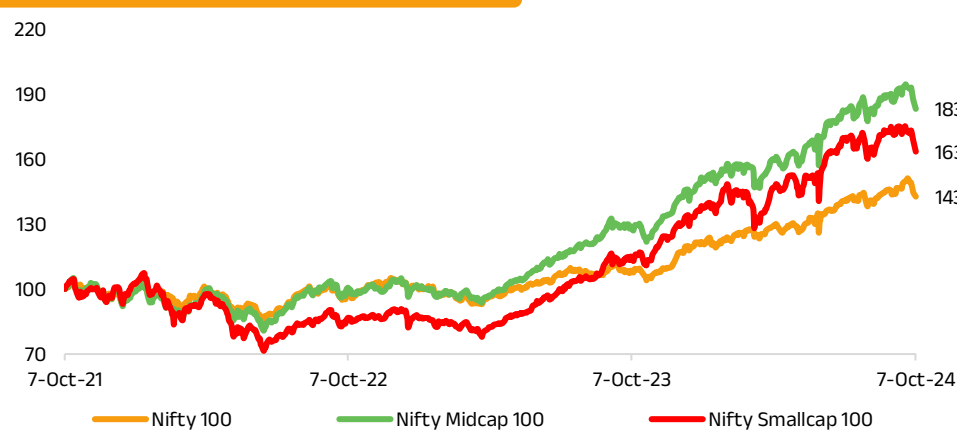


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	7-Oct-24	1 Day	1 Week	1 Month
Nifty 50	24,795.75	-0.87%	-3.93%	-0.23%
Nifty 100	25,749.65	-1.18%	-4.24%	-0.69%
Nifty 200	13,978.90	-1.31%	-4.32%	-0.91%
Nifty 500	23,181.95	-1.50%	-4.39%	-1.26%
Nifty Large Midcap 250	16,154.40	-1.62%	-4.47%	-1.29%
Nifty Midcap 150	21,264.50	-2.05%	-4.69%	-1.90%
Nifty Next 50	72,884.30	-2.33%	-5.46%	-2.12%
Nifty Smallcap 250	17,514.50	-2.81%	-4.87%	-4.33%

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

## Smart Beta Index

Index	7-Oct-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,707.55	-1.92%	-5.01%	-0.69%
NIFTY 500 Value 50	14,726.98	-2.91%	-5.22%	-1.61%
Nifty 200 Quality 30	22,548.50	-0.61%	-3.38%	-0.86%
Nifty 50 Equal Weight	32,001.35	-1.05%	-4.04%	-0.25%
NIFTY Alpha Low Volatility 30	29,913.25	-1.12%	-3.89%	0.04%
Nifty High Beta 50	3,867.95	-3.52%	-6.69%	-4.24%
Nifty Low Volatility 50	25,377.27	-0.89%	-3.79%	-0.93%
Nifty Midcap150 Momentum 50	64,050.85	-2.35%	-4.47%	-0.71%
Nifty PSE	10,507.25	-3.22%	-6.90%	-4.96%
Nifty SME Emerge	15,519.73	-3.98%	-4.71%	-5.04%
Nifty 100 ESG	4,977.30	-1.07%	-3.95%	-1.10%

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

## Sector Indices

Index	7-Oct-24	1 Day	1 Week	1 Month
Nifty Auto	25,807.15	-0.46%	-4.51%	1.10%
Nifty Bank	50,478.90	-1.91%	-4.72%	-0.19%
Nifty Consumption	12,258.80	-0.75%	-4.43%	1.61%
Nifty Financial	23,221.10	-1.70%	-5.14%	-1.31%
Nifty FMCG	63,028.35	-0.55%	-3.83%	-0.23%
Nifty Healthcare	14,450.35	-0.50%	-2.05%	0.00%
Nifty IT	42,190.60	0.66%	0.58%	-0.09%
Nifty Media	1,995.30	-3.65%	-6.70%	-3.14%
Nifty Metal	9,886.30	-2.24%	-3.06%	7.92%
Nifty MNC	31,157.95	-1.41%	-4.37%	1.46%
Nifty Pharma	22,977.80	-0.51%	-1.30%	-0.28%
Nifty Realty	1,020.15	-1.13%	-7.17%	-1.16%
Nifty Energy	41,039.35	-2.47%	-6.76%	-2.78%

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

## Nifty 50 Top 5 Gainers

Company	7-Oct-24	Prev_Day	% Change	1 Week
M&M	3,060.20	3,017.45	1.42	-1.12
ITC	510.20	503.55	1.32	-1.53
Bharti Airtel	1,662.05	1,640.90	1.29	-2.78
Infosys	1,934.30	1,918.15	0.84	3.13
Bajaj Finance	7,269.40	7,211.35	0.81	-5.63

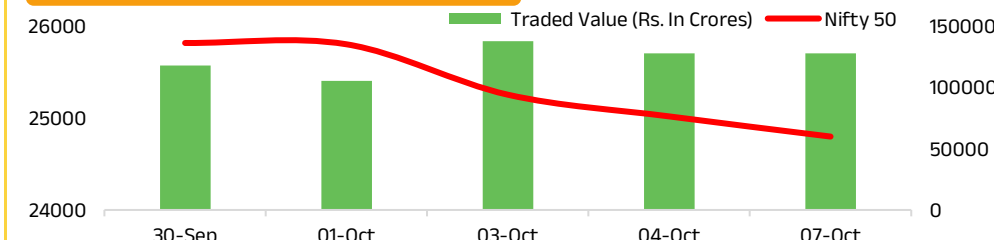
Source: NSE

## Nifty 50 Top 5 Losers

Company	7-Oct-24	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,355.20	1414	-4.14	-6.42
Indian Oil	162.74	169	-3.50	-9.66
NTPC	415.45	430	-3.48	-6.26
Coal India	480.45	497	-3.37	-5.82
SBI	770.65	797	-3.26	-2.19

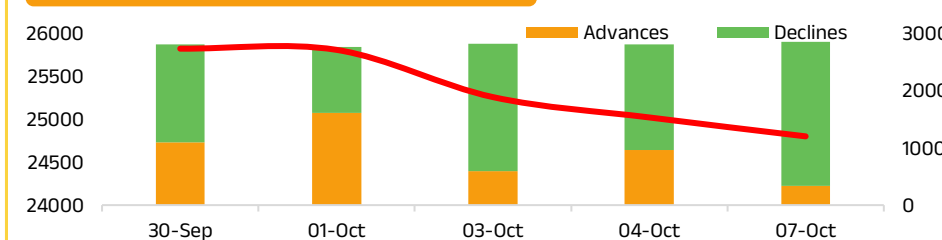
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

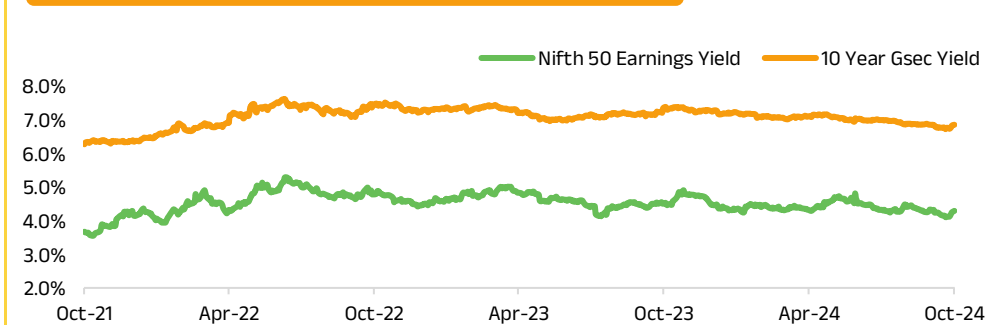
Indian equity markets gave up early gains to conclude significantly in the negative due to persistent challenges in the Middle East and ongoing FII outflows. Furthermore, market sentiment was affected by escalating tensions in the Middle East due to the Israel-Iran conflict, leading to a decrease in oil stocks in India.

Kalyan Jewellers announced a 37% YoY rise in consolidated revenue for the Q2 of FY25, attributed to a 39% increase in revenue from India and a 24% increase from the Middle East. The company inaugurated 26 new showrooms, raising the total number to 303, and experienced a 30% growth in its digital platform.

Steel Authority of India Limited (SAIL) and BHP have signed a Memorandum of Understanding (MoU) to investigate ways to reduce carbon emissions at SAIL's steel plants. Their goal is to evaluate different reducing agents such as hydrogen and biochar, develop local research and development skills, and tackle greenhouse gas emissions in the steel sector.

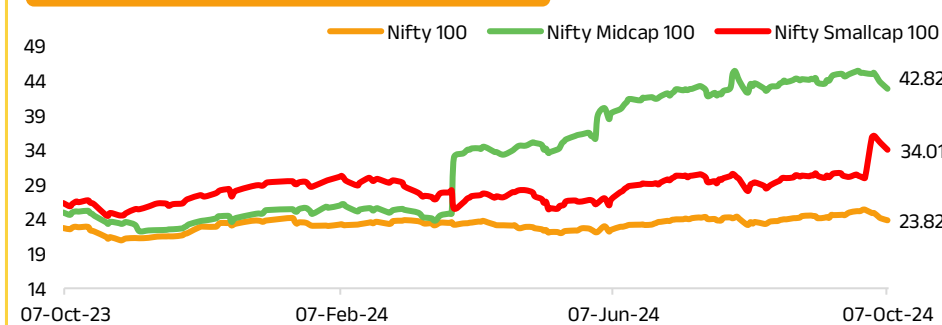
Adani group has started blending green hydrogen with natural gas used for cooking in some areas of Ahmedabad. This effort aims to reduce emissions and achieve net-zero goals. Adani Total Gas Ltd, the group's partnership with French company TotalEnergies, is now adding 2.2%-2.3% of green hydrogen to the natural gas supplied in Shantigram, Ahmedabad.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



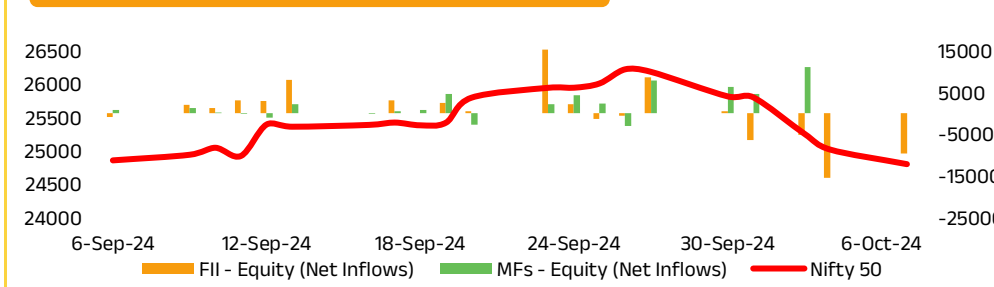
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	-9645.1	-36,787	-36,787	63,822
MF**	11053.19	15,603	15,603	291,579
DII	13245.12	39,674	39,674	379,426

Source: SEBI, NSDL,\*\*As on 3rd Oct 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	24985.50	25173.80	-0.75%
Near Basis	189.80	159.25	19.18%
Mid Futures	25126.80	25327.20	-0.79%
Mid Basis	331.10	312.60	5.92%
Near Open Interest (Cr.)	1.38	1.38	0.29%
Mid Open Interest (Cr.)	0.13	0.12	9.18%
Rollover (%)	11.48	10.68	7.41%
Put Call Ratio (OI)	0.67	0.69	-1.93%
Put Call Ratio(Vol)	0.98	0.87	12.84%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4801	10086	34432
Index Options	2335000	2291935	484054
Stock Futures	32678	35430	336550
Stock Options	52216	59911	54821
Total	2424694	2397361	909857

Source: NSE

## Global Equity Market

Global Indices	7-Oct-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3110.51	-0.95%	-1.10%	5.44%
Nasdaq 100 (U.S.)	19800.74	-1.17%	-1.30%	7.49%
FTSE (U.K.)	8303.62	0.28%	0.81%	1.49%
DAX Index (Germany)	19104.10	-0.09%	-1.14%	4.38%
CAC 40 Index (France)	7576.02	0.46%	-0.78%	3.04%
SSE Composite (China)	NA	NA	NA	NA
Nikkei (Japan)	39332.74	1.80%	3.73%	8.08%
Kospi (South Korea)	2610.38	1.58%	0.66%	2.60%
HangSeng (Hong Kong)	23099.78	1.60%	9.30%	32.42%
Strait Times (Singapore)	3599.19	0.28%	0.39%	4.19%
Ibovespa Sao Paulo (Brazil)	132017.84	0.17%	0.15%	-1.90%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8205.40	0.68%	-0.78%	2.40%
Jakarta Composite (Indonesia)	7504.14	0.11%	-0.32%	-2.82%
KLSE (Malaysia)	1635.29	0.33%	-0.83%	-1.08%

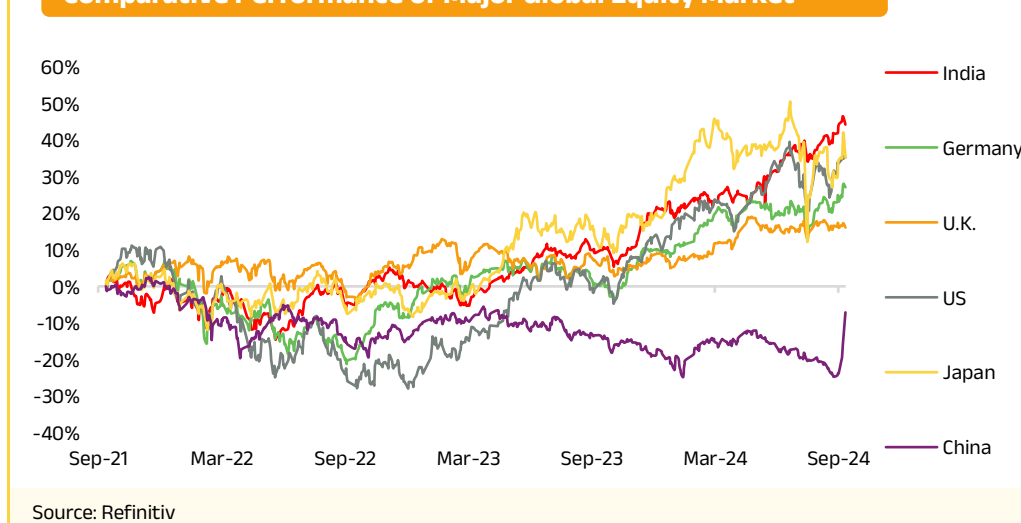
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

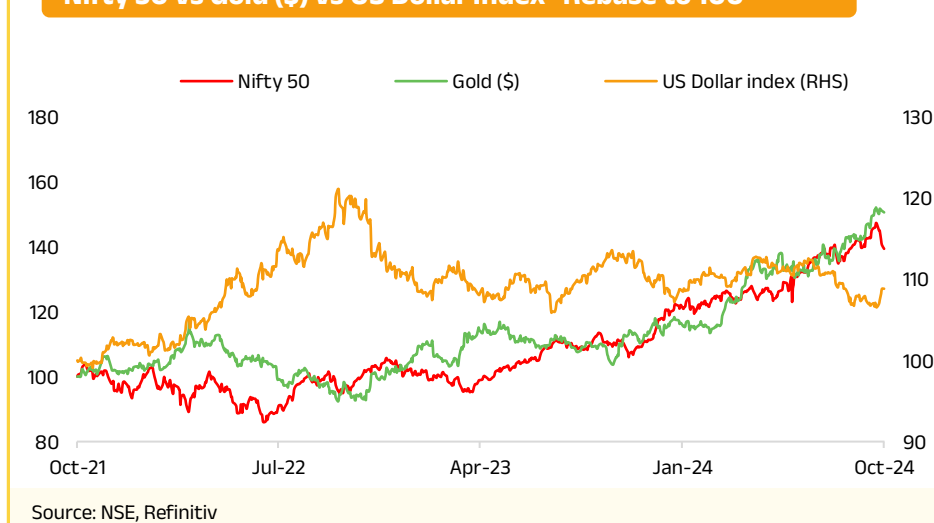
Commodity Prices	7-Oct-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	75,656	-0.05%	0.81%	5.66%
Gold (\$/oz)	2,643.58	-0.33%	0.34%	5.87%
Silver (INR/1 kg)	91,760	-0.32%	2.48%	10.36%
Silver (\$/oz)	31.72	-1.40%	1.83%	13.61%
Brent Crude(\$/bbl)	82.38	3.04%	12.86%	9.75%
Crude Oil (INR/1 bbl)	6,245.00	0.92%	9.47%	7.54%
NYMEX Crude(\$/bbl)	77.66	3.78%	13.12%	13.41%
Natural Gas (INR/1 mmbtu)	239.60	-3.89%	-1.32%	26.57%
Aluminium (INR/1 kg)	242.70	-0.27%	1.89%	9.25%
Copper (INR/1 kg)	854.50	-0.09%	-0.39%	8.04%
Nickel (INR/1 kg)	1,516.50	0.54%	5.46%	11.57%
Lead (INR/1 kg)	192.40	-2.09%	-2.19%	-0.57%
Zinc (INR/1 kg)	292.25	0.50%	2.38%	11.06%
Mentha Oil (INR/1 kg)	971.50	0.42%	-1.56%	-2.63%
Baltic Dry Index <sup>[1]</sup>	1,928	-0.67%	-7.49%	-0.67%

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



### Securities Transaction Tax

Definition: Securities Transaction Tax (STT) refers to the tax levied on transaction (purchase or sale) of securities listed on the Indian stock exchange. Such securities include equity shares, derivatives and equity-oriented mutual fund units. The rate is specified by the Central Government from time to time.



### Explanation

STT is levied at the rate of 0.100% on purchase or sale of equity shares in a company, where such contract is settled by the actual delivery or transfer of such share or unit. However, for sale of a unit of an equity-oriented fund, where such contract is settled by the actual delivery or transfer of such share or unit, the rate has been revised to 0.001% with effect from June 1, 2013. The same shall be borne by the seller. Meanwhile, the rate of STT is 0.025% for sale of equity shares or a unit of equity-oriented fund, where such contract is settled other than by the actual delivery or transfer of such share or unit.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-1.00	11.62	32.47	13.79
Mid Cap Fund	-1.86	18.32	43.91	21.02
Large & Mid Cap Fund	-1.38	15.46	39.50	17.83
Small Cap Fund	-2.79	18.02	38.74	21.78
Multi Cap Fund	-1.71	15.45	38.76	19.45
Focused Fund	-1.15	14.13	35.70	15.52
Value Fund	-1.90	13.97	41.15	19.99
Contra Fund	-0.73	16.98	45.12	22.47
ELSS	-1.70	14.12	35.11	17.31
Equity Savings	-0.01	6.45	15.02	8.73
Arbitrage Fund	0.32	3.28	7.09	5.77
Dividend Yield Fund	-0.93	15.54	42.93	20.80
Aggressive Hybrid Fund	-0.87	11.55	28.80	13.62
Balanced Advantage	-0.45	8.63	23.08	11.58

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.

<sup>[1]</sup>Data as on 04 Oct, 2024

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