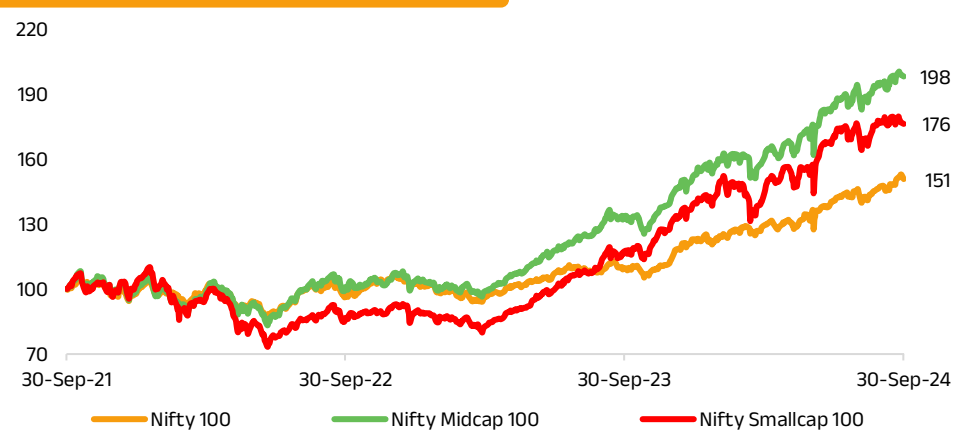


Broad Indices Historical Movement



Source: NSE

Broad Indices

	30-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,810.85	-1.41%	-0.49%	2.28%
Nifty 100	26,890.15	-1.33%	-0.50%	2.34%
Nifty 200	14,610.80	-1.18%	-0.56%	2.20%
Nifty 500	24,245.20	-1.00%	-0.55%	2.15%
Nifty Large Midcap 250	16,910.05	-0.78%	-0.49%	2.06%
Nifty Midcap 150	22,311.95	-0.22%	-0.50%	1.76%
Nifty Next 50	77,095.15	-0.92%	0.51%	2.41%
Nifty Smallcap 250	18,410.70	0.06%	-1.14%	1.32%

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

Smart Beta Index

Index	30-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,588.90	-1.38%	0.79%	1.31%
NIFTY 500 Value 50	15,537.35	0.16%	4.12%	0.69%
Nifty 200 Quality 30	23,336.15	-0.66%	-0.14%	2.32%
Nifty 50 Equal Weight	33,349.90	-0.97%	0.46%	2.71%
NIFTY Alpha Low Volatility 30	31,123.30	-1.21%	0.29%	2.64%
Nifty High Beta 50	4,145.47	-0.44%	0.85%	-0.44%
Nifty Low Volatility 50	26,377.43	-0.86%	-0.19%	2.93%
Nifty Midcap150 Momentum 50	67,046.95	-0.64%	-1.29%	0.95%
Nifty PSE	11,286.00	-0.16%	3.12%	-1.81%
Nifty SME Emerge	16,287.65	-0.08%	1.39%	2.05%
Nifty 100 ESG	5,182.25	-1.17%	-0.50%	2.03%

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

Sector Indices

Index	30-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	27,027.20	-2.11%	0.83%	3.26%
Nifty Bank	52,978.10	-1.59%	-2.08%	3.17%
Nifty Consumption	12,826.85	-1.32%	-1.20%	6.20%
Nifty Financial	24,480.30	-1.72%	-1.89%	3.56%
Nifty FMCG	65,540.35	-0.46%	-1.15%	3.93%
Nifty Healthcare	14,752.20	-0.88%	0.41%	1.69%
Nifty IT	41,946.05	-0.87%	-0.10%	-1.97%
Nifty Media	2,138.50	1.12%	2.92%	1.62%
Nifty Metal	10,198.35	1.33%	7.86%	8.43%
Nifty MNC	32,582.00	-0.47%	1.54%	5.19%
Nifty Pharma	23,281.20	-1.01%	0.64%	0.27%
Nifty Realty	1,099.00	-1.68%	-2.41%	4.33%
Nifty Energy	44,016.70	-1.19%	1.49%	0.59%

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

Nifty 50 Top 5 Gainers

Company	30-Sep-24	Prev_Day	% Change	1 Week
JSW Steel	1,030.05	1,001.55	2.85	4.88
NTPC	443.20	436.90	1.44	3.47
Hindalco	756.20	747.15	1.21	9.51
Britannia Industries Limited	6,338.15	6,268.80	1.11	2.04
BPCL	369.95	367.30	0.72	9.42

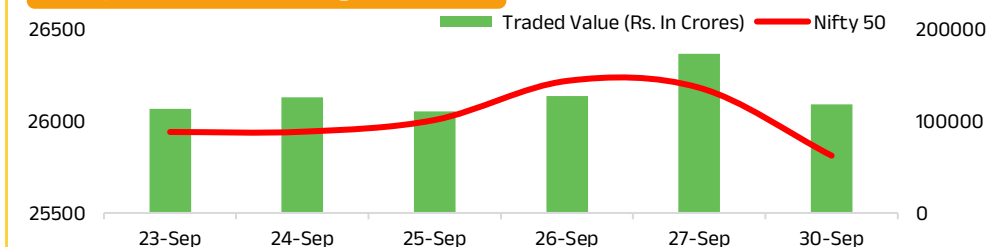
Source: NSE

Nifty 50 Top 5 Losers

Company	30-Sep-24	Prev_Day	% Change	1 Week
Hero Moto	5,712.40	5957	-4.11	-7.72
RIL	2,953.15	3052	-3.25	-1.13
Axis Bank	1,232.20	1273	-3.22	-1.17
M&M	3,094.90	3184	-2.79	1.48
ICICI Bank	1,273.00	1307	-2.57	-3.70

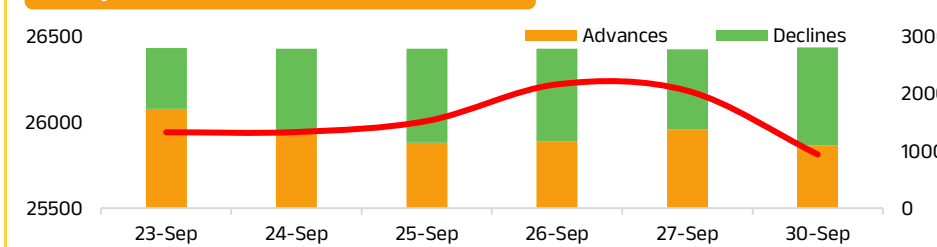
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

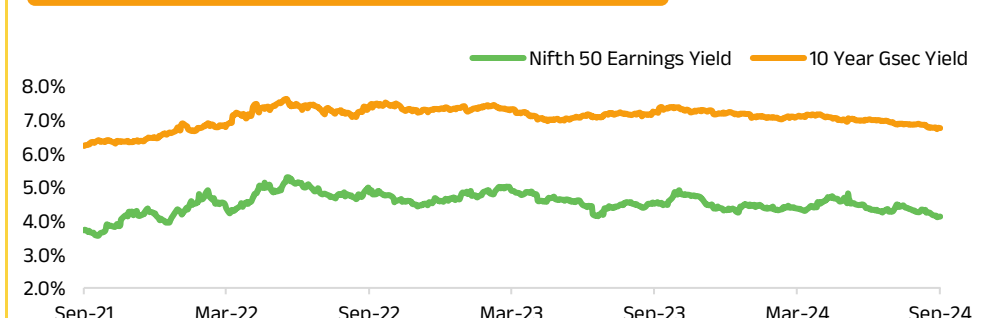
Indian equity markets fell despite metal stocks experiencing significant increases following China's announcement of various measures to boost its slowing economy over the weekend. A cautious undertone prevailed due to mixed global cues and signs of escalating geopolitical tensions involving Israel, Lebanon, and Iran.

Tata Power announced that it has signed a preliminary agreement with the government of Rajasthan to invest Rs. 1.2 trillion, which encompasses Rs. 75,000 crore dedicated to green energy initiatives within the state's power sector.

L&T Power Transmission & Distribution (PT&D) business, through its Digital Energy Solutions (DES) division, has secured a mandate to develop and implement advanced Energy Management Systems at various regional and state load dispatch centres in Southern India.

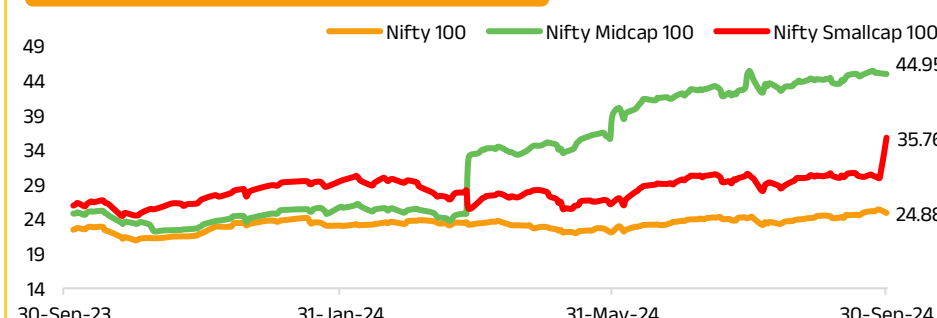
Dr Reddy's Laboratories (DRL) announced that its subsidiary in Switzerland has finalized the acquisition of Haleon plc's global consumer healthcare brands, excluding those in the United States, specifically in the nicotine replacement therapy (NRT) sector. The Hyderabad-based pharmaceutical company stated in a regulatory filing.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



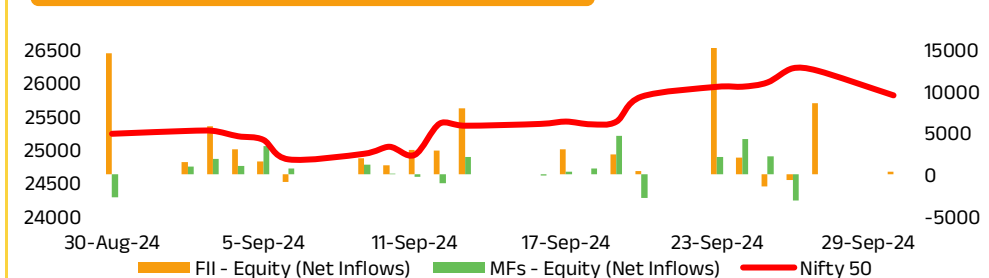
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	364.16	57,724	97,409	100,609
MF**	-3142.95	18,287	70,573	261,999
DII	6645.8	31,860	103,625	339,752

Source: SEBI, NSDL;**As on 26th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25990.20	26345.20	-1.35%
Near Basis	179.30	166.20	7.88%
Mid Futures	26123.80	26459.20	-1.27%
Mid Basis	312.95	280.20	11.69%
Near Open Interest (Cr.)	1.49	1.63	-8.49%
Mid Open Interest (Cr.)	0.11	0.12	-6.44%
Rollover (%)	7.92	7.37	7.55%
Put Call Ratio (OI)	0.84	1.16	-27.92%
Put Call Ratio(Vol)	1.11	0.92	21.16%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	5071	3343	38694
Index Options	1766984	1763420	476005
Stock Futures	41356	37677	348713
Stock Options	49694	48730	27006
Total	1863104	1853170	890418

Source: NSE

Global Equity Market

Global Indices	30-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3145.06	0.38%	0.70%	2.02%
Nasdaq 100 (U.S.)	20060.69	0.26%	1.05%	2.48%
FTSE (U.K.)	8236.95	-1.01%	-0.28%	-1.67%
DAX Index (Germany)	19324.93	-0.76%	2.54%	2.21%
CAC 40 Index (France)	7635.75	-2.00%	1.70%	0.06%
SSE Composite (China)	3336.50	8.06%	21.37%	17.39%
Nikkei (Japan)	37919.55	-4.80%	0.52%	-1.88%
Kospi (South Korea)	2593.27	-2.13%	-0.34%	-3.03%
HangSeng (Hong Kong)	21133.68	2.43%	15.82%	17.48%
Strait Times (Singapore)	3585.29	0.33%	-1.46%	4.13%
Ibovespa Sao Paulo (Brazil)	131816.44	-0.69%	0.96%	-3.08%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8269.80	0.70%	1.43%	2.20%
Jakarta Composite (Indonesia)	7527.93	-2.20%	-3.19%	-1.86%
KLSE (Malaysia)	1648.91	-0.67%	-0.98%	-1.78%

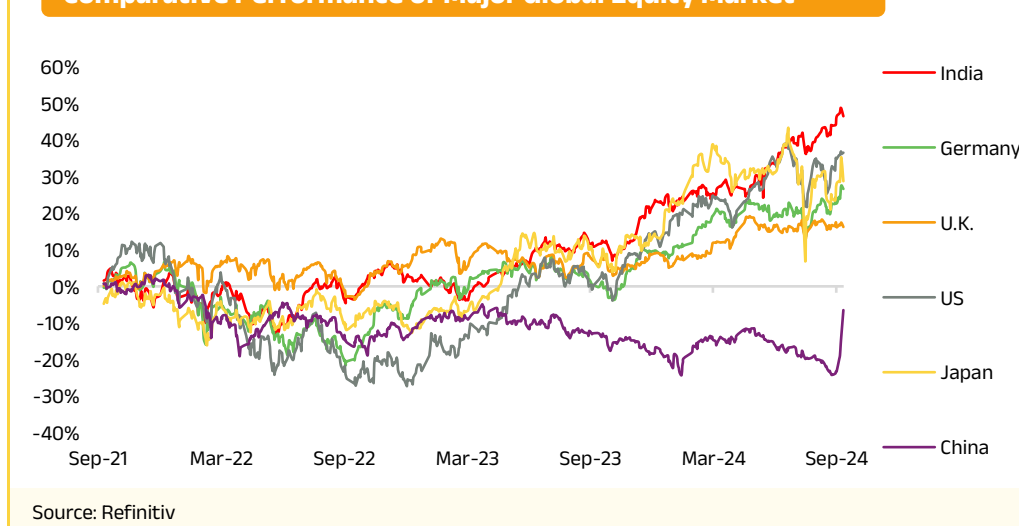
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

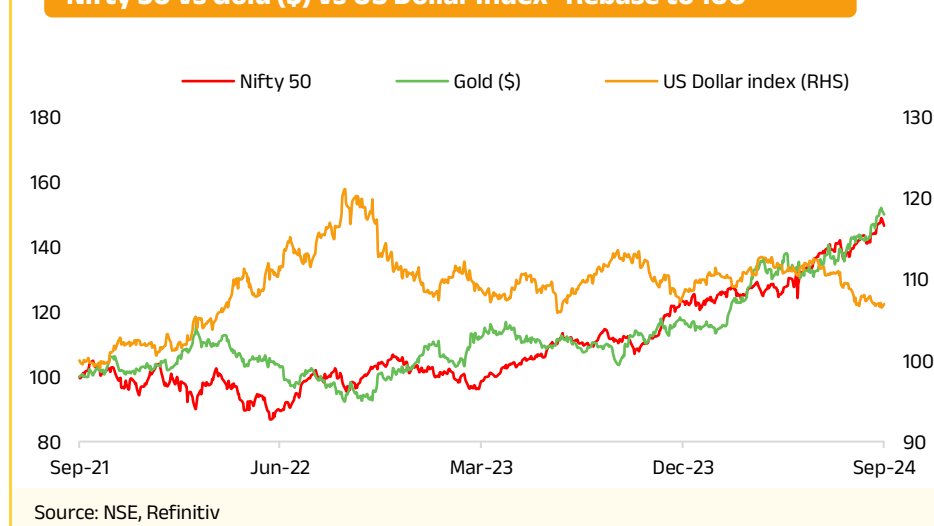
Commodity Prices	30-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	75,051	-0.38%	1.21%	4.70%
Gold (\$/oz)	2,634.49	-0.88%	0.23%	5.25%
Silver (INR/1 kg)	89,537	-1.55%	2.31%	5.45%
Silver (\$/oz)	31.15	-1.49%	1.57%	7.99%
Brent Crude(\$/bbl)	72.99	0.58%	-4.23%	-11.46%
Crude Oil (INR/1 bbl)	5,705.00	0.72%	-3.76%	-10.41%
NYMEX Crude(\$/bbl)	68.65	0.04%	-3.62%	-7.75%
Natural Gas (INR/1 mmbtu)	242.80	5.38%	19.49%	35.42%
Aluminium (INR/1 kg)	238.20	-0.33%	4.04%	3.77%
Copper (INR/1 kg)	857.85	-0.08%	5.39%	5.91%
Nickel (INR/1 kg)	1,438.00	1.86%	3.68%	0.47%
Lead (INR/1 kg)	196.70	2.53%	0.28%	-1.08%
Zinc (INR/1 kg)	285.45	0.60%	5.88%	3.80%
Mentha Oil (INR/1 kg)	986.90	1.03%	0.25%	-1.57%
Baltic Dry Index ^[1]	2,110	0.91%	5.55%	16.32%

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	2.01	18.02	38.01	15.83
Mid Cap Fund	2.21	28.24	50.11	23.96
Large & Mid Cap Fund	2.08	23.59	45.32	20.37
Small Cap Fund	2.09	28.85	46.15	24.81
Multi Cap Fund	2.02	24.18	45.12	21.45
Focused Fund	2.15	21.37	41.41	17.81
Value Fund	1.29	22.00	47.00	22.38
Contra Fund	2.04	24.53	50.12	24.58
ELSS	1.71	21.94	40.92	19.63
Equity Savings	1.04	8.55	16.40	9.33
Arbitrage Fund	0.48	3.50	7.16	5.75
Dividend Yield Fund	1.45	23.07	48.21	22.99
Aggressive Hybrid Fund	1.63	17.10	33.00	15.31
Balanced Advantage	1.19	12.25	25.55	12.61

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 27 Sep, 2024

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