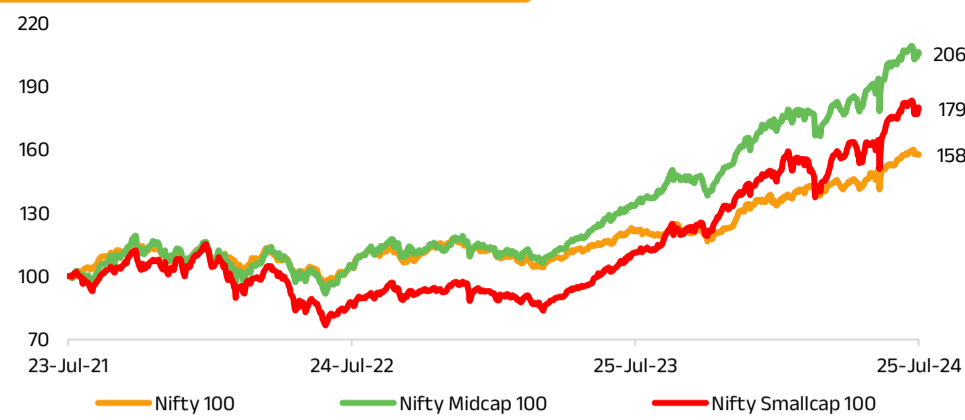


Broad Indices Historical Movement



Source: NSE

Broad Indices

	25-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,406.10	-0.03%	-1.59%	2.89%
Nifty 100	25,407.50	0.07%	-1.46%	2.62%
Nifty 200	13,801.00	0.02%	-1.33%	2.60%
Nifty 500	22,917.25	-0.02%	-1.26%	2.44%
Nifty Large Midcap 250	15,976.60	-0.09%	-1.15%	2.12%
Nifty Midcap 150	21,080.45	-0.25%	-0.82%	1.67%
Nifty Next 50	72,210.25	0.51%	-1.23%	1.19%
Nifty Smallcap 250	17,483.80	-0.28%	-0.53%	2.49%

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

Smart Beta Index

Index	25-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,253.25	0.60%	-1.60%	-0.67%
NIFTY 500 Value 50	15,015.11	0.45%	-1.52%	3.17%
Nifty 200 Quality 30	21,719.75	-0.20%	-0.83%	5.64%
Nifty 50 Equal Weight	31,025.05	0.19%	-1.34%	3.72%
NIFTY Alpha Low Volatility 30	29,080.10	0.31%	-0.45%	4.85%
Nifty High Beta 50	4,136.07	-0.91%	-3.19%	-0.82%
Nifty Low Volatility 50	24,663.60	0.24%	-0.68%	5.21%
Nifty Midcap150 Momentum 50	63,172.50	-0.20%	-1.98%	-0.02%
Nifty PSE	11,237.65	1.18%	-0.45%	6.32%
Nifty SME Emerge	14,924.58	0.91%	1.57%	3.21%
Nifty 100 ESG	4,864.40	-0.01%	-1.39%	3.39%

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

Sector Indices

Index	25-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,627.35	1.26%	0.20%	1.49%
Nifty Bank	50,888.75	-0.83%	-3.29%	-3.26%
Nifty Consumption	11,537.65	-0.25%	0.10%	4.06%
Nifty Financial	23,049.50	-0.50%	-3.09%	-1.96%
Nifty FMCG	62,139.50	-0.07%	1.49%	10.48%
Nifty Healthcare	13,338.70	0.61%	1.09%	7.47%
Nifty IT	40,055.45	-0.15%	0.11%	13.07%
Nifty Media	2,041.40	0.81%	1.58%	2.51%
Nifty Metal	9,148.00	-1.29%	-5.07%	-7.20%
Nifty MNC	30,576.90	0.14%	-1.30%	1.39%
Nifty Pharma	21,105.50	0.94%	1.62%	8.05%
Nifty Realty	1,065.35	-0.83%	-5.11%	-4.50%
Nifty Energy	42,770.30	1.27%	-1.08%	6.25%

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

Nifty 50 Top 5 Gainers

Company	25-Jul-24	Prev_Day	% Change	1 Week
Tata Motors	1,090.95	1,027.70	6.15	6.48
ONGC	335.80	319.55	5.09	1.24
Indian Oil	176.85	168.79	4.78	4.27
SBI Life Insurance Company	1,695.40	1,632.95	3.82	2.14
BPCL	326.15	314.95	3.56	2.51

Source: NSE

Nifty 50 Top 5 Losers

Company	25-Jul-24	Prev_Day	% Change	1 Week
Axis Bank	1,175.90	1239	-5.11	-10.20
Titan Industries Ltd.	3,405.80	3478	-2.09	4.41
ICICI Bank	1,197.90	1223	-2.05	-4.19
United Phos	529.45	537	-1.42	-5.23
IndusInd Bank	1,379.10	1397	-1.26	-5.34

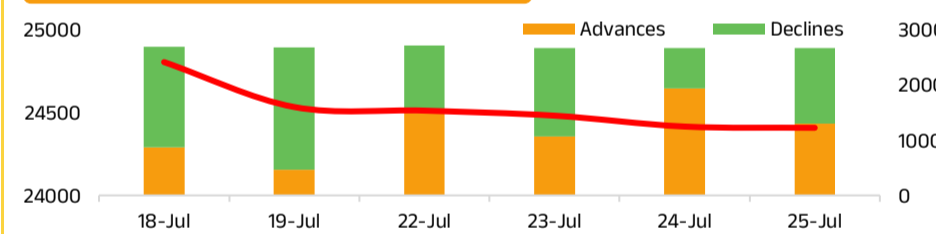
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

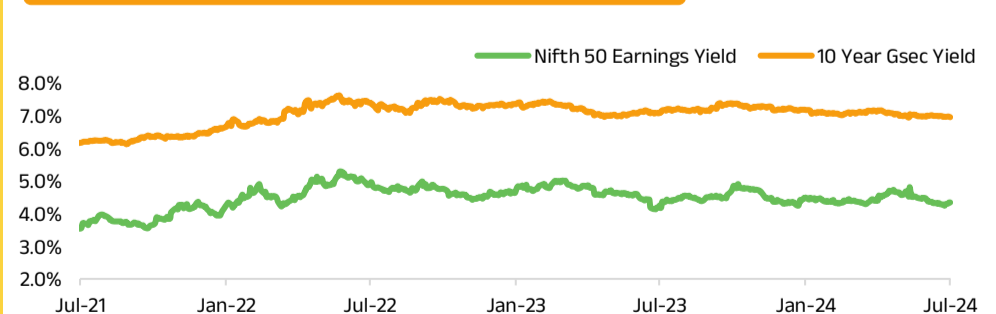
Indian equity markets extended its losses into the fifth consecutive session amid weak global cues. The key benchmark indices opened with significant losses due to heavy profit-taking in banking, IT, metals and realty stocks, following uncertainty over rate cuts and news flow around the U.S. Presidential elections. Further, lower-than-expected earnings growth from major banks kept the markets under pressure.

Indian Energy Exchange (IEX) recorded a significant increase in consolidated net profit to Rs. 96.44 crore for Q1FY25, representing a growth of more than 27% mainly on the back of higher revenues. Total income rose to Rs.154.47 crore during the quarter from Rs. 127.36 crore in the same period a year ago.

Tech Mahindra announced a 23% YoY increase in its consolidated net profit to Rs. 851 crore for Q1FY25. This figure fell slightly short of the Street's expectation of Rs. 870 crore. Revenue from operations was down 1% YoY to Rs. 13,005 crore in the Apr-Jun 2024 period. On a sequential basis, profit after tax increased 28% and revenue rose 1%.

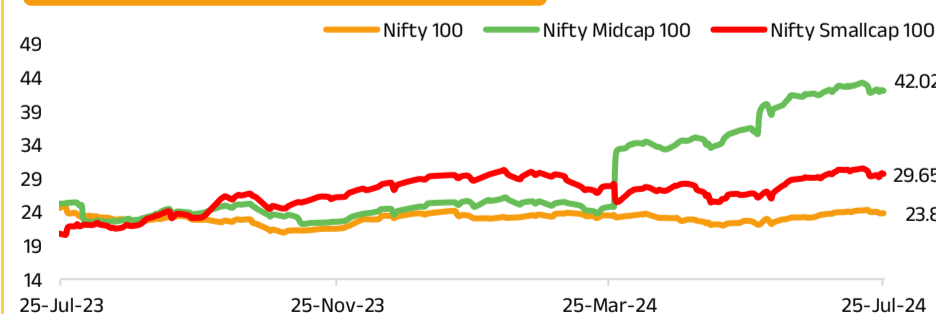
Nestle announced a 7% YoY increase in profit to Rs. 746.6 crores for Q1FY25, up from Rs. 698.3 crores in Q1FY24. Additionally, the revenue saw a 3.3% YoY growth to Rs. 4,814 crores compared to Rs. 4,658.5 crores in Q1FY24.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



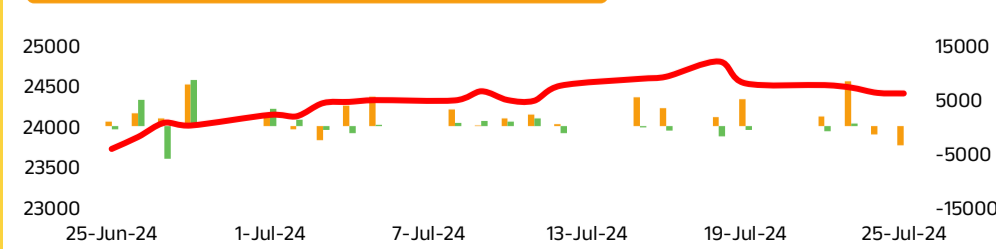
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-3508.22	35,886	35,886	39,086
MF**	542.05	1,707	1,707	193,133
DII	2431.69	6,115	6,115	242,242

Source: SEBI, NSDL,**As on 23rd Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24405.30	24388.80	0.07%
Near Basis	-0.85	-24.75	-96.57%
Mid Futures	24455.40	24492.20	-0.15%
Mid Basis	49.30	78.70	-37.36%
Near Open Interest (Cr.)	0.60	0.93	-35.77%
Mid Open Interest (Cr.)	1.30	0.84	54.96%
Rollover (%)	69.69	48.99	42.25%
Put Call Ratio (OI)	1.01	0.87	15.95%
Put Call Ratio(Vol)	0.88	0.84	4.09%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	12303	15892	40553
Index Options	5089096	5024711	379691
Stock Futures	116233	119241	328227
Stock Options	34381	34203	50511
Total	5252013	5194046	798982

Source: NSE

Global Equity Market

Global Indices	25-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2948.68	-0.39%	-2.43%	-0.97%
Nasdaq 100 (U.S.)	18830.58	-1.06%	-4.44%	-4.42%
FTSE (U.K.)	8186.35	0.40%	-0.23%	-0.74%
DAX Index (Germany)	18298.72	-0.48%	-0.31%	0.67%
CAC 40 Index (France)	7427.02	-1.15%	-2.10%	-3.07%
SSE Composite (China)	2886.74	-0.52%	-3.04%	-2.14%
Nikkei (Japan)	37869.51	-3.28%	-5.62%	-3.33%
Kospi (South Korea)	2710.65	-1.74%	-4.03%	-2.30%
HangSeng (Hong Kong)	17004.97	-1.77%	-4.35%	-5.91%
Strait Times (Singapore)	3430.45	-0.88%	-1.17%	3.13%
Ibovespa Sao Paulo (Brazil)	125954.09	-0.37%	-1.33%	2.96%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7861.20	-1.29%	-2.18%	0.29%
Jakarta Composite (Indonesia)	7240.28	-0.31%	-1.10%	5.20%
KLSE (Malaysia)	1615.18	-0.37%	-1.14%	1.88%

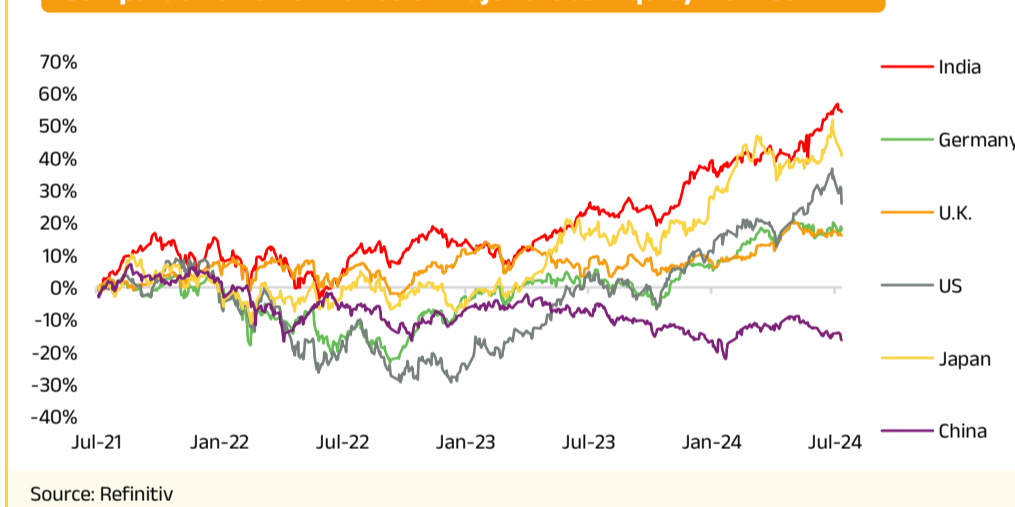
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

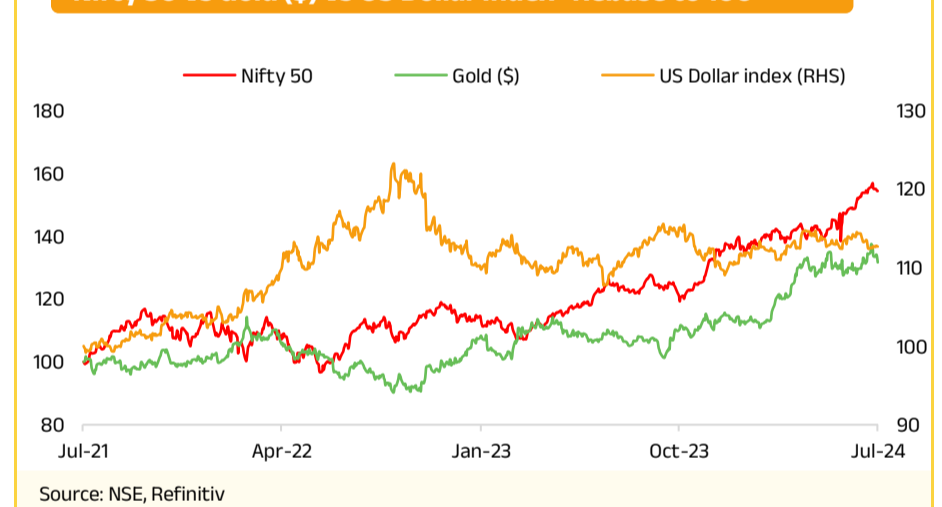
Commodity Prices	25-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	67,984	-1.36%	-8.04%	-5.02%
Gold (\$/oz)	2,364.50	-1.38%	-3.29%	1.96%
Silver (INR/1 kg)	81,496	-3.90%	-10.76%	-7.85%
Silver (\$/oz)	27.97	-3.52%	-8.90%	-3.27%
Brent Crude(\$/bbl)	84.17	-0.46%	-4.08%	-4.68%
Crude Oil (INR/1 bbl)	6,495.00	0.87%	-6.20%	-4.72%
NYMEX Crude(\$/bbl)	79.28	0.96%	-5.70%	-3.16%
Natural Gas (INR/1 mmbtu)	177.20	-3.17%	4.17%	-24.53%
Aluminium (INR/1 kg)	213.55	-1.23%	-5.49%	-8.09%
Copper (INR/1 kg)	790.50	-2.32%	-5.99%	-6.97%
Nickel (INR/1 kg)	1,327.50	-1.48%	-4.67%	-9.26%
Lead (INR/1 kg)	193.30	-0.21%	-1.73%	-0.62%
Zinc (INR/1 kg)	256.15	-3.07%	-5.32%	-3.79%
Mentha Oil (INR/1 kg)	969.70	-0.06%	0.00%	3.37%
Baltic Dry Index ^[1]	1,864	-0.27%	-2.51%	-3.22%

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



Alternative Investment Funds

Definition: Alternative Investment Funds (AIFs) can be defined as an investment vehicle established with the objective to pool in funds from Indian and foreign investors. The amount thus pooled would be invested in real estate, private equity and hedge funds in accordance with a pre-determined policy.



Explanation

AIFs can be classified into three categories on the basis of their effect on the economy. Category-I AIFs are those that have a beneficial effect on the Indian economy and as a result they may get concessions from the Government or regulator as the case may be. Venture funds and infrastructure funds come under the ambit of Category-I AIF. Category-II AIFs encompass private equity funds and debt funds that do not get any concessions from the Government. Such funds cannot raise debt for investment purposes, but may opt to do so to meet their day-to-day operational expenses. Category-III AIFs comprise Hedge Funds which are usually traded to generate short-term returns.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.80	18.44	33.24	17.22
Mid Cap Fund	1.81	25.22	51.06	24.09
Large & Mid Cap Fund	2.05	22.04	42.02	21.03
Small Cap Fund	2.71	20.89	47.18	24.96
Multi Cap Fund	2.31	20.98	44.14	22.18
Focused Fund	2.15	19.47	36.18	18.46
Value Fund	3.08	21.12	45.89	22.92
Contra Fund	2.95	23.15	47.18	24.95
ELSS	2.15	19.59	38.12	20.31
Equity Savings	1.25	8.13	15.37	9.56
Arbitrage Fund	0.54	3.67	7.59	5.53
Dividend Yield Fund	4.00	21.88	47.37	23.99
Aggressive Hybrid Fund	2.23	16.33	29.81	15.87
Balanced Advantage	2.01	11.94	23.78	12.58

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 24 Jul, 2024

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