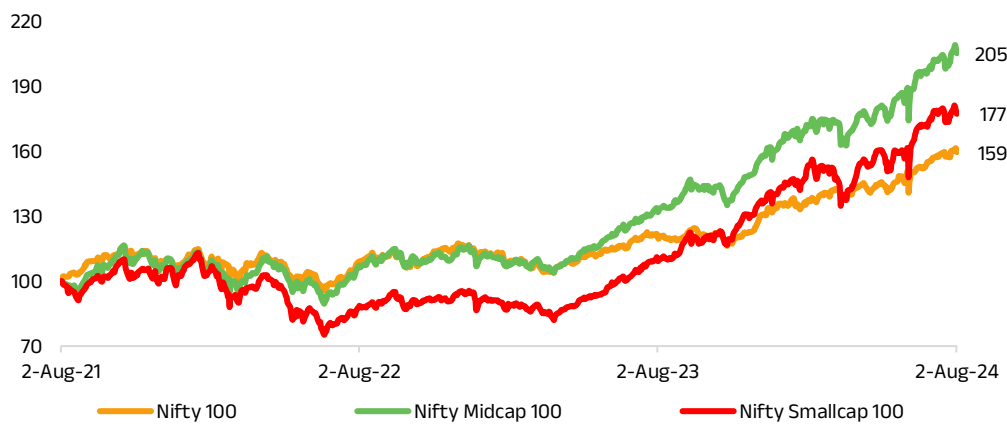


Broad Indices Historical Movement



Source: NSE

Broad Indices

	2-Aug-24	1 Day	1 Week	1 Month
Nifty 50	24,717.70	-1.17%	-0.47%	2.46%
Nifty 100	25,771.90	-1.10%	-0.27%	2.59%
Nifty 200	14,012.90	-1.08%	-0.19%	2.77%
Nifty 500	23,259.45	-1.05%	-0.14%	2.56%
Nifty Large Midcap 250	16,246.95	-1.04%	-0.02%	2.69%
Nifty Midcap 150	21,492.25	-0.99%	0.23%	2.79%
Nifty Next 50	73,328.15	-1.30%	-0.10%	2.12%
Nifty Smallcap 250	17,677.65	-0.83%	0.17%	1.95%

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

Smart Beta Index

Index	2-Aug-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,950.70	-2.29%	-0.63%	1.41%
NIFTY 500 Value 50	15,296.33	-1.95%	0.29%	3.85%
Nifty 200 Quality 30	21,931.00	-1.33%	-0.62%	5.01%
Nifty 50 Equal Weight	31,587.15	-1.44%	-0.37%	4.24%
NIFTY Alpha Low Volatility 30	29,546.15	-1.29%	0.09%	5.45%
Nifty High Beta 50	4,248.61	-1.12%	0.22%	1.60%
Nifty Low Volatility 50	24,946.16	-1.15%	-0.17%	4.98%
Nifty Midcap150 Momentum 50	64,203.20	-1.66%	0.02%	2.12%
Nifty PSE	11,530.30	-1.76%	1.11%	7.61%
Nifty SME Emerge	14,777.84	0.14%	-2.00%	0.12%
Nifty 100 ESG	4,936.80	-1.20%	-0.37%	3.40%

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

Sector Indices

Index	2-Aug-24	1 Day	1 Week	1 Month
Nifty Auto	25,714.45	-2.92%	-2.04%	2.32%
Nifty Bank	51,350.15	-0.41%	0.11%	-1.57%
Nifty Consumption	11,748.45	-0.71%	-0.10%	5.79%
Nifty Financial	23,365.90	-0.30%	0.21%	-0.57%
Nifty FMCG	61,745.15	-0.69%	-1.57%	8.96%
Nifty Healthcare	13,837.30	0.36%	0.98%	10.21%
Nifty IT	39,730.30	-2.41%	-3.04%	6.52%
Nifty Media	2,100.30	-0.42%	1.19%	1.85%
Nifty Metal	9,314.55	-2.70%	-1.16%	-5.30%
Nifty MNC	30,612.05	-1.85%	-1.02%	0.38%
Nifty Pharma	21,902.85	0.52%	1.39%	10.70%
Nifty Realty	1,037.15	-3.53%	-3.76%	-6.58%
Nifty Energy	44,334.25	-1.38%	2.53%	6.28%

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

Nifty 50 Top 5 Gainers

Company	2-Aug-24	Prev_Day	% Change	1 Week
Divi's Lab	4,991.25	4,917.90	1.49	4.19
HDFC Bank	1,659.15	1,638.80	1.24	2.53
Dr.Reddy	6,964.15	6,887.95	1.11	1.24
Sun Pharma	1,731.65	1,715.20	0.96	1.02
Kotak Bank	1,803.45	1,792.65	0.60	-0.57

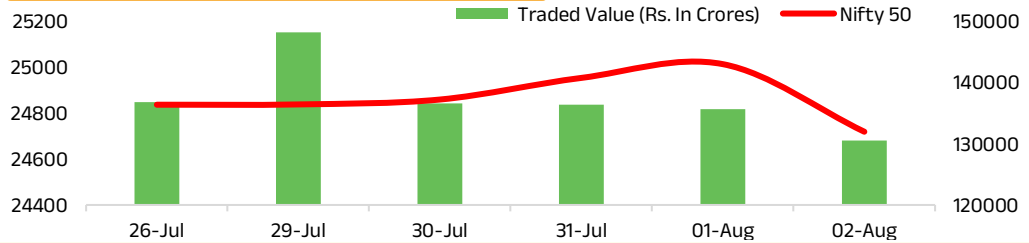
Source: NSE

Nifty 50 Top 5 Losers

Company	2-Aug-24	Prev_Day	% Change	1 Week
Eicher Motors Limited	4,726.70	4969	-4.87	-5.70
Maruti	12,726.40	13359	-4.74	0.50
Tata Motors	1,096.65	1144	-4.17	-1.94
United Phos	537.60	560	-4.08	-1.20
Hindalco	648.05	674	-3.78	-2.93

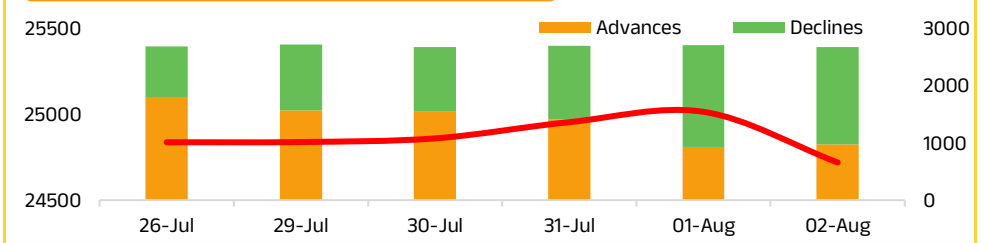
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

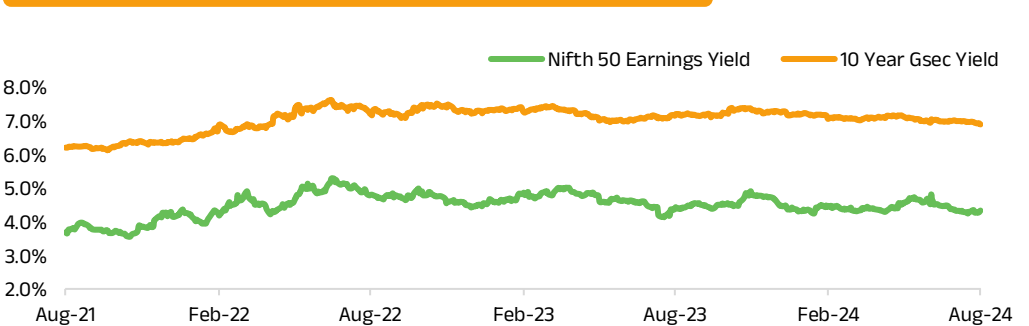
Indian equity markets snapped its five-day winning streak and closed with significant losses influenced by a sell-off in global markets. The key benchmark indices slipped from its previous high level as weak U.S. manufacturing data of Jul 2024 along with mixed earnings from tech companies sparked worries about a recession in the U.S.

Hindustan Zinc reported a 19% YoY jump in its consolidated net profit to Rs 2,345 crore for the quarter ended Jun 30, 2024. The same stood at Rs 1,964 crore in the last year quarter. Revenue from operations in the period came in at Rs 7,893 crore, up about 11% from Rs 7,111 crore in the corresponding period of the previous year.

Titan Company announced that its standalone net profit for the quarter ended Jun 30, 2024, amounted to Rs 770 crore, reflecting a decline of nearly 1% compared to the Rs 777 crore reported in the corresponding quarter of the previous year. The total revenue from operations stood at 11,263 crore.

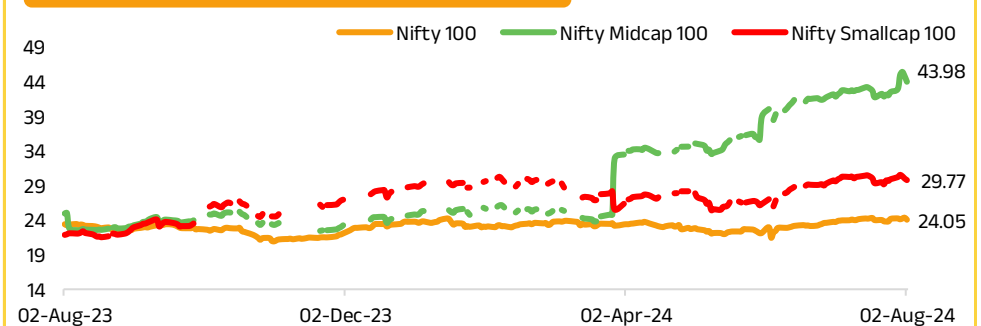
Britannia's consolidated profit for Q1FY25 increased by 10.5% YoY to Rs 506 crore, with revenue also rising by 4% YoY to Rs 4,130 crore. Its operating profit margins expanded 50 bps YoY to 17.7% while EBITDA also rose around 9% YoY to Rs 753 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



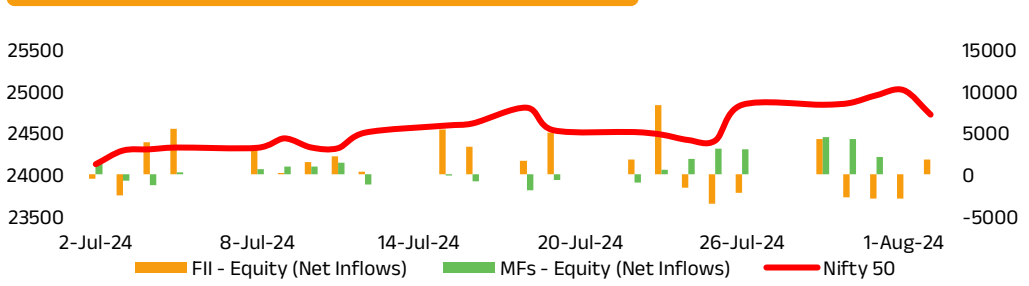
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	1826.35	-1,027	31,337	34,538
MF**	2107.19		20,601	212,027
DII	2965.94	2,629	26,115	262,242

Source: SEBI, NSDL;**As on 31st Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24711.50	25032.30	-1.28%
Near Basis	-6.15	21.35	-128.81%
Mid Futures	24835.80	25147.60	-1.24%
Mid Basis	118.10	136.70	-13.61%
Near Open Interest (Cr.)	1.52	1.57	-2.88%
Mid Open Interest (Cr.)	0.11	0.11	-2.15%
Rollover (%)	7.66	7.43	2.99%
Put Call Ratio (OI)	0.91	1.07	-15.15%
Put Call Ratio(Vol)	0.94	1.09	-13.96%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4166	2776	33598
Index Options	2298389	2340678	270323
Stock Futures	35905	34278	322615
Stock Options	53565	54934	37970
Total	2392026	2432666	664506

Source: NSE

Global Equity Market

Global Indices	2-Aug-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2914.73	-1.94%	-2.26%	-2.79%
Nasdaq 100 (U.S.)	18440.85	-2.38%	-3.06%	-7.85%
FTSE (U.K.)	8174.71	-1.31%	-1.34%	0.66%
DAX Index (Germany)	17661.22	-2.33%	-4.11%	-2.77%
CAC 40 Index (France)	7251.80	-1.61%	-3.54%	-3.80%
SSE Composite (China)	2905.34	-0.92%	0.50%	-3.06%
Nikkei (Japan)	35909.70	-5.81%	-4.67%	-10.39%
Kospi (South Korea)	2676.19	-3.65%	-2.04%	-3.76%
HangSeng (Hong Kong)	16945.51	-2.08%	-0.45%	-4.64%
Strait Times (Singapore)	3381.45	-1.12%	-1.31%	0.40%
Ibovespa Sao Paulo (Brazil)	125854.09	-1.21%	-1.29%	0.86%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7943.20	-2.11%	0.28%	2.92%
Jakarta Composite (Indonesia)	7308.12	-0.24%	0.27%	2.57%
KLSE (Malaysia)	1611.05	-0.81%	-0.11%	0.82%

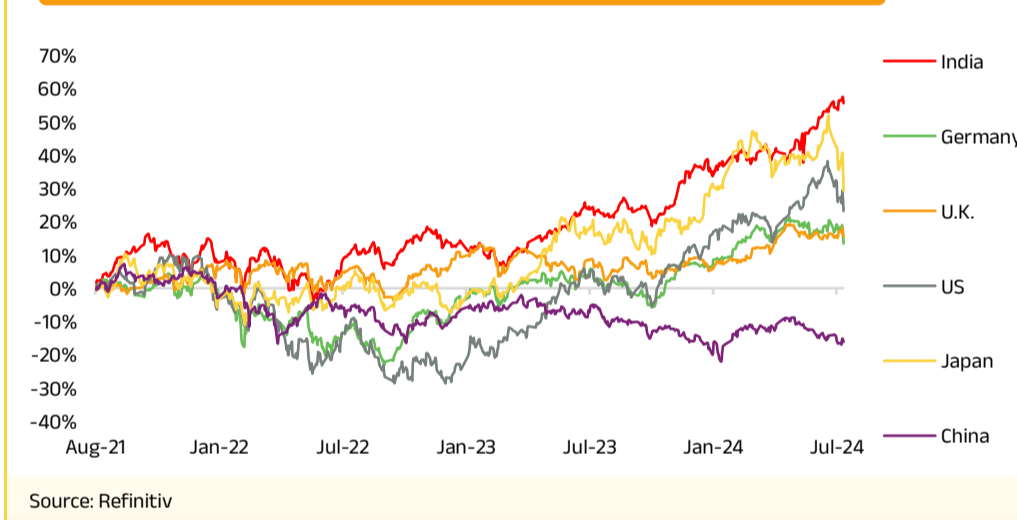
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

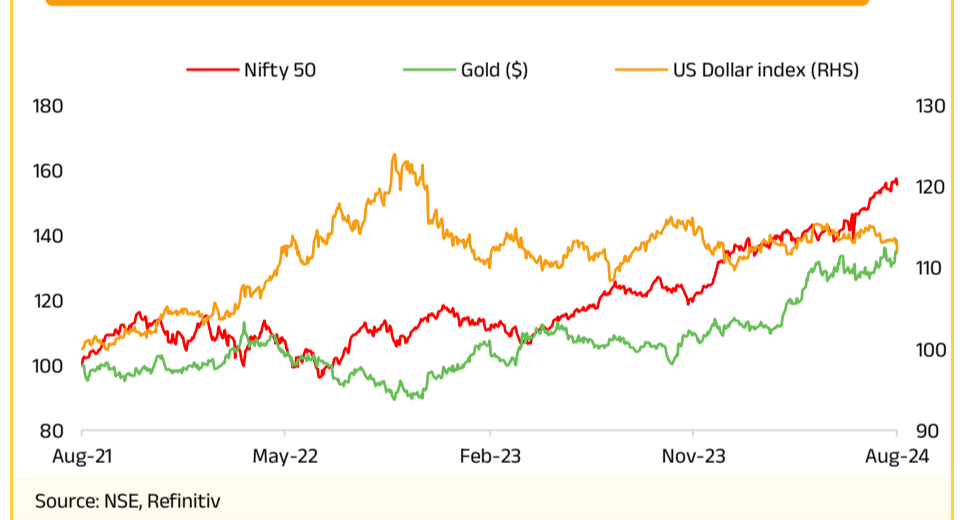
Commodity Prices	2-Aug-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	70,095	0.99%	3.26%	-1.89%
Gold (\$/oz)	2,443.29	-0.09%	2.42%	4.89%
Silver (INR/1 kg)	83,371	-0.03%	2.70%	-5.07%
Silver (\$/oz)	28.55	-0.02%	2.35%	-3.27%
Brent Crude(\$/bbl)	79.70	-3.70%	-3.50%	-11.22%
Crude Oil (INR/1 bbl)	6,389.00	-2.07%	-2.50%	-8.12%
NYMEX Crude(\$/bbl)	74.84	-3.54%	-4.58%	-10.89%
Natural Gas (INR/1 mmbtu)	164.80	-3.34%	-3.51%	-20.27%
Aluminium (INR/1 kg)	213.15	0.07%	-0.12%	-8.14%
Copper (INR/1 kg)	799.00	-0.45%	-0.89%	-5.89%
Nickel (INR/1 kg)	1,373.50	-0.58%	2.73%	-6.93%
Lead (INR/1 kg)	191.85	-1.11%	-2.96%	-2.74%
Zinc (INR/1 kg)	255.40	-0.58%	-0.74%	-7.03%
Mentha Oil (INR/1 kg)	1,003.00	1.73%	2.70%	6.10%
Baltic Dry Index	1,675	0.42%	-7.36%	-23.13%

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



Cash flow /fund flow statements, discounted cash flow

Definition: A Cash Flow Statement refers to the financial statement which states inflow and outflow of cash and cash equivalents during a particular period. Such statement is useful in case of assessing the ability of an enterprise to generate cash or cash equivalent and developing models to assess and compare the present value of future cash flows of different enterprises.



Explanation

Fund Flow Statement, on the other hand, shows the inflow and outflow of funds, that is, sources and applications of funds for a particular period. It is used to analyse the changes in the working capital position of a company. There exists a basic difference between cash flow and fund flow statements. While the former takes into account only transactions involving cash and cash equivalents, the latter is based on accrual system of accounting.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.70	17.29	35.36	17.48
Mid Cap Fund	2.20	23.60	52.06	23.81
Large & Mid Cap Fund	2.44	20.68	44.19	21.04
Small Cap Fund	1.90	18.99	47.92	24.12
Multi Cap Fund	2.45	19.72	45.62	22.12
Focused Fund	2.47	18.85	38.32	18.61
Value Fund	3.16	19.08	47.58	22.95
Contra Fund	4.06	21.23	50.10	25.24
ELSS	2.08	18.22	39.93	20.29
Equity Savings	1.31	7.79	15.85	9.66
Arbitrage Fund	0.64	3.71	7.57	5.59
Dividend Yield Fund	4.71	19.88	49.45	24.18
Aggressive Hybrid Fund	2.14	15.36	31.19	15.93
Balanced Advantage	2.00	11.13	24.86	12.77

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.

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