

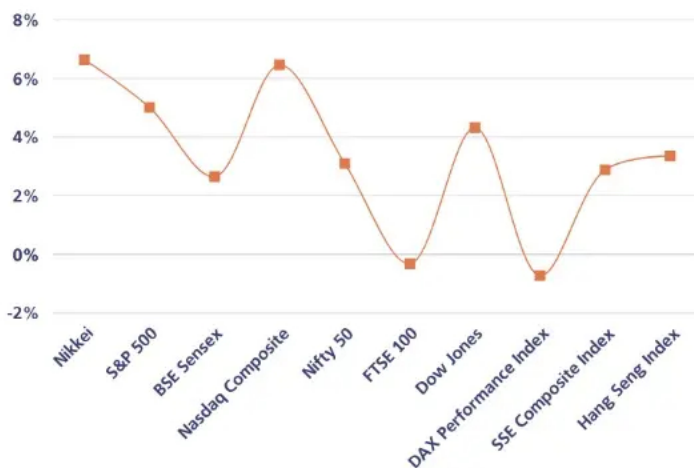
MONEY MOVES MONTHLY



July IPO pipeline crosses \$2.4bn — investor appetite rebounds strongly



- **FII and DII** - FII Bought: 7,488Cr, DII Bought 72,673Cr
- **Auto Sector Drag**- Maruti, Tata & Hyundai all report double-digit sales declines; Mahindra bucks trend with 18% SUV growth
- **Renewable Surge**- Renewable power output jumps 24% H1-2025 – highest growth in three years
- **GST Gathering**- June GST mop-up hits ₹1.85 trn, a healthy 6% y/y rise
- **Nifty Expiry Day Shift**- Nifty weekly options expiry moved to Tuesday — change effective from June series
- **Unemployment Edges Up**- India's jobless rate rises to 5.6% in May, up from 5.1% in April — first uptick in 3 months



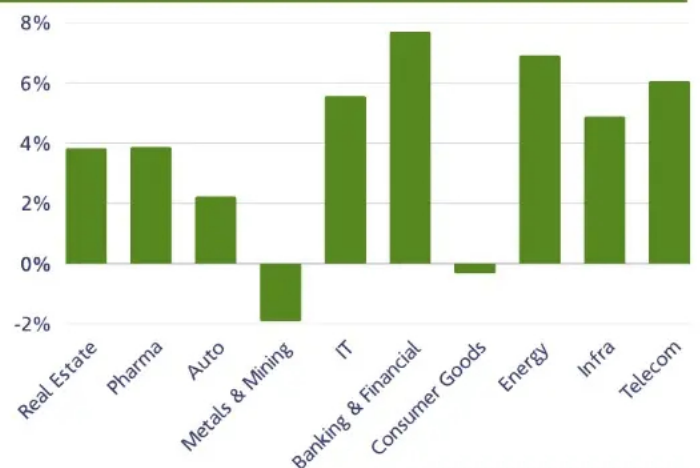
WORLD MARKET INDICES

		June
Nikkei	40487	▲ 6.64%
Nasdaq	20369	▲ 6.46%
S&P 500	6204	▲ 5.01%
Dow Jones	44094	▲ 4.32%
Hang Seng Index	24072	▲ 3.36%

SECTOR PERFORMANCE

Banking & Financial: 7.71%
Energy: 6.92%

Consumer Goods: -0.33%
Metal & Mining: -1.92%



MACROECONOMIC INDICATORS

GDP 6.5%

Inflation(CPI) 2.8%



\$ - ₹ = 85.71

▼ Rupee depreciated by 0.22%