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Monthly Market Round-Up

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News at Glance

August 2025

Global News

- US FED chair signaled a possible interest rate cut in the September monetary policy meet amidst rising risks to US job market and ongoing inflation concern.
- FED rate cut expectations in September lead to US stock markets soaring record highs, US treasury yields falling and weakening of Dollar.
- Oil Prices fell during the month due to weaker demand in the US, possibility of a ceasefire deal in Ukraine and upcoming supply boost from OPEC and it's allies.
- US tariff of 25% on Indian Imports plus additional 25% for using Russian oil came into effect in August 2025.
- Credit ratings agency S&P Global upgraded India's long-term sovereign credit ratings to 'BBB' for the first time since 2007 citing economic resilience and fiscal consolidation.

Domestic News

- India’s Gross Domestic Product (GDP) growth for the first quarter of the current financial year 2025-26 stood at a robust 7.8% surpassing expectations.
- Reserve Bank of India kept repo rate unchanged at 5.55% in it's Monetary Policy meet held in August 2025. The policy stance continues to remain neutral.
- Inflation in India dropped to 1.55% in July from 2.1% in June, falling below RBI's tolerance band of 2%-6%.
- Prime Minister of India in his Independence day speech announced a "next generation' GST reform to be implemented by Diwali 2025 aiming to simplify tax slabs and reduce tax burden on common citizens.
- Indian Equity markets witnessed heightened volatility this month due to continued FII selling and the reciprocal US tariffs on India coming into effect.
- Offsetting heavy FPI outflows, the Domestic Institutional Investors pumped ₹94,829 crore of fresh money into Indian equities in August, the second-highest monthly inflow after record ₹1.07 trillion influx in October 2024.
- The Unified Payments Interface (UPI) crossed the 20 billion monthly transaction volume milestone in August, according to National Payments Corporation of India (NPCI), which runs UPI.

Source: www.moneycontrol.com, www.reuters.com,

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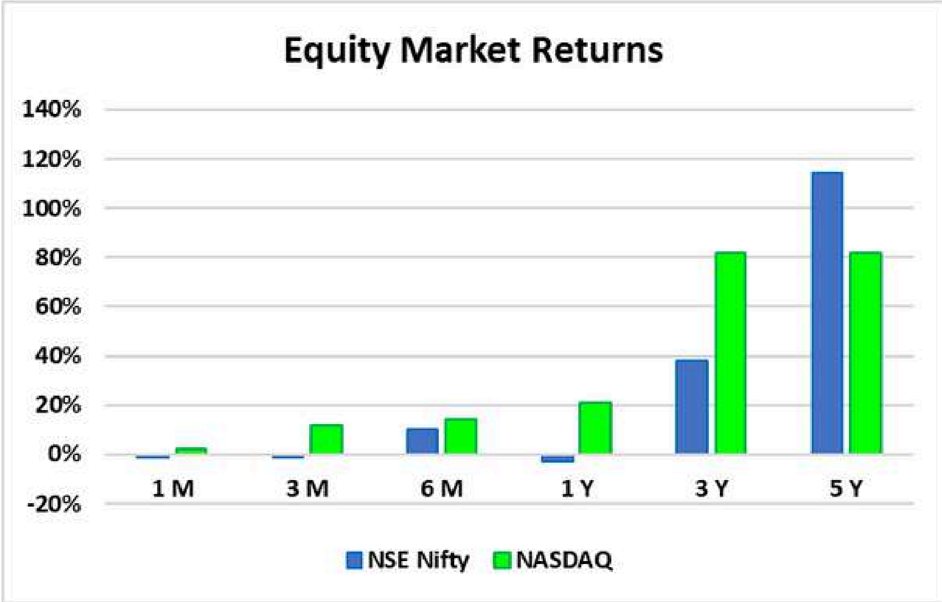
India & USA: Equity Markets

Period	Nifty 50	NASDAQ
1 month	-1%	2%
3 month	-1%	12%
6 month	10%	14%
1 Year	-3%	21%
3 Year	38%	82%
5 Year	114%	82%



Source: www1.nseindia.com, www.bseindia.com, Data as on 29-August-2025

Indian Equities

Performance of major indices over last month:

- **Nifty 50: -0.08%**
- **Nifty Midcap: -0.24%**
- **Nifty Small Cap: -1.35%**

Markets witnessed a short term respite due to positive domestic cues. However, overall volatility in equity markets continued amidst US tariff woes.

Source: www1.nseindia.com, www.bseindia.com, Data as on 29-August-2025

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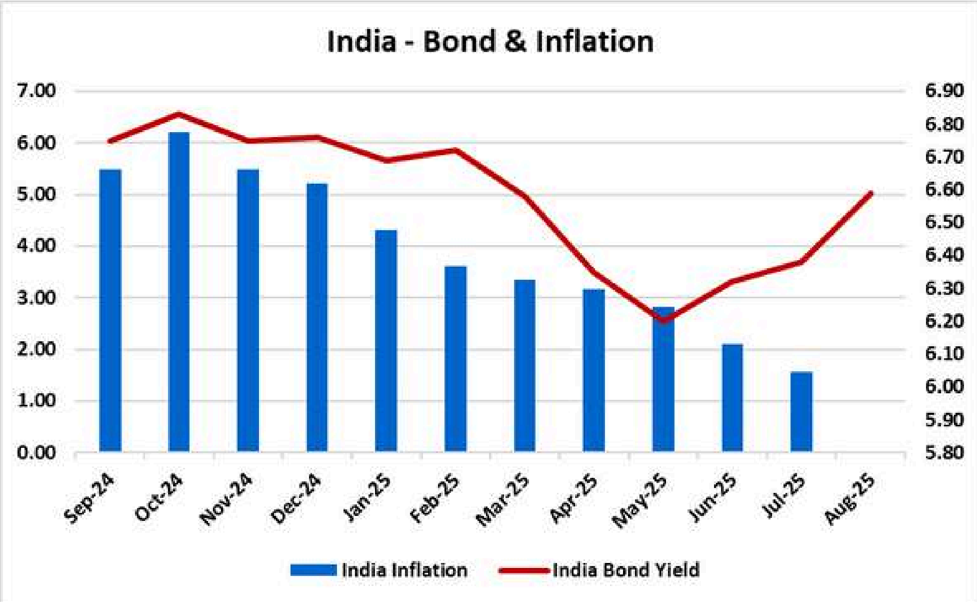
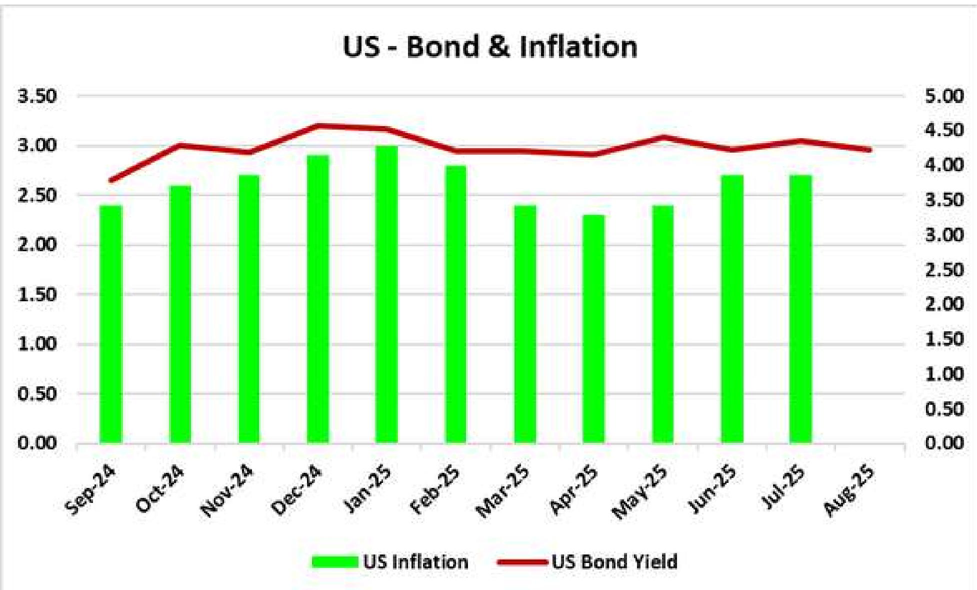
India & USA: Debt Markets & Inflation



• Indian G-Sec Yield rose from 6.38 in July to 6.59 in August amidst heightened US trade tensions and subsequent plunging of Rupee. Announcement of tax reforms by government to boost consumption and attract foreign inflows stoked fears of increased govt borrowings and fiscal concerns, pushing 10 Year G-Sec yields up further.

• Inflation dropped to a 8-year low of 1.55% in July 2025 raising hopes of further rate cuts by RBI.



- **US Treasury yields plunged and fell to 4.23 in August from 4.36 levels in July 2025 due to weak labor market and sticky inflation.**
- **September rate cut expectations by US-FED lead to a further drop in yields.**

Source: www.tradingeconomics.com, www.ccilindia.com, www.marketwatch.com

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Mutual Fund Scheme Performance

Category - Equity

Performance by Mutual Fund Category (%) as on 29 August, 2025

3 Months	6 Months	1 Year	3 Years	5 Years	10 Years
Mid Cap 0.85	Small Cap 18.26	Large Cap (3.76)	Mid Cap 19.64	Small Cap 28.28	Small Cap 16.89
Multi Cap 0.07	Mid Cap 17.93	Large & MidCap (3.93)	Small Cap 19.33	Mid Cap 25.34	Mid Cap 15.72
Flexi Cap 0.05	Multi Cap 15.51	Mid Cap (3.94)	Multi Cap 18.06	Multi Cap 23.18	Multi Cap 14.79
Small Cap (0.05)	Large & MidCap 14.91	Multi Cap (3.99)	Large & MidCap 17.03	Large & MidCap 21.87	Large & MidCap 14.41
Large & MidCap (0.24)	Flexi Cap 13.79	Flexi Cap (4.36)	ELSS 15.68	ELSS 20.12	Flexi Cap 13.70
Large Cap (0.47)	ELSS 13.34	ELSS (4.87)	Flexi Cap 15.16	Flexi Cap 19.82	ELSS 13.57
ELSS (0.74)	Large Cap 12.09	Small Cap (6.40)	Large Cap 13.50	Large Cap 17.74	Large Cap 12.18

Source: www.valueresearchpro.com

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Mutual Fund Scheme Performance

Category - Debt

Performance by Mutual Fund Category (%) as on 29 August, 2025

1 Month	3 Months	6 Months	1 Year	3 Years
Liquid 0.46	Money Market 1.59	Corporate Bond 4.43	Medium Duration 8.19	Medium Duration 7.29
Money Market 0.41	Ultra Short Duration 1.50	Short Duration 4.26	Corporate Bond 8.07	Corporate Bond 7.29
Medium Duration 0.40	Liquid 1.46	Medium Duration 4.24	Short Duration 7.96	Short Duration 7.22
Low Duration 0.34	Low Duration 1.46	Low Duration 4.04	Low Duration 7.65	Money Market 7.18
Short Duration (0.04)	Short Duration 0.73	Money Market 3.98	Money Market 7.63	Low Duration 7.08
Corporate Bond (0.15)	Corporate Bond 0.49	Ultra Short Duration 3.60	Ultra Short Duration 7.10	Liquid 6.90
Ultra Short Duration (0.23)	Medium Duration 0.49	Liquid 3.24	Liquid 6.86	Ultra Short Duration 6.79

Source: www.valueresearchpro.com