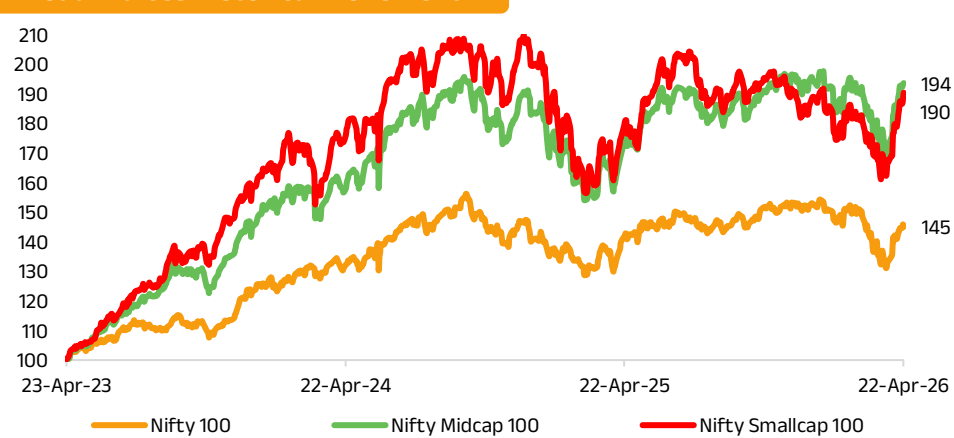


Broad Indices Historical Movement



Source: NSE

Broad Indices

	22-Apr-26	1 Day	1 Week	1 Month
Nifty 50	24,378.10	-0.81%	0.61%	5.47%
Nifty 100	25,329.95	-0.53%	1.22%	6.58%
Nifty 200	13,916.75	-0.39%	1.45%	7.17%
Nifty 500	22,991.50	-0.22%	1.75%	7.80%
Nifty Large Midcap 250	16,391.70	-0.15%	1.88%	8.15%
Nifty Midcap 150	22,191.05	0.22%	2.53%	9.71%
Nifty Next 50	71,346.20	0.74%	4.05%	11.72%
Nifty Smallcap 250	16,683.45	1.03%	3.94%	12.79%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Smart Beta Index

Index	22-Apr-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,926.70	-0.22%	1.28%	8.85%
NIFTY 500 Value 50	16,716.60	0.50%	2.20%	8.58%
Nifty 200 Quality 30	20,338.30	-0.75%	2.11%	7.96%
Nifty 50 Equal Weight	32,583.55	-0.44%	1.17%	6.91%
NIFTY Alpha Low Volatility 30	26,005.00	-0.37%	1.01%	4.56%
Nifty High Beta 50	4,108.15	1.40%	4.78%	16.66%
Nifty Low Volatility 50	24,508.75	-0.43%	1.33%	5.54%
Nifty Midcap150 Momentum 50	62,068.10	-0.05%	1.55%	9.17%
Nifty PSE	10,681.60	0.53%	2.91%	8.09%
Nifty SME Emerge	13,789.40	0.54%	2.78%	15.25%
Nifty 100 ESG	4,974.90	-0.68%	1.40%	7.81%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Sector Indices

Index	22-Apr-26	1 Day	1 Week	1 Month
Nifty Auto	26,450.25	-0.66%	-0.12%	7.02%
Nifty Bank	57,124.45	-0.43%	1.46%	6.92%
Nifty Consumption	11,557.45	-0.27%	2.56%	8.30%
Nifty Financial	26,625.25	-0.84%	0.68%	7.44%
Nifty FMCG	51,199.00	0.75%	6.02%	8.92%
Nifty Healthcare	14,484.90	-0.15%	0.42%	0.71%
Nifty IT	30,496.25	-3.89%	-3.31%	4.44%
Nifty Media	1,453.05	0.69%	4.56%	11.34%
Nifty Metal	12,892.20	0.45%	2.74%	12.96%
Nifty MNC	32,052.45	0.82%	4.85%	11.00%
Nifty Pharma	22,455.45	0.08%	0.09%	-0.38%
Nifty Realty	803.35	0.58%	3.45%	15.36%
Nifty Energy	39,896.70	1.42%	5.01%	11.11%

Source: NSE; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Nifty 50 Top 5 Gainers

Company	22-Apr-26	Prev_Day	% Change	1 Week
Tata Beverages	1,178.60	1,142.00	3.20	7.71
HUL	2,368.80	2,310.70	2.51	9.79
NTPC	405.40	396.20	2.32	3.26
Hindalco	1,039.90	1,021.65	1.79	2.81
Tata Motors	361.85	355.90	1.67	1.10

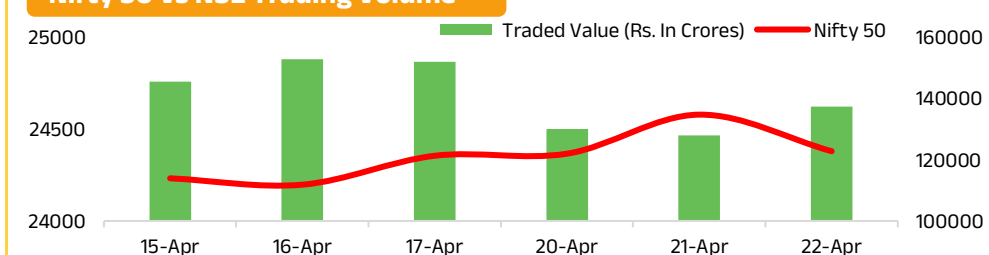
Source: NSE

Nifty 50 Top 5 Losers

Company	22-Apr-26	Prev_Day	% Change	1 Week
HCL Tech	1,285.30	1441	-10.82	-11.44
Infosys	1,268.60	1313	-3.40	-2.81
M&M	3,149.70	3247	-3.01	-3.28
TCS	2,538.50	2611	-2.76	-0.64
Tech Mahindra	1,462.60	1501	-2.55	-1.43

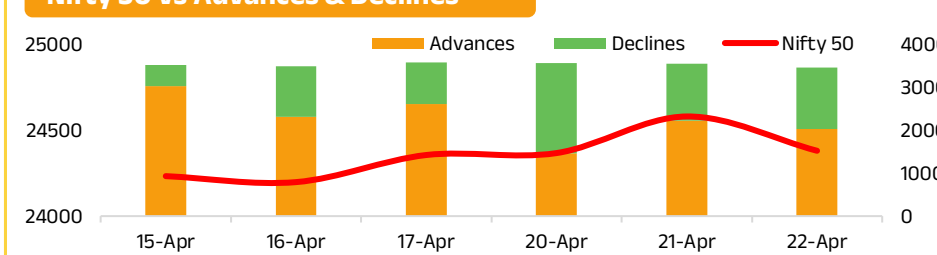
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

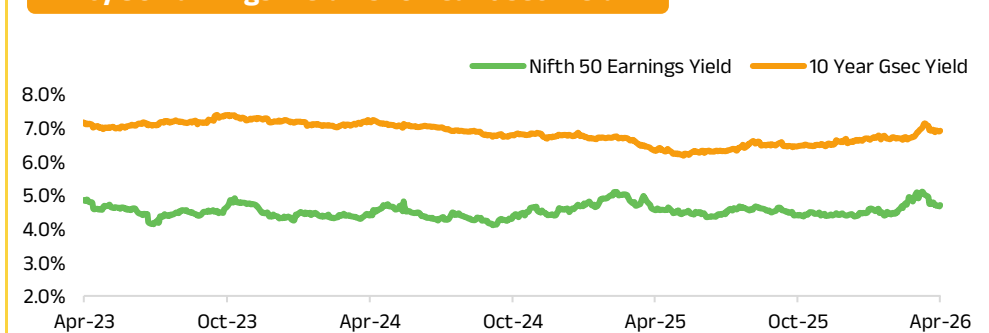
Indian equity markets snapped their three-day winning streak and closed sharply lower amid heightened global risk aversion, as stalled U.S.-Iran peace talks and ongoing shipping disruptions kept investors cautious despite an indefinite extension of the ceasefire by the U.S. President pending a "unified proposal" from Tehran.

Tech Mahindra reported a 16% YoY increase in consolidated net profit to Rs. 1,353.8 crore for the Jan-Mar quarter of FY26, compared with Rs. 1,166.7 crore in the same period last year. Revenue from operations grew 12.6% to Rs. 15,076.1 crore from Rs.13,384 crore a year earlier.

HCL Tech posted a net profit of Rs. 4,488 crore for Q4 FY26, up 4.2% YoY from Rs. 4,307 crore. On a sequential basis, profit rose 10.1%. Revenue grew 12.34% in reported terms to Rs. 33,981 crore.

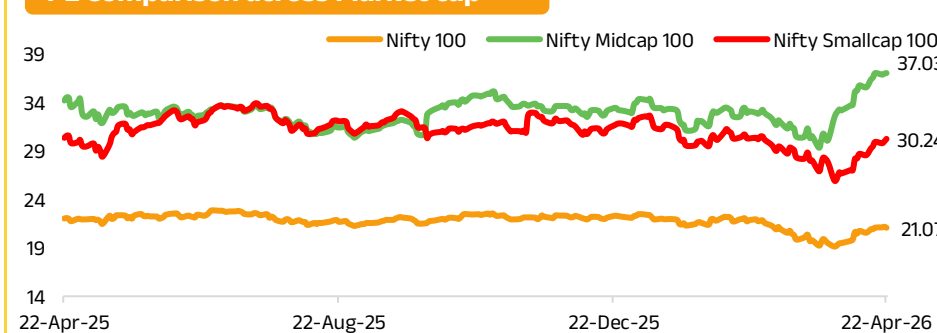
Indian Hotels Company (IHCL), backed by the Tata Group, along with its subsidiaries, has completed the acquisition of a 51% stake in Brij Hospitality for approximately Rs. 222 crore. Following the transaction, Brij Hospitality has become a subsidiary of IHCL.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



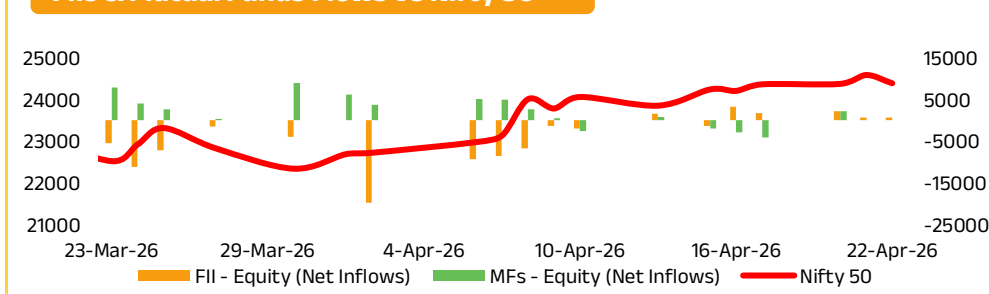
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	INR Cr.
				YTD
FII	595.21	-40,247	-40,247	-171,369
MF**	2129.54	13,491	13,491	166,100
DII	-1048.17	30,870	30,870	278,195

Source: SEBI, NSDL;**As on 20th Apr 2026;

F&O Trends

	Latest	Previous	Change %
Near Futures	24381.20	24584.50	-0.83%
Near Basis	3.10	7.90	-60.76%
Mid Futures	24510.40	24716.20	-0.83%
Mid Basis	132.30	139.60	-5.23%
Near Open Interest (Cr.)	1.62	1.64	-1.06%
Mid Open Interest (Cr.)	0.31	0.26	21.47%
Rollover (%)	20.36	17.68	15.12%
Put Call Ratio (OI)	1.02	1.35	-24.60%
Put Call Ratio(Vol)	1.03	1.04	-0.84%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3938	1369	51869
Index Options	2808960	2833141	400062
Stock Futures	24373	22816	469699
Stock Options	27348	26814	76435
Total	2864619	2884140	998065

Source: NSE

Global Equity Market

Global Indices	22-Apr-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3892.21	0.97%	1.65%	9.68%
Nasdaq 100 (U.S.)	26937.28	1.73%	2.80%	12.72%
FTSE (U.K.)	10476.46	-0.21%	-0.79%	5.63%
DAX Index (Germany)	24194.90	-0.31%	0.53%	8.11%
CAC 40 Index (France)	8156.43	-0.96%	-1.43%	6.40%
SSE Composite (China)	4106.26	0.52%	1.96%	3.77%
Nikkei (Japan)	59585.86	0.40%	2.50%	11.64%
Kospi (South Korea)	6417.93	0.46%	5.36%	11.01%
HangSeng (Hong Kong)	26163.24	-1.22%	0.83%	3.50%
Strait Times (Singapore)	5002.72	-0.24%	-0.37%	1.09%
Ibovespa Sao Paulo (Brazil)	192888.96	-1.65%	-2.45%	9.46%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8843.60	-1.18%	-1.50%	4.93%
Jakarta Composite (Indonesia)	7541.61	-0.24%	-1.08%	6.12%
KLSE (Malaysia)	1710.39	-0.29%	1.60%	-0.60%

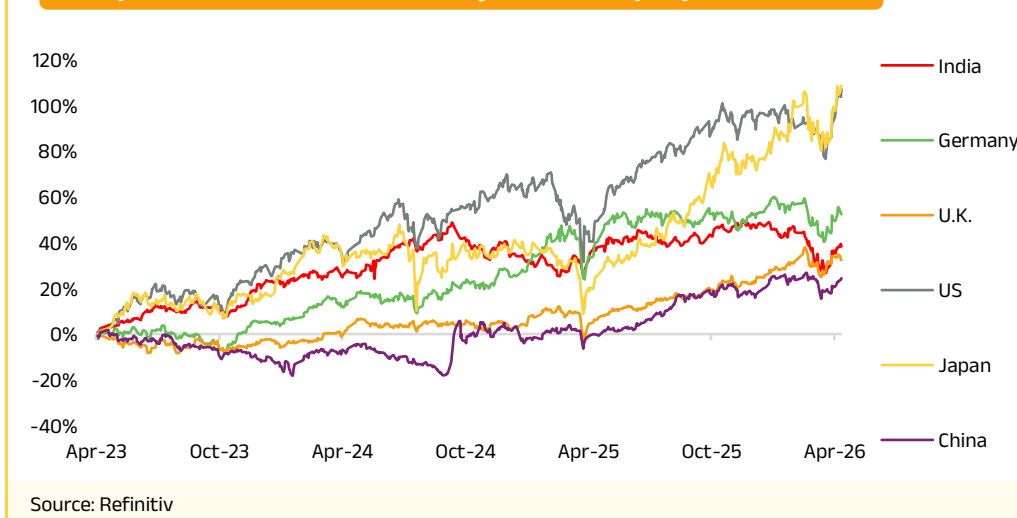
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

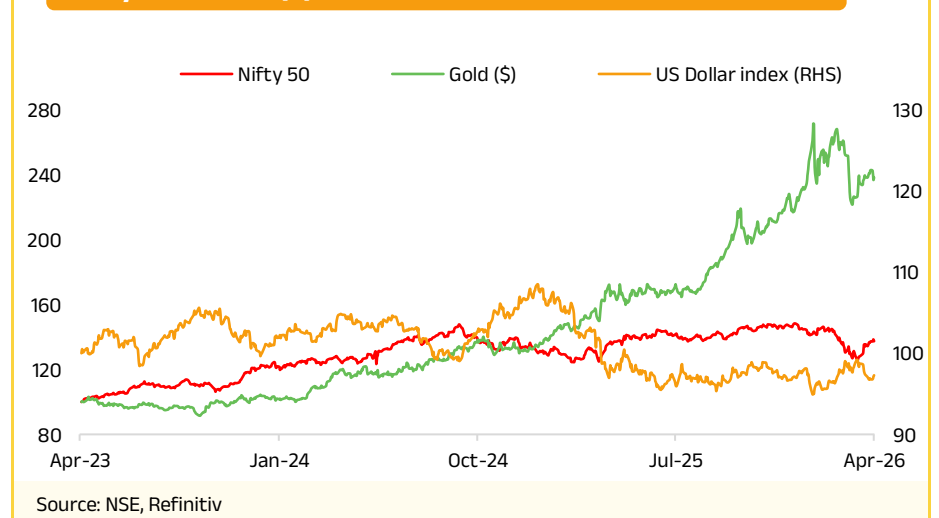
Commodity Prices	22-Apr-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	151,484	-0.19%	-0.49%	3.30%
Gold (\$/oz)	4,737.78	0.55%	-1.09%	5.57%
Silver (INR/1 kg)	248,376	-0.90%	-0.11%	7.75%
Silver (\$/oz)	77.69	1.30%	-1.72%	14.66%
Brent Crude(\$/bbl)	128.24	4.29%	-6.71%	8.35%
Crude Oil (INR/1 bbl)	8,379.00	0.47%	-1.69%	-5.73%
NYMEX Crude(\$/bbl)	94.51	1.20%	1.85%	-4.16%
Natural Gas (INR/1 mmbtu)	252.00	0.68%	3.83%	-13.91%
Aluminium (INR/1 kg)	370.00	1.09%	0.95%	10.25%
Copper (INR/1 kg)	1,269.65	0.46%	0.34%	7.89%
Nickel (INR/1 kg)	1,736.80	0.94%	0.73%	9.60%
Lead (INR/1 kg)	200.00	0.10%	1.19%	3.33%
Zinc (INR/1 kg)	351.15	1.42%	3.19%	13.00%
Mentha Oil (INR/1 kg)	1,139.30	0.12%	2.32%	5.89%
Baltic Dry Index	2,675	1.33%	7.69%	30.11%

Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Term of the Day



Earnings Quality

Definition: Earnings quality refers to the reliability and sustainability of a company's reported profits.



Explanation

High-quality earnings are supported by stable core operations and strong cash flows, rather than one-time items or accounting adjustments. Companies with good earnings quality tend to show consistency between profits and cash generation, making their performance more predictable. For equity investors, analysing earnings quality helps distinguish between sustainable growth and temporary profit spikes. Strong earnings quality reduces the risk of negative surprises and improves confidence in long-term valuation.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	6.62	-3.92	2.54	14.52
Flexi Cap Fund	7.98	-3.39	4.27	16.47
Mid Cap Fund	9.83	-0.07	10.74	22.47
Large & Mid Cap Fund	8.32	-2.16	6.32	18.84
Small Cap Fund	11.98	-0.96	7.78	20.11
Multi Cap Fund	9.04	-2.34	6.21	19.30
Focused Fund	8.07	-3.07	4.46	16.13
Value Fund	7.81	-0.68	6.46	18.93
Contra Fund	6.35	-4.10	3.19	18.91
ELSS	8.88	-3.20	4.90	16.91
Equity Savings	2.42	0.46	4.97	9.79
Arbitrage Fund	0.54	3.03	5.81	6.77
Dividend Yield Fund	6.98	-1.34	5.51	18.37
Aggressive Hybrid Fund	6.06	-2.18	4.31	14.24
Balanced Advantage	4.35	-1.67	3.50	11.67

Source: MFI 360 Explorer; Less than 1 year returns are absolute and greater than 1 year returns are CAGR. Category wise parent schemes are selected, which are available for investment to calculate average returns.

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.