

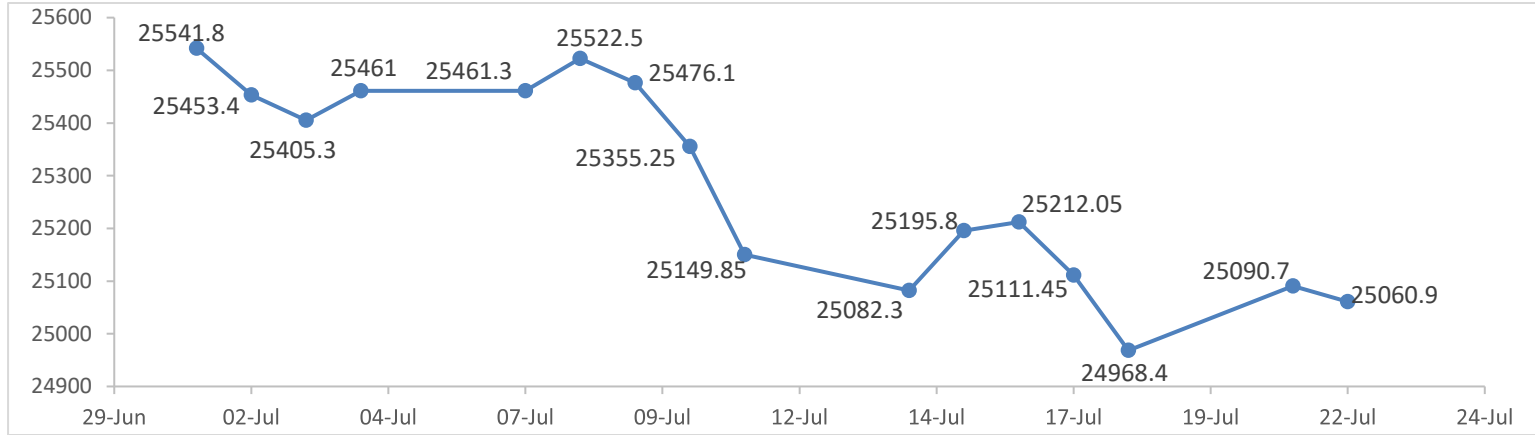
Nifty 50

24,750.70 **416.50**
(1.71%)

52 Week High: 26,277.4

52 Week Low: 21,281.4

Resistance		Support	
R1	25,051.8	S1	24,149.9
R2	25,330.4	S2	23,871.3
R3	25,781.4	S3	23,420.4



Sectorial Indices	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
Nifty Auto	22,308	20,499	-10.4%
Nifty PSU Bank	6,542	5,652	-10.5%
Nifty Pharma	21,772	19,814	-7.6%
Nifty IT	35,795	37,318	12.5%
Nifty FMCG	56,445	50,689	-10.6%
Nifty Metal	8,582	8,219	-2.1%
Nifty Fin Serv	26,114	23,029	-0.8%
Nifty Cons	37,098	34,459	-8.3%

Global Indices	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
Dow Jones	40,579	42,237	2.31%
Nasdaq	17,464	19,114	6.32%
FTSE	8,476	8,772	2.06%
Hang Seng	22,119	23,289	2.90%
USD/INR	84	85.51	0.83%
GBP/INR	113	115.19	0.46%

Net Flow	Amount (Rs Cr)	Index	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
FII	11,773.2	SENSEX	80,242	81,451	1.08%
DII	67,642.3	NIFTY 50	24,334	24,750	1.71%
MF Equity	48,887.1	BANK NIFTY	55,087	55,749	1.54%
MF Debt	-80,121.65				

Top Gainers	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
IFCI	42.27	67.42	60.7%
GRSE	1917	3003.2	57.2%
RPOWER	39.9	58.10	53.4%
ZENTEC	1416.4	2139.8	52.8%
INTELLECT	789.5	1172.2	50.4%

Top Losers	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
ABFRL	263	85.8	-65.8%
RAYMOND	1527.3	629.9	-59.9%
CHAMBLFERT	692.6	551	-20%
JINDALSAW	248	211.9	-13%
DOMS	2746	2447.8	-11.7%

Commodities	Prev. Close (30-Apr '25)	Close (30-May '25)	% Change (1M)
Gold	93,966	95,875	1.96%
Silver	94,937	97,015	1.58%
Crude (WTI)	58.21	60.79	4.56%

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Disclaimer: Investments are subject to market risk, this is for knowledge purpose only.

India–UK Sign Historic Free Trade Pact to Boost Bilateral Growth:

India and the UK signed a landmark Free Trade Agreement in May 2025, aimed at enhancing bilateral trade, job creation, and strategic cooperation. The deal slashes tariffs on key goods—textiles, autos, whisky, and pharma - while expanding market access for Indian IT and UK financial services. It includes provisions on digital trade, intellectual property, and professional mobility, making it the UK's most comprehensive post-Brexit trade pact. The FTA is projected to add over £20 billion to annual trade and deepen ties between two major global economies.

SBI Board approves \$3 Billion fundraising in FY26 to fuel growth:

In a major move to bolster its capital base, State Bank of India the country's largest public sector bank has approved plans to raise up to **\$3 billion** in long-term funds during FY26. The capital will be raised via public or private placement of senior unsecured notes in major foreign currencies under Reg S and/or Rule 144A of the U.S. Securities Act. SBI is witnessing strong credit demand across infrastructure, manufacturing, and retail. The fundraise supports its proactive strategy to ensure liquidity, manage rate risks, and sustain lending strength in a dynamic economic environment.

Nifty's Valuation Premium Shrinks as Yield Spread Turns Negative:

The earnings yield on Nifty 50 index has fallen by 64 basis points, while the 10-year U.S. Treasury yield has risen by 27 basis points over the same period. This shift has caused the yield spread - the difference between India's equity earnings yield and the U.S. risk-free rate to slip from a 21-month high of 64 basis points at the end of February to -18 basis points in late May, marking its lowest level since April 2024. Historically, Indian equity valuations have shown an inverse relationship with US bond yields.

GST Collections Cross ₹2 Lakh Crore for Second Month, Up 16.4% YoY:

India's Goods and Services Tax (GST) collections in May 2025 crossed the ₹2.01 lakh crore mark for the second consecutive month. This reflects a 16.4% year-on-year growth, signaling strong economic activity, better compliance, and sustained consumption momentum. The continued surge in GST collections presents a promising outlook for the fiscal year ahead. The government has projected an 11% increase in GST collections for FY26.

IPO Update :-

Company Name	IPO Date (May'25)	Market Response
Borona Weaves	20 May – 22 May	147.8x oversubscribed
Belrise Industries Limited	21 May – 23 May	43.14x oversubscribed
Prostarm Info Systems	27 May – 29 May	96.68x oversubscribed
Scoda Tubes	28 May – 30 May	57.37x oversubscribed

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Endovia Family Office

Our Mission is your Financial Well Being!

A Boutique Wealth Management and Family Office working towards your continual financial well-being in the present and the future

Comprehensive Engagement Platform where we act as your Family's Personal CFO, managing all aspects of your family's financial well-being ranging from Investment management, Cash flow with Goal setting, Performance reporting, Global Portfolios, Insurance Solutions, Real Estate Advisory, Custody solutions, Booking Keeping, Tax Solutions, Legal, Succession Planning, Philanthropy etc.

We Deliver Custom Investing Strategies

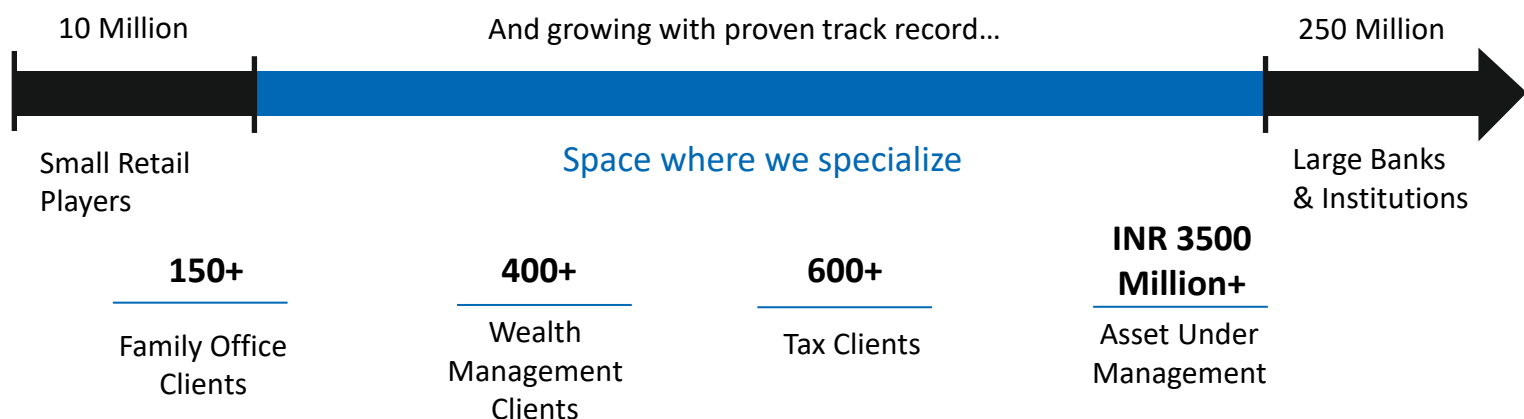
Optimize Risk And Return On Your Behalf

Endovia Family Office brings to you the benefits of synergic interaction with the best market forces creating a combined effect that is greater than the sum of its parts



With the Endovia and Motilal Oswal partnership clients get the best financial insights tailored specially for them with easy to use and transparent systems at your easy disposal

Small Outfits are unable to provide desired services and large players do not cater to this segment...



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