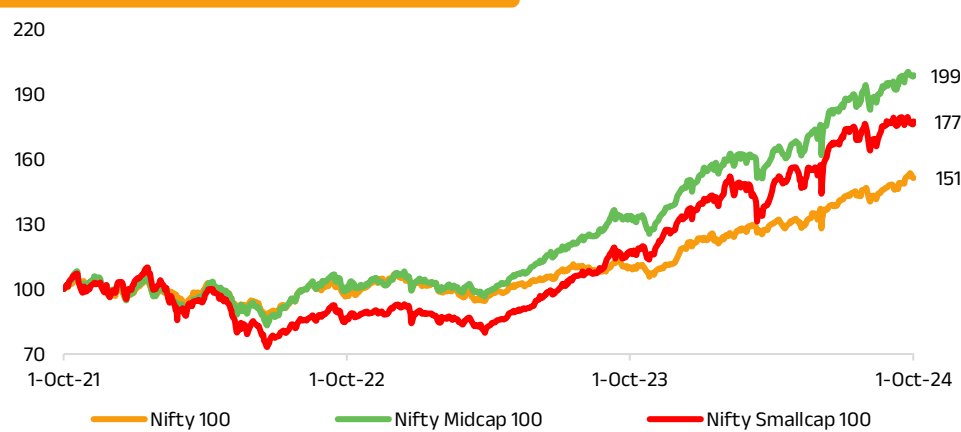


Broad Indices Historical Movement



Source: NSE

Broad Indices

	1-Oct-24	1 Day	1 Week	1 Month
Nifty 50	25,796.90	-0.05%	-0.80%	2.05%
Nifty 100	26,885.25	-0.02%	-0.62%	2.09%
Nifty 200	14,616.80	0.04%	-0.54%	2.09%
Nifty 500	24,271.30	0.11%	-0.41%	2.15%
Nifty Large Midcap 250	16,934.30	0.14%	-0.25%	2.23%
Nifty Midcap 150	22,379.75	0.30%	0.10%	2.36%
Nifty Next 50	77,284.45	0.25%	1.00%	2.59%
Nifty Smallcap 250	18,531.80	0.66%	0.07%	2.06%

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

Smart Beta Index

Index	1-Oct-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,735.85	0.39%	0.68%	2.39%
NIFTY 500 Value 50	15,556.79	0.13%	2.68%	1.15%
Nifty 200 Quality 30	23,375.90	0.17%	0.58%	2.03%
Nifty 50 Equal Weight	33,336.30	-0.04%	0.40%	2.43%
NIFTY Alpha Low Volatility 30	31,115.00	-0.03%	0.10%	2.68%
Nifty High Beta 50	4,151.41	0.14%	0.88%	-0.30%
Nifty Low Volatility 50	26,371.36	-0.02%	0.01%	2.59%
Nifty Midcap150 Momentum 50	67,311.25	0.39%	-0.56%	2.17%
Nifty PSE	11,240.80	-0.40%	1.15%	-1.59%
Nifty SME Emerge	16,410.51	0.75%	0.80%	2.08%
Nifty 100 ESG	5,184.90	0.05%	-0.24%	1.76%

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

Sector Indices

Index	1-Oct-24	1 Day	1 Week	1 Month
Nifty Auto	27,083.45	0.21%	0.73%	3.88%
Nifty Bank	52,922.60	-0.10%	-2.18%	2.88%
Nifty Consumption	12,811.60	-0.12%	-0.61%	5.86%
Nifty Financial	24,477.45	-0.01%	-2.04%	3.16%
Nifty FMCG	65,470.95	-0.11%	-0.08%	2.98%
Nifty Healthcare	14,741.60	-0.07%	0.46%	2.35%
Nifty IT	42,434.80	1.17%	1.13%	-1.26%
Nifty Media	2,172.75	1.60%	1.57%	3.73%
Nifty Metal	10,222.95	0.24%	4.56%	9.84%
Nifty MNC	32,761.40	0.55%	1.85%	5.98%
Nifty Pharma	23,296.55	0.07%	0.20%	1.34%
Nifty Realty	1,096.85	-0.20%	-2.95%	4.37%
Nifty Energy	43,688.75	-0.75%	-0.85%	-0.22%

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

Nifty 50 Top 5 Gainers

Company	1-Oct-24	Prev_Day	% Change	1 Week
Tech Mahindra	1,625.40	1,577.20	3.06	1.41
M&M	3,165.50	3,094.90	2.28	2.41
Britannia Industries Limited	6,446.05	6,338.15	1.70	4.30
Infosys	1,904.35	1,875.60	1.53	0.48
Kotak Bank	1,879.40	1,853.95	1.37	-0.98

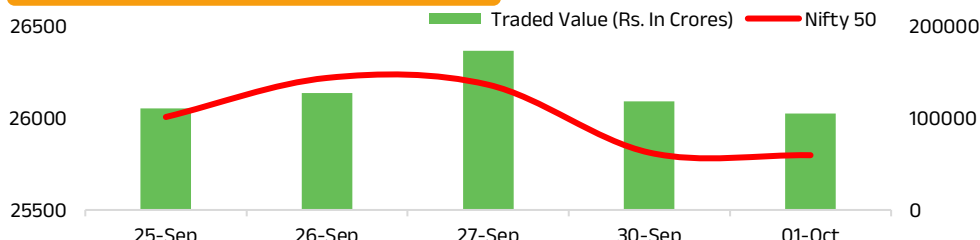
Source: NSE

Nifty 50 Top 5 Losers

Company	1-Oct-24	Prev_Day	% Change	1 Week
IndusInd Bank	1,409.70	1448	-2.62	-2.07
ONGC	291.95	298	-1.90	-2.26
Asian Paints	3,277.35	3329	-1.55	1.00
Bajaj Auto	12,157.45	12346	-1.53	-1.93
Titan Industries Limited	3,775.95	3824	-1.26	1.04

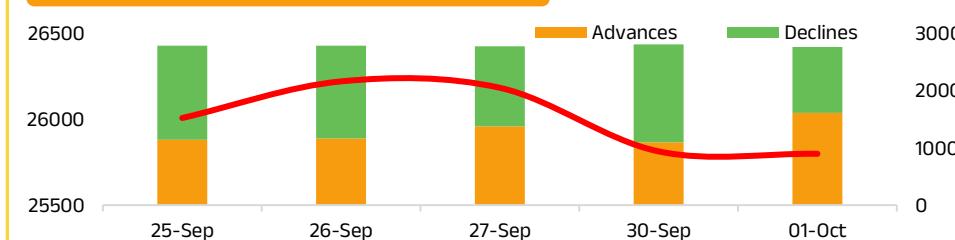
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

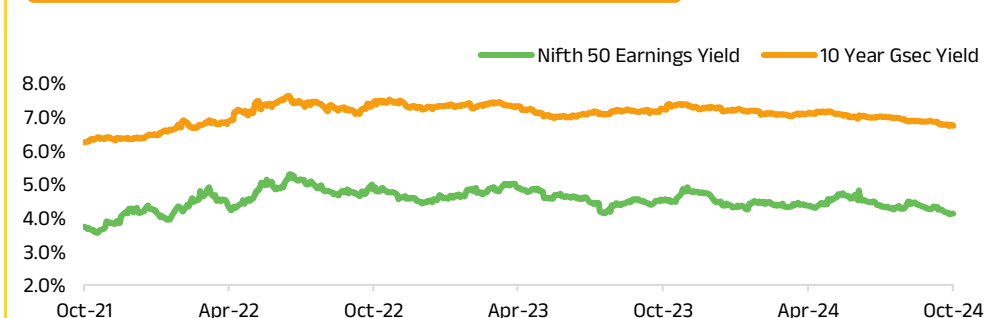
Indian equity markets closed on a flat note amid mixed global cues. The key benchmark indices swung between gains and losses before ending marginally lower as investors awaited for the upcoming RBI's policy meeting and Q2 FY25 corporate results to have further insights on market trajectory.

Adani Power announced that it has signed a business transfer agreement concerning Dahanu Power, with a cash payment of Rs. 815 crore. Adani Power indicated that the agreement was made with North Maharashtra Power (NMPL), a company affiliated with it, for the acquisition of the 500-megawatt (MW) Adani Dahanu Thermal Power Station (ADTPS) situated in Dahanu.

Sun Pharmaceutical Industries announced that it has entered into a global licensing agreement with the Italian-Swiss company Philogen for an anti-cancer medication. Under the terms of this agreement, Sun Pharma will possess the exclusive rights to commercialize Fibromun, a specialized product developed by Philogen.

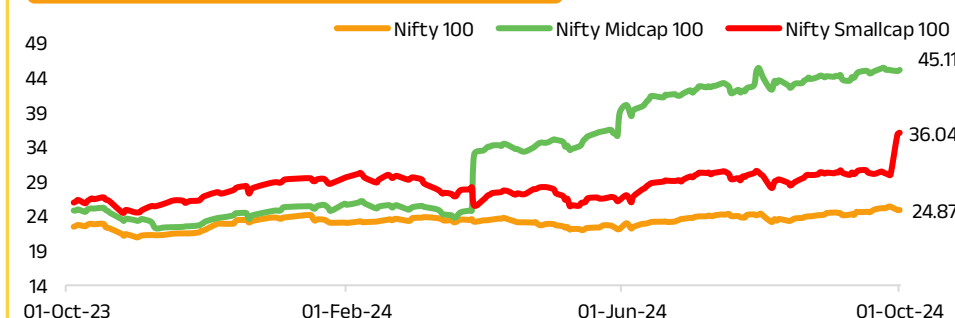
NTPC has announced that it has started operations for 50 MW of the 220 MW Shajapur Solar Project in Madhya Pradesh. Additionally, the company has also begun operations for 98.78 MW of the 300 MW Shambu ki Burj-2 Solar PV Project in Bikaner, Rajasthan, according to a filing with the exchange.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



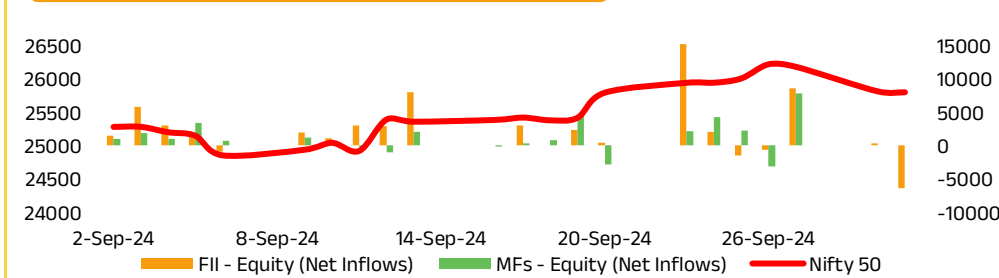
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	INR Cr.
				YTD
FII*	-6426.84	-6,427	-6,427	94,182
MF**	7786.11			269,785
DII*	4609.55	4,610	4,610	344,361

Source: SEBI, NSDL; *As on 1st Oct 2024; **As on 27th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25969.30	25969.30	0.00%
Near Basis	172.35	172.35	0.00%
Mid Futures	26098.50	26098.50	0.00%
Mid Basis	301.60	301.60	0.00%
Near Open Interest (Cr.)	1.45	1.45	0.00%
Mid Open Interest (Cr.)	0.11	0.11	0.00%
Rollover (%)	8.47	8.47	0.00%
Put Call Ratio (OI)	0.83	0.84	-1.38%
Put Call Ratio(Vol)	0.91	1.11	-18.06%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2800	4502	36473
Index Options	2502912	2513489	579289
Stock Futures	29066	37886	349993
Stock Options	37021	36446	33198
Total	2571799	2592323	998952

Source: NSE

Global Equity Market

Global Indices	2-Oct-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3116.91	0.02%	-0.20%	1.11%
Nasdaq 100 (U.S.)	19802.58	0.15%	-0.85%	1.16%
FTSE (U.K.)	8290.86	0.17%	0.27%	-0.87%
DAX Index (Germany)	19164.75	-0.25%	1.30%	1.24%
CAC 40 Index (France)	7577.59	0.05%	0.16%	-0.90%
SSE Composite (China) ^[2]	3336.50	8.06%	15.20%	18.69%
Nikkei (Japan)	37808.76	-2.18%	-0.16%	-2.31%
Kospi (South Korea)	2561.69	-1.22%	-1.33%	-4.45%
HangSeng (Hong Kong)	22443.73	6.20%	17.33%	26.86%
Strait Times (Singapore)	3584.67	0.10%	0.04%	3.51%
Ibovespa Sao Paulo (Brazil)	133514.94	0.77%	1.47%	-1.03%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8198.20	-0.13%	0.88%	1.09%
Jakarta Composite (Indonesia)	7563.26	-1.03%	-2.29%	-1.71%
KLSE (Malaysia)	1639.31	-1.03%	-2.04%	-2.32%

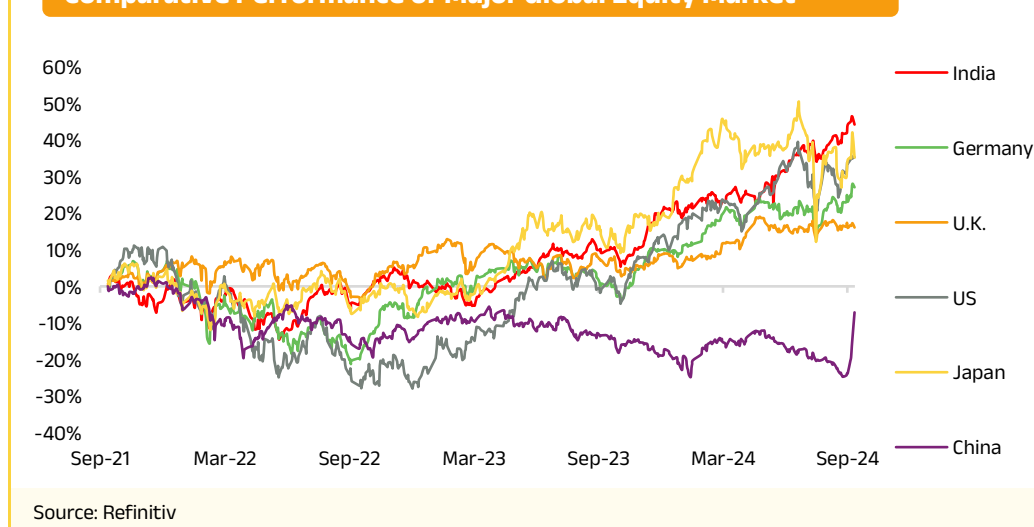
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

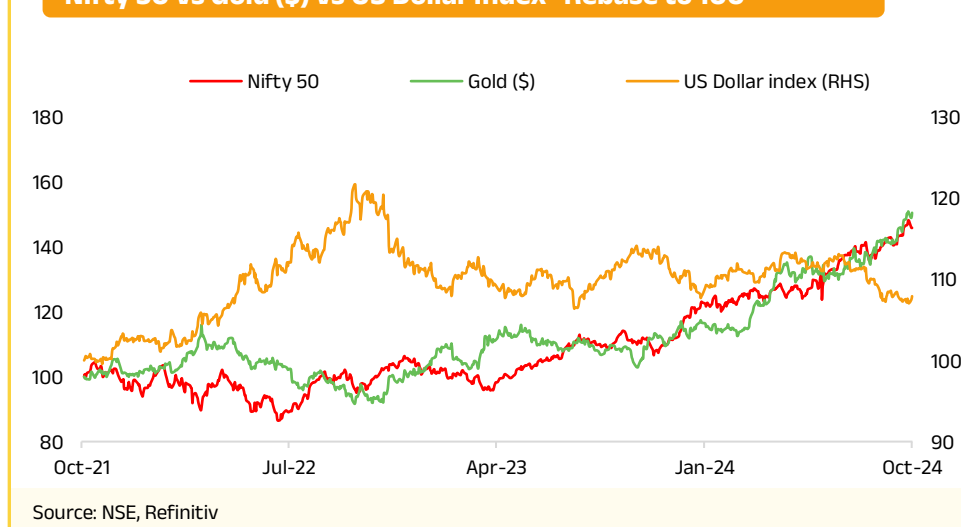
Commodity Prices	2-Oct-24	1 Day	1 Week	1 Month
Gold (INR/10 gm) ^[1]	75,213	0.22%	0.25%	5.55%
Gold (\$/oz)	2,657.75	-0.19%	0.04%	6.34%
Silver (INR/1 kg) ^[1]	89,981	0.50%	-0.56%	8.63%
Silver (\$/oz)	31.86	1.45%	0.06%	11.81%
Brent Crude(\$/bbl)	75.50	-0.55%	-1.51%	-5.70%
Crude Oil (INR/1 bbl) ^[1]	5,712.00	0.12%	-4.56%	-7.41%
NYMEX Crude(\$/bbl)	70.64	0.47%	0.67%	-5.08%
Natural Gas (INR/1 mmbtu) ^[1]	244.90	0.86%	14.81%	37.28%
Aluminium (INR/1 kg) ^[1]	238.00	-0.08%	1.93%	5.92%
Copper (INR/1 kg) ^[1]	851.50	-0.74%	1.37%	6.12%
Nickel (INR/1 kg) ^[1]	1,476.20	2.66%	5.13%	4.70%
Lead (INR/1 kg) ^[1]	191.35	-2.72%	-2.37%	1.78%
Zinc (INR/1 kg) ^[1]	285.00	-0.16%	3.07%	6.34%
Mentha Oil (INR/1 kg) ^[1]	978.30	-0.87%	-0.34%	-2.86%
Baltic Dry Index ^[1]	2,030	-2.59%	0.69%	5.78%

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



Value and Growth Fund

Definition: Growth and value are the two most common investment strategies. These two styles of investment have different set of characteristics that make either, or both suitable for investors based on the investment objective of the investor. During different economic conditions, either of these strategies can dominate.



Explanation

A basic principal behind value investing is that markets are inefficient and investors can benefit from this anomaly. In other words, value investing is about finding stocks that the market has not correctly priced. It involves buying a stock on the basis of its fundamentals which include earning growth, cash flow, dividend yield, book value and replacement cost. If the company's fundamentals are strong but the stock's price is below its obvious value, then there arises a value investing opportunity. On the other hand, growth investing targets stocks which have above average earning growth rate, above average sales growth rate and low dividend yield.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.03	17.01	37.91	15.99
Mid Cap Fund	2.66	25.40	50.37	24.11
Large & Mid Cap Fund	2.29	21.58	45.24	20.49
Small Cap Fund	2.84	25.98	46.74	24.94
Multi Cap Fund	2.38	22.05	45.27	21.57
Focused Fund	2.45	19.92	41.46	17.92
Value Fund	1.43	19.92	46.92	22.47
Contra Fund	2.17	22.37	49.82	24.63
ELSS	2.01	20.24	41.15	19.79
Equity Savings	1.02	8.15	16.37	9.38
Arbitrage Fund	0.34	3.42	7.11	5.73
Dividend Yield Fund	1.53	20.96	48.00	23.08
Aggressive Hybrid Fund	1.77	16.00	32.99	15.42
Balanced Advantage	1.32	11.52	25.57	12.68

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 01 Oct, 2024; ^[2]Data as on 30 Sep, 2024

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