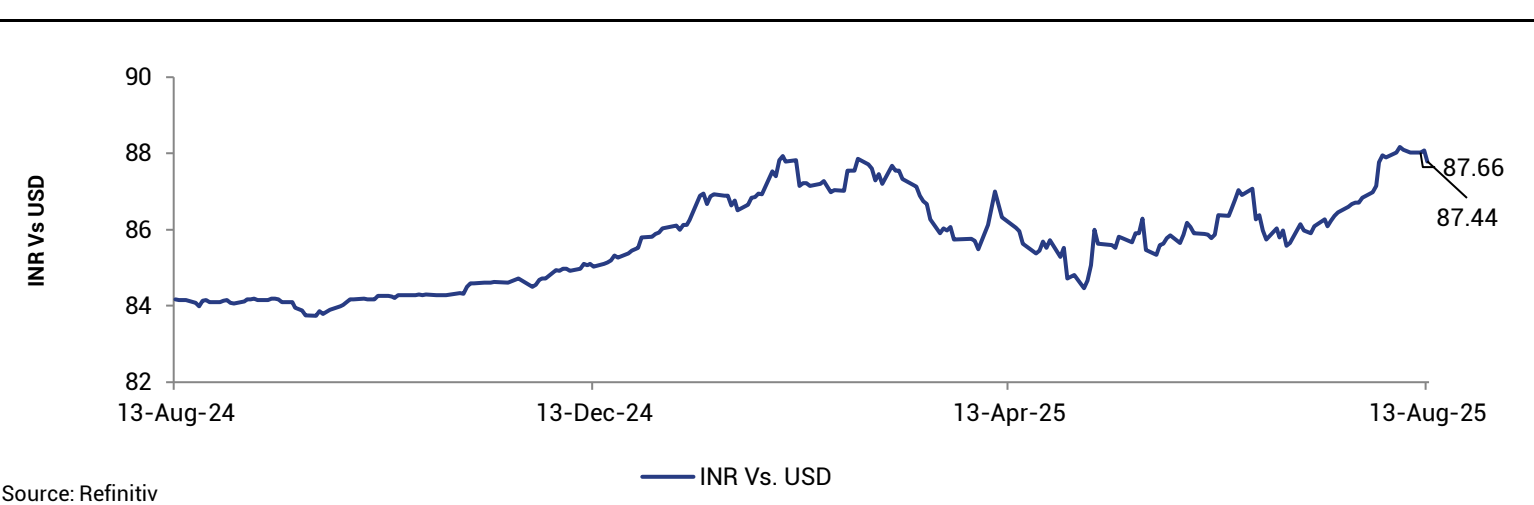
Currency	Px Last	Change in %				52 Week	
		1 Day	1 Month	1 Year	YTD	High	Low
EUR/USD	1.17	0.27	0.13	6.48	13.05	1.18	1.01
GBP/USD	1.36	0.59	0.56	5.58	8.50	1.38	1.21
USD/JPY	147.38	-0.30	-0.01	0.38	-6.23	158.87	139.56
SGD/USD	0.78	0.25	-0.01	2.89	6.66	0.78	0.73
Dollar Index	97.84	-0.26	-0.01	-4.60	-9.81	110.18	96.38

Source: Refinitiv

Currency Futures (Rupee)	Closing	1 Day Change %	YTD	1 Month Change %	3 Month Change %
Future 1 Month	87.51	-0.32	1.90	1.95	2.52
Future 3 Month <sup>[1]</sup>	88.20	0.23	2.58	2.38	2.74
Future 6 Month	88.49	-0.31	2.65	1.61	2.73
NDF 1 Month	87.57	-0.18	1.98	1.92	2.64
NDF 3 Month	87.85	-0.17	1.75	1.97	2.54
NDF 6 Month	88.31	-0.17	1.67	2.00	2.52

Source: Refinitiv

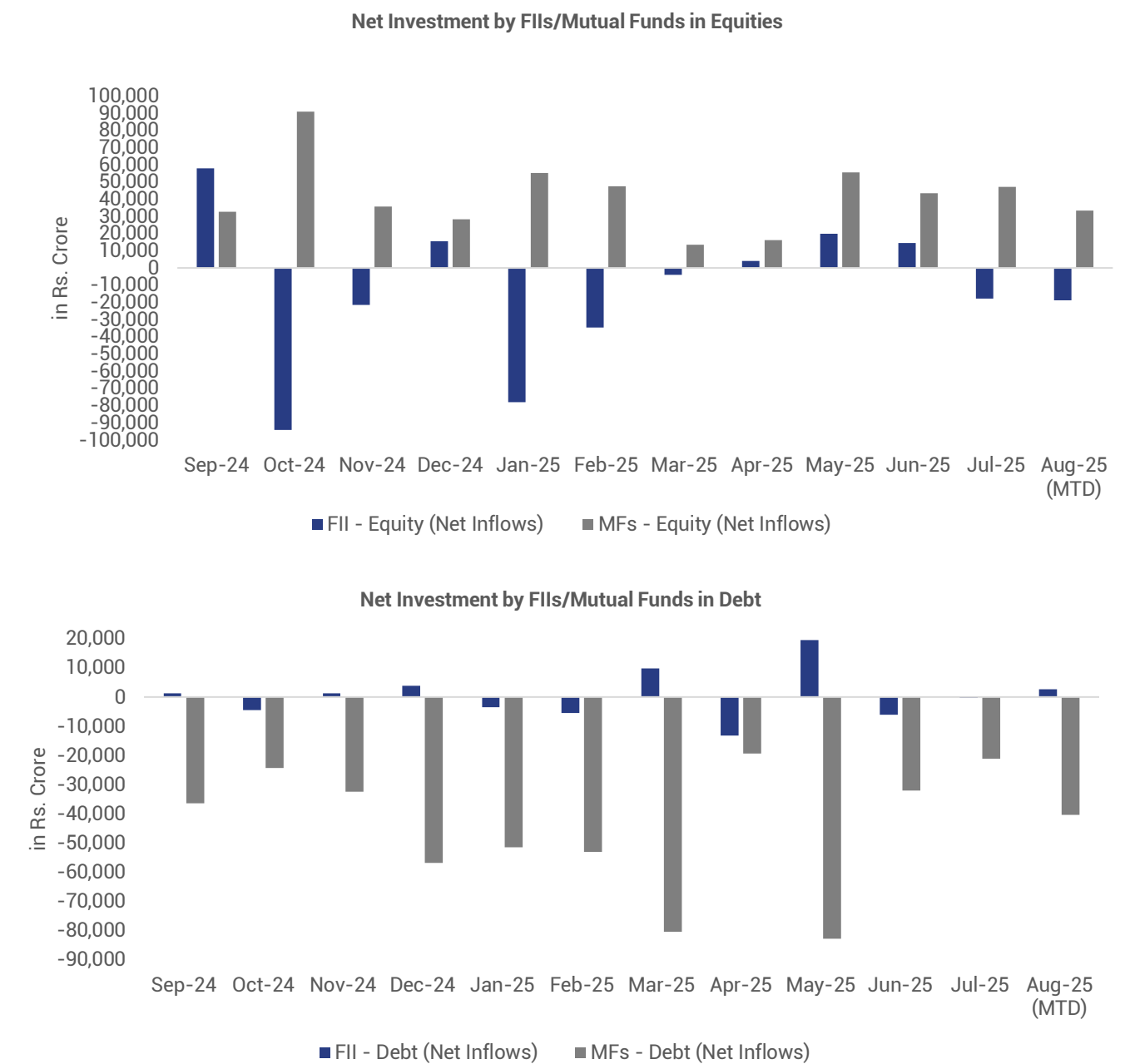
RUPEE VS. U.S. DOLLAR



MUTUAL FUND AND INSURANCE UPDATE

- Mutual funds bought equity worth Rs. 11,908.85 crore as against sale of Rs. 6,437.01 crore as on Aug 11, 2025. This led to a net purchase of Rs. 5,471.84 crore compared with a net purchase of Rs. 6,089.82 crore on Aug 8, 2025.
- Mutual funds bought debt worth Rs. 7,948.23 crore as against sale of Rs. 12,326.09 crore as on Aug 11, 2025. This led to a net sale of Rs. 4,377.86 crore compared with a net sale of Rs. 7,524.72 crore on Aug 8, 2025.

TRANSACTION TRENDS FIIs vs MFs



EVENTS CALENDAR

Event	Date
WPI Inflation (Jul 2025)	14-Aug-25
Forex Reserves	15-Aug-25
Loans and Advances to Central Government	15-Aug-25
Loans and Advances to State Government	15-Aug-25
Reserve Money	20-Aug-25
Money Supply	20-Aug-25

<sup>[1]</sup>Data as on 12 Aug, 2025

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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	0.39	-1.71	7.74	1.37	13.97	17.93
Mid Cap Fund	0.23	-1.68	12.24	1.09	20.61	25.83
Large & Mid Cap Fund	0.24	-2.02	9.96	1.36	17.68	22.24
Small Cap Fund	-0.40	-3.46	10.61	-1.12	20.56	29.28
Multi Cap Fund	0.24	-2.12	9.90	1.30	18.91	23.74
Focused Fund	0.29	-1.79	8.25	1.19	15.35	19.13
Value Fund	0.17	-2.78	7.33	-1.53	19.03	23.17
Contra Fund	0.32	-2.07	8.42	0.38	20.17	24.84
ELSS	0.13	-2.30	8.88	0.72	16.55	21.95
Sectoral	0.71	-1.68	10.20	3.63	19.28	22.75
Thematic	0.37	-1.44	8.26	-0.79	17.76	21.56
Dividend Yield Fund	0.31	-2.53	6.86	-3.18	18.48	22.70

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	5.28	5.24	5.69	6.15	6.35	5.13
Liquid Fund	5.46	5.40	6.59	6.92	6.90	5.51
Ultra Short Duration Fund	3.95	5.07	7.31	7.16	6.77	5.52
Low Duration Fund	2.20	4.71	8.25	7.75	7.10	5.78
Money Market Fund	3.98	5.23	8.08	7.71	7.17	5.78
Short Duration Fund	-6.36	1.75	8.90	8.25	7.29	5.97
Medium Duration Fund	-10.12	-0.14	8.97	8.62	7.41	6.77
Medium to Long Duration Fund	-25.07	-7.57	6.57	6.61	6.89	5.24
Long Duration Fund	-55.62	-18.27	3.22	4.84	8.09	5.07
Corporate Bond Fund	-8.82	0.96	9.20	8.46	7.39	5.95
Gilt Fund	-43.05	-15.99	4.37	5.43	6.80	5.08
Gilt Fund with 10 year constant duration	-24.85	-8.98	8.19	8.20	8.01	5.38
Dynamic Bond	-25.54	-7.88	6.54	6.66	7.01	5.58
Banking and PSU Fund	-9.16	0.92	8.75	8.12	7.20	5.82
Floater Fund	-4.89	2.09	8.79	8.25	7.68	6.25
Credit Risk Fund	-4.24	2.87	12.90	10.64	8.44	9.24

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	0.00	0.38	3.03	6.40	6.73	5.43
Balanced Advantage	0.13	-1.16	6.01	2.64	11.34	12.14
Aggressive Hybrid Fund	0.01	-1.41	7.64	2.82	14.04	17.28
Equity Savings	0.07	-0.19	4.97	5.37	9.62	10.44
Conservative Hybrid Fund	-0.17	-0.63	4.52	5.76	8.81	9.18
Multi Asset Allocation	0.06	-0.66	7.95	7.18	15.90	17.38

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

Source: MFI 360 Explorer

Event	Date
Credit Growth	22-Aug-25
Deposit Growth	22-Aug-25
Index of Industrial Production (Jul 2025)	28-Aug-25
GDP (Q1FY26)	29-Aug-25
Infrastructure Output	29-Aug-25
Fiscal deficit (as a % of budget estimates)	29-Aug-25