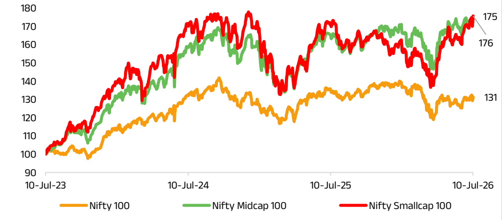
Daily Equity Market Pulse - July 13, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	10-Jul-26	1 Day	1 Week	1 Month
Nifty 50	24,206.90	1.02%	-0.26%	4.27%
Nifty 100	25,255.10	1.06%	-0.18%	4.36%
Nifty 200	14,009.25	1.13%	0.12%	4.56%
Nifty 500	23,348.40	1.16%	0.20%	5.01%
Nifty Large Midcap 250	16,730.55	1.21%	0.52%	5.02%
Nifty Midcap 150	23,166.50	1.36%	1.23%	5.69%
Nifty Next 50	72,391.80	1.27%	0.17%	4.68%
Nifty Smallcap 250	18,118.90	1.36%	0.68%	7.96%

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

Smart Beta Index

Index	10-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,606.65	1.05%	0.32%	2.93%
NIFTY 500 Value 50	16,082.00	1.05%	-0.59%	-0.44%
Nifty 200 Quality 30	20,027.25	0.94%	0.28%	1.49%
Nifty 50 Equal Weight	32,788.30	0.92%	-0.69%	3.35%
NIFTY Alpha Low Volatility 30	26,884.50	0.51%	0.53%	5.73%
Nifty High Beta 50	4,462.55	2.27%	1.59%	8.32%
Nifty Low Volatility 50	24,606.60	0.60%	-0.15%	3.75%
Nifty Midcap150 Momentum 50	62,905.75	1.27%	1.01%	2.75%
Nifty PSE	9,911.25	1.08%	-1.01%	0.28%
Nifty SME Emerge	14,040.65	0.32%	-0.74%	3.81%
Nifty 100 ESG	4,958.20	1.09%	0.15%	4.44%

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

Sector Indices

Index	10-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	26,860.75	0.69%	-0.47%	3.98%
Nifty Bank	58,045.90	1.39%	0.19%	5.35%
Nifty Consumption	11,737.75	0.32%	-0.49%	5.69%
Nifty Financial	26,831.05	1.32%	-0.16%	6.45%
Nifty FMCG	49,310.60	-0.08%	-1.57%	0.72%
Nifty Healthcare	16,337.80	0.19%	-0.63%	5.75%
Nifty IT	28,010.35	1.96%	2.08%	-0.95%
Nifty Media	1,484.30	0.10%	-1.85%	3.09%
Nifty Metal	12,688.90	1.48%	0.72%	-0.61%
Nifty MNC	32,688.00	0.68%	-0.54%	4.14%
Nifty Pharma	25,674.10	0.07%	-0.28%	6.26%
Nifty Realty	938.60	3.49%	5.37%	25.46%
Nifty Energy	39,242.05	1.04%	0.16%	0.75%

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

Nifty 50 Top 5 Gainers

Company	10-Jul-26	Prev_Day	% Change	1 Week
HDFC Standard Life Insurance	567.70	551.85	2.87	0.00
SBI Life Insurance Company Lir	1,862.90	1,821.70	2.26	4.15
United Phos	594.75	581.85	2.22	-2.08
RIL	1,307.80	1,279.80	2.19	0.29
Axis Bank	1,323.70	1,297.60	2.01	-1.37

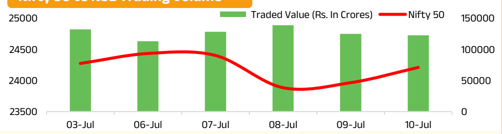
Source: NSE

Nifty 50 Top 5 Losers

Company	10-Jul-26	Prev_Day	% Change	1 Week
Bharti Airtel	1,920.40	1931	-0.55	0.52
Sun Pharma	1,935.50	1939	-0.17	1.61
Britannia Industries Lir	5,353.00	5362	-0.16	-0.48
Coal India	429.30	430	-0.14	-2.14
Cipla	1,439.40	1441	-0.13	-1.29

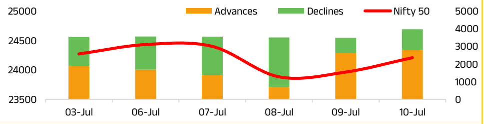
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

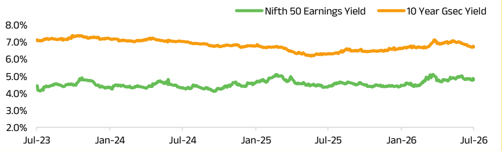
Indian equity markets advanced, supported by positive global cues after a U.S. official reaffirmed Washington's commitment to resolving the Iran conflict through continued technical discussions. Investor sentiment was further lifted by stronger-than-expected Q1FY27 results from a leading domestic IT major, boosting confidence in the earnings outlook.

HFCL has secured an export order worth Rs. 495.8 crore from an international data centre company for the supply of optical fibre cables. The order is scheduled to be executed by Dec 2026.

India's state-owned Oil and Natural Gas Corporation (ONGC) has approved an expansion of the country's strategic oil reserves, underscoring efforts to strengthen energy security and resilience following disruptions caused by the Iran conflict.

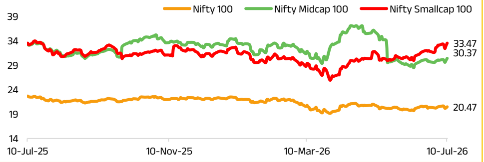
Tata Consultancy Services (TCS), India's largest information technology (IT) services company, surpassed analyst expectations in terms of growth. The company also reported that revenue from artificial intelligence (AI related deals increased by more than 13% YoY.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



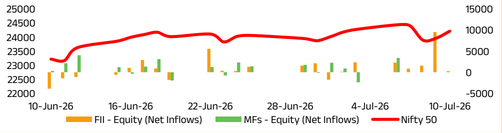
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	265.06	15,157	15,157	-259,116
MF**	3388.81	4,118	4,118	298,562
DII	2019.68	11,265	11,265	475,157

Source: SEBI, NSDL;**As on 6th Jul 2026;

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F&O Trends

	Latest	Previous	Change %
Near Futures	24241.90	23999.30	1.01%
Near Basis	35.00	36.50	-4.11%
Mid Futures	24328.70	24090.80	0.99%
Mid Basis	121.80	128.00	-4.84%
Near Open Interest (Cr.)	1.66	1.69	-1.36%
Mid Open Interest (Cr.)	0.19	0.18	1.90%
Rollover (%)	12.28	11.84	3.70%
Put Call Ratio (OI)	1.25	0.94	32.77%
Put Call Ratio(Vol)	0.95	0.91	3.40%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2342	1960	53080
Index Options	5160462	5208216	432109
Stock Futures	20547	19267	462600
Stock Options	26628	26438	65985
Total	5209979	5255882	1013774

Source: NSE

Global Equity Market

Global Indices	10-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4125.21	0.33%	1.00%	4.26%
Nasdaq 100 (U.S.)	29825.11	0.33%	1.69%	4.62%
FTSE (U.K.)	10497.29	0.24%	-1.70%	2.36%
DAX Index (Germany)	25067.09	-0.20%	-2.76%	3.60%
CAC 40 Index (France)	8338.97	0.15%	-1.99%	2.17%
SSE Composite (China)	3996.16	-1.00%	-1.17%	0.07%
Nikkei (Japan)	68557.73	1.20%	-1.70%	6.82%
Kospi (South Korea)	7475.94	2.52%	-7.57%	-3.30%
HangSeng (Hong Kong)	24175.12	0.60%	3.53%	-0.95%
Strait Times (Singapore)	5469.29	0.65%	4.29%	10.29%
Ibovespa Sao Paulo (Brazil)	177866.37	2.97%	2.18%	5.48%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8806.00	0.50%	-0.43%	1.76%
Jakarta Composite (Indonesia)	5924.36	0.20%	0.83%	0.37%
KLSE (Malaysia)	1691.49	0.83%	0.74%	0.75%

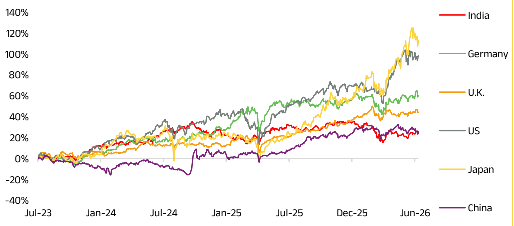
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	10-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	142,741	-0.32%	-2.07%	-2.70%
Gold ($/oz)	4,120.08	-0.02%	-1.31%	1.14%
Silver (INR/1 kg)	220,540	-1.46%	-5.62%	-5.61%
Silver ($/oz)	59.84	-0.25%	-4.10%	-6.04%
Brent Crude($/bbl)	72.65	-1.85%	8.01%	-25.86%
Crude Oil (INR/1 bbl)	6,875.00	-1.80%	5.06%	-18.49%
NYMEX Crude($/bbl)	72.35	-0.96%	3.76%	-22.56%
Natural Gas (INR/1 mmbt	287.30	-6.08%	-5.65%	-4.33%
Aluminium (INR/1 kg)	339.15	-0.40%	1.31%	-9.42%
Copper (INR/1 kg)	1,305.20	1.25%	-0.30%	-1.58%
Nickel (INR/1 kg)	1,606.30	0.94%	1.54%	-8.33%
Lead (INR/1 kg)	205.50	-0.27%	0.07%	-1.13%
Zinc (INR/1 kg)	378.60	-0.37%	2.59%	3.71%
Mentha Oil (INR/1 kg)	1,393.90	2.20%	21.40%	30.60%
Baltic Dry Index	2,944	1.17%	8.35%	6.24%

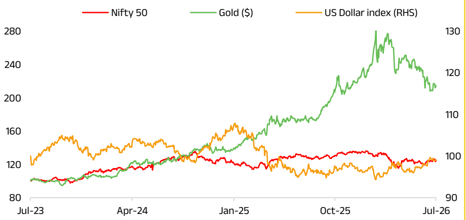
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	5.12	-2.40	-1.63	11.02
Flexi Cap Fund	5.81	1.80	1.30	13.50
Mid Cap Fund	6.30	7.19	6.54	19.40
Large & Mid Cap Fund	5.84	2.93	2.39	15.69
Small Cap Fund	7.92	13.83	7.35	17.97
Multi Cap Fund	6.31	5.37	3.69	16.45
Focused Fund	6.25	1.83	2.06	13.47
Value Fund	5.10	1.47	1.88	15.06
Contra Fund	5.25	-2.15	-1.36	15.17
ELSS	5.72	1.95	0.68	13.65
Equity Savings	2.03	1.67	3.69	8.50
Arbitrage Fund	0.50	2.91	5.76	6.67
Dividend Yield Fund	3.64	-0.27	0.34	14.68
Aggressive Hybrid Fun	4.44	0.80	1.12	11.74
Balanced Advantage	3.59	0.46	1.21	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.

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