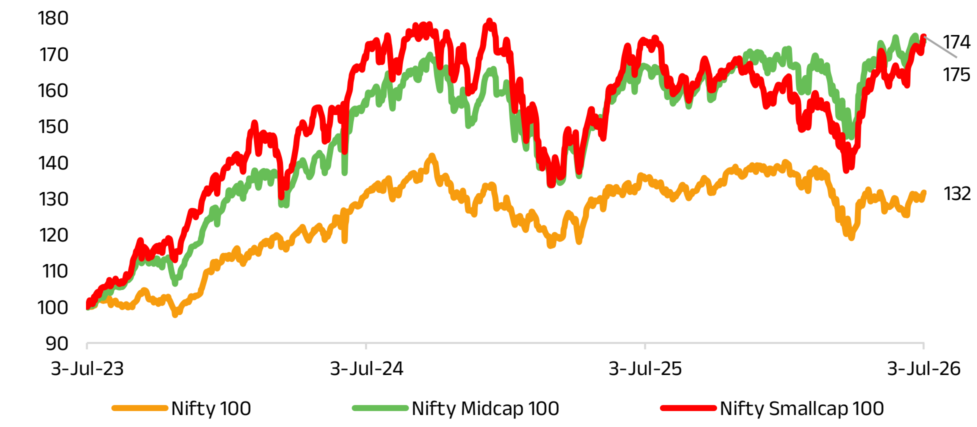
# Daily Equity Market Pulse - July 06, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

## Broad Indices Historical Movement




Source: NSE

## Broad Indices

| | 3-Jul-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty 50 | 24,270.85 | 0.39% | 0.89% | 3.70% |
| Nifty 100 | 25,301.90 | 0.28% | 0.75% | 3.66% |
| Nifty 200 | 13,992.05 | 0.19% | 0.73% | 3.42% |
| Nifty 500 | 23,301.15 | 0.16% | 0.81% | 3.78% |
| Nifty Large Midcap 250 | 16,643.80 | 0.03% | 0.67% | 3.32% |
| Nifty Midcap 150 | 22,884.35 | -0.22% | 0.59% | 2.99% |
| Nifty Next 50 | 72,268.95 | -0.21% | 0.10% | 3.45% |
| Nifty Smallcap 250 | 17,996.25 | 0.07% | 1.65% | 6.14% |

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

## Smart Beta Index

| Index | 3-Jul-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty 200 Momentum 30 Index | 30,507.85 | -1.11% | -2.17% | 1.72% |
| NIFTY 500 Value 50 | 16,176.70 | -0.03% | 0.00% | -2.31% |
| Nifty 200 Quality 30 | 19,970.90 | 0.36% | 1.07% | 0.51% |
| Nifty 50 Equal Weight | 33,015.00 | 0.54% | 1.35% | 2.74% |
| NIFTY Alpha Low Volatility 30 | 26,743.20 | 0.41% | 1.13% | 5.46% |
| Nifty High Beta 50 | 4,392.50 | 0.20% | 2.24% | 4.63% |
| Nifty Low Volatility 50 | 24,642.70 | 0.44% | 1.14% | 3.65% |
| Nifty Midcap150 Momentum 50 | 62,276.80 | -1.13% | -2.20% | 0.32% |
| Nifty PSE | 10,011.90 | -0.27% | 0.58% | -0.77% |
| Nifty SME Emerge | 14,144.70 | 0.34% | 0.71% | 3.89% |
| Nifty 100 ESG | 4,951.00 | 0.40% | 1.34% | 3.54% |

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

## Sector Indices

| Index | 3-Jul-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty Auto | 26,988.10 | -0.44% | 0.04% | 3.43% |
| Nifty Bank | 57,938.50 | -0.16% | -0.41% | 6.93% |
| Nifty Consumption | 11,795.70 | 0.24% | 1.75% | 5.93% |
| Nifty Financial | 26,875.05 | 0.05% | 0.39% | 7.69% |
| Nifty FMCG | 50,096.40 | 0.02% | 1.37% | 4.10% |
| Nifty Healthcare | 16,441.45 | 1.80% | 2.99% | 7.67% |
| Nifty IT | 27,439.40 | 1.76% | 0.40% | -6.62% |
| Nifty Media | 1,512.30 | -0.45% | 0.17% | 6.44% |
| Nifty Metal | 12,598.45 | 0.76% | 1.23% | -6.92% |
| Nifty MNC | 32,866.35 | -0.21% | 1.05% | 3.88% |
| Nifty Pharma | 25,745.15 | 1.72% | 3.11% | 6.89% |
| Nifty Realty | 890.80 | 2.19% | 7.81% | 16.81% |
| Nifty Energy | 39,178.60 | -1.33% | -1.16% | -2.53% |

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

## Nifty 50 Top 5 Gainers

| Company | 3-Jul-26 | Prev_Day | % Change | 1 Week |
|---|---|---|---|---|
| HCL Tech | 1,139.00 | 1,078.10 | 5.65 | 3.48 |
| IndusInd Bank | 974.35 | 943.50 | 3.27 | 6.03 |
| United Phos | 607.40 | 588.75 | 3.17 | 2.86 |
| Shree Cements Limited | 26,765.00 | 26,220.00 | 2.08 | 4.00 |
| Bharti Airtel | 1,910.40 | 1,875.00 | 1.89 | 3.23 |

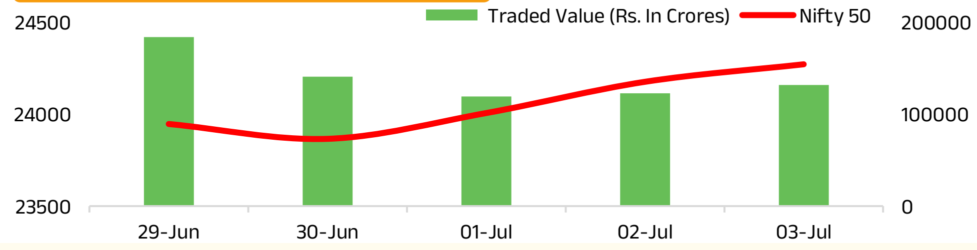
Source: NSE

## Nifty 50 Top 5 Losers

| Company | 3-Jul-26 | Prev_Day | % Change | 1 Week |
|---|---|---|---|---|
| Axis Bank | 1,342.10 | 1363 | -1.50 | -2.55 |
| M&M | 3,136.90 | 3175 | -1.21 | -1.42 |
| SBI | 1,040.00 | 1052 | -1.10 | -0.52 |
| L&T Ltd. | 4,026.60 | 4059 | -0.81 | -4.50 |
| Tech Mahindra | 1,410.10 | 1421 | -0.79 | -1.88 |

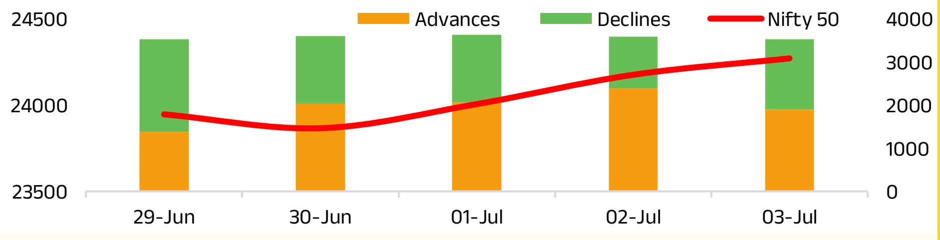
Source: NSE

## Nifty 50 vs NSE Trading Volume




Source: NSE

## Nifty 50 vs Advances & Declines




Source: NSE

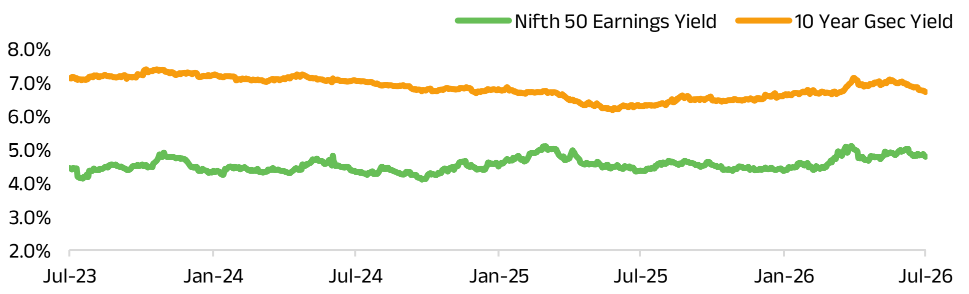
Indian equity markets advanced for a third consecutive session, although gains were pared from intraday highs as investors indulged in profit-booking at elevated levels. Market sentiment remained broadly positive, supported by the recent decline in crude oil prices to near pre-conflict levels and growing expectations that the U.S. Federal Reserve may keep interest rates unchanged in the coming months after U.S. non-farm payroll growth slowed sharply in Jun 2026.

TVS Motor Company (TVSM), part of the TVS Group, became India's largest two-wheeler (2W) manufacturer by total sales volume, including both domestic and international markets, in Jun. 2026. The company is already the market leader in the electric two-wheeler (e2W) segment.

The Adani Group has sought approval from the Kerala government for its $1.4 billion stake sale in Adani Vizhinjam Port Private Ltd. (AVPPL), the private concessionaire and operating company for Vizhinjam International Seaport Ltd. (VISL) in Thiruvananthapuram.

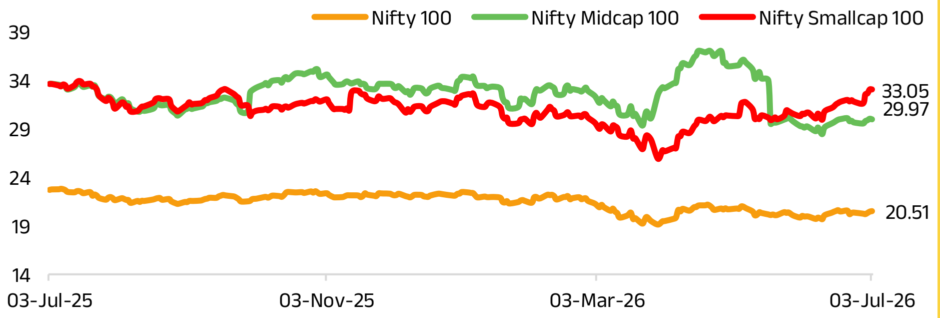
HCLTech said it had won a $1.14 billion deal from an undisclosed European company, marking a significant boost at the start of the second quarter, as IT services companies continue to face headwinds from restrained discretionary spending by clients.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



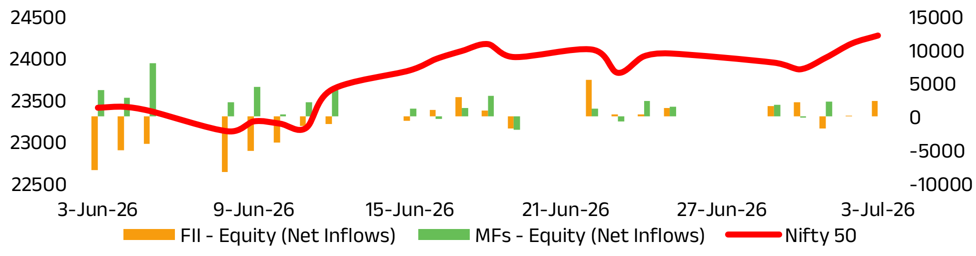

Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## PE Comparison across Market cap




Source: NSE

## FIIs & Mutual Funds Flows Vs Nifty 50




Source: FPI NSDL, SEBI, NSE

## Institutional Flows (Equity)

INR Cr.

| Description | Net | MTD | QTD | YTD |
|---|---|---|---|---|
| FII | 2348.96 | 708 | 708 | -273,565 |
| MF** | 2215.82 | 2,216 | 2,216 | 296,660 |
| DII | -1953.89 | 2,990 | 2,990 | 466,881 |

Source: SEBI, NSDL;**As on 1st Jul 2026;

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## F&O Trends

| | Latest | Previous | Change % |
|---|---|---|---|
| Near Futures | 24352.70 | 24265.00 | 0.36% |
| Near Basis | 81.85 | 89.30 | -8.34% |
| Mid Futures | 24445.20 | 24354.00 | 0.37% |
| Mid Basis | 174.35 | 178.30 | -2.22% |
| Near Open Interest (Cr.) | 1.71 | 1.72 | -1.01% |
| Mid Open Interest (Cr.) | 0.16 | 0.16 | 1.85% |
| Rollover (%) | 9.29 | 8.88 | 4.62% |
| Put Call Ratio (OI) | 1.07 | 1.28 | -16.87% |
| Put Call Ratio(Vol) | 1.05 | 0.92 | 14.69% |

Source: NSE

## FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---|---|---|---|
| Index Futures | 2276 | 1801 | 51476 |
| Index Options | 4177508 | 4228977 | 403054 |
| Stock Futures | 20188 | 18762 | 466358 |
| Stock Options | 14803 | 14241 | 38815 |
| Total | 4214776 | 4263781 | 959703 |

Source: NSE

## Global Equity Market

| Global Indices | 3-Jul-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Russell 1000 Index (U.S.)[1] | 4084.45 | 0.00% | 1.76% | -0.55% |
| Nasdaq 100 (U.S.)[1] | 29329.21 | -1.61% | 0.72% | -4.06% |
| FTSE (U.K.) | 10679.03 | 0.25% | 1.63% | 3.36% |
| DAX Index (Germany) | 25779.31 | 0.78% | 4.49% | 3.97% |
| CAC 40 Index (France) | 8508.07 | 0.39% | 1.47% | 4.39% |
| SSE Composite (China) | 4043.64 | 0.37% | 0.41% | -0.99% |
| Nikkei (Japan) | 69744.07 | 1.47% | 0.55% | 1.96% |
| Kospi (South Korea) | 8088.34 | 5.76% | -3.84% | -8.10% |
| HangSeng (Hong Kong) | 23350.03 | 1.28% | 2.99% | -8.91% |
| Strait Times (Singapore) | 5244.29 | 0.52% | 1.01% | 2.06% |
| Ibovespa Sao Paulo (Brazil) | 174070.27 | 0.74% | 0.45% | 2.20% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8844.40 | 1.37% | 0.92% | 0.67% |
| Jakarta Composite (Indonesia) | 5875.78 | 2.28% | -0.35% | -1.10% |
| KLSE (Malaysia) | 1679.05 | 1.04% | 0.68% | 0.38% |

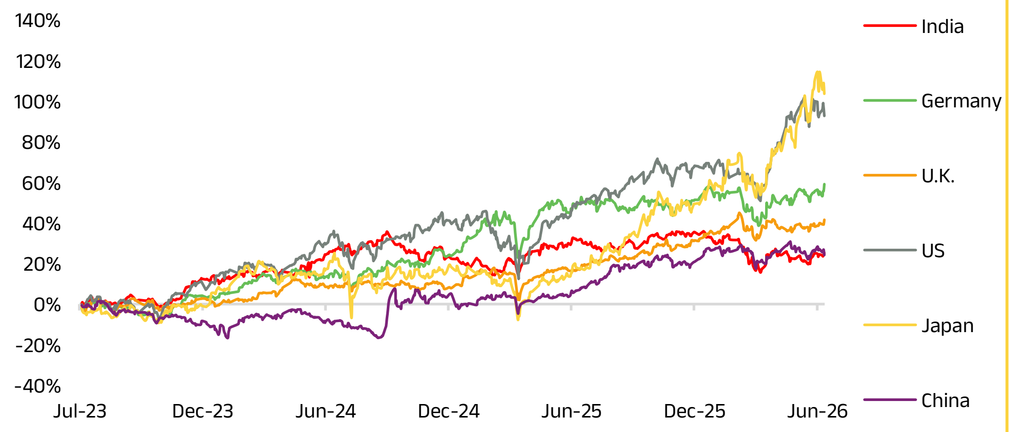
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

| Commodity Prices | 3-Jul-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Gold (INR/10 gm) | 145,764 | 2.32% | 4.23% | -5.67% |
| Gold ($/oz) | 4,174.90 | 1.26% | 2.12% | -5.80% |
| Silver (INR/1 kg) | 233,669 | 2.22% | 6.85% | -10.79% |
| Silver ($/oz) | 62.40 | 2.28% | 5.48% | -14.17% |
| Brent Crude($/bbl) | 67.26 | 0.54% | -2.61% | -33.27% |
| Crude Oil (INR/1 bbl) | 6,544.00 | 0.72% | -1.76% | -26.66% |
| NYMEX Crude($/bbl) | 69.73 | 0.14% | -0.67% | -29.93% |
| Natural Gas (INR/1 mmbtu) | 304.50 | -0.16% | -0.16% | 1.03% |
| Aluminium (INR/1 kg) | 334.75 | 1.55% | 0.83% | -15.33% |
| Copper (INR/1 kg) | 1,309.15 | 2.36% | 1.34% | -4.82% |
| Nickel (INR/1 kg) | 1,582.00 | 0.87% | -2.62% | -14.32% |
| Lead (INR/1 kg) | 205.35 | -0.05% | -1.13% | -2.45% |
| Zinc (INR/1 kg) | 369.05 | 1.25% | 2.33% | -1.64% |
| Mentha Oil (INR/1 kg) | 1,148.20 | 0.10% | 4.98% | 11.16% |
| Baltic Dry Index | 2,717 | 2.53% | 7.65% | -13.03% |

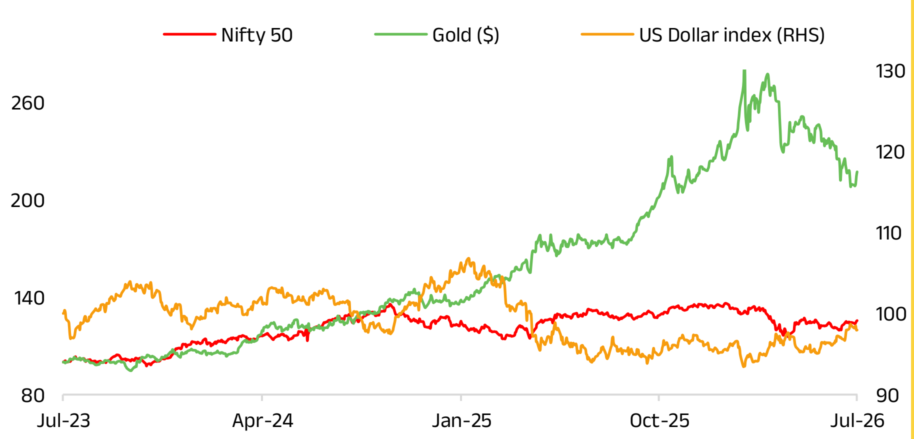
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Comparative Performance of Major Global Equity Market




Source: Refinitiv

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




Source: NSE, Refinitiv

## Term of the Day

### Risk Management

Definition: Risk management is a process by means of which risks are identified, assessed, monitored and finally mitigated for any process or organisation. It is a process which is considered very critical for proper functioning and maintenance of any organisation. Some of the risks which a company is generally exposed to are financial risk, environmental risk, theft risk besides others.

### Explanation

Risk Management is a critical part of organization's strategy and it is widely seen as an essential part of the business. Companies face various risks and it is strategically very important to make provisions for them and mitigate them wherever possible. Effective risk management practices of the organization makes it less vulnerable and better prepared for uncertainty. Some of the common methods of mitigating risks are transferring it to a third party (insurance), budgeting for the same, implementing stringent control measures and finally creating a backup plan. Let us take an example of a company X based in India.

## Mutual Fund Category Performance - Equity & Hybrid

| Category | 1 Month | 6 Month | 1 Year | 3 Year |
|---|---|---|---|---|
| Large Cap Fund | 4.38 | -4.63 | -1.68 | 11.00 |
| Flexi Cap Fund | 4.76 | -0.87 | 0.98 | 13.37 |
| Mid Cap Fund | 4.26 | 3.34 | 4.85 | 18.95 |
| Large & Mid Cap Fund | 4.56 | -0.25 | 1.65 | 15.54 |
| Small Cap Fund | 6.26 | 9.15 | 6.68 | 17.81 |
| Multi Cap Fund | 4.80 | 1.84 | 2.98 | 16.36 |
| Focused Fund | 5.12 | -0.84 | 1.63 | 13.31 |
| Value Fund | 3.77 | -1.48 | 1.86 | 15.11 |
| Contra Fund | 4.27 | -4.71 | -1.42 | 15.25 |
| ELSS | 4.79 | -0.93 | 0.13 | 13.52 |
| Equity Savings | 2.02 | 0.84 | 3.64 | 8.50 |
| Arbitrage Fund | 0.81 | 2.98 | 5.81 | 6.70 |
| Dividend Yield Fund | 3.18 | -2.22 | 0.68 | 14.98 |
| Aggressive Hybrid Fund | 3.81 | -1.33 | 0.92 | 11.71 |
| Balanced Advantage | 3.13 | -1.18 | 1.09 | 9.73 |

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.

[1]Data as on 02 Jul, 2026