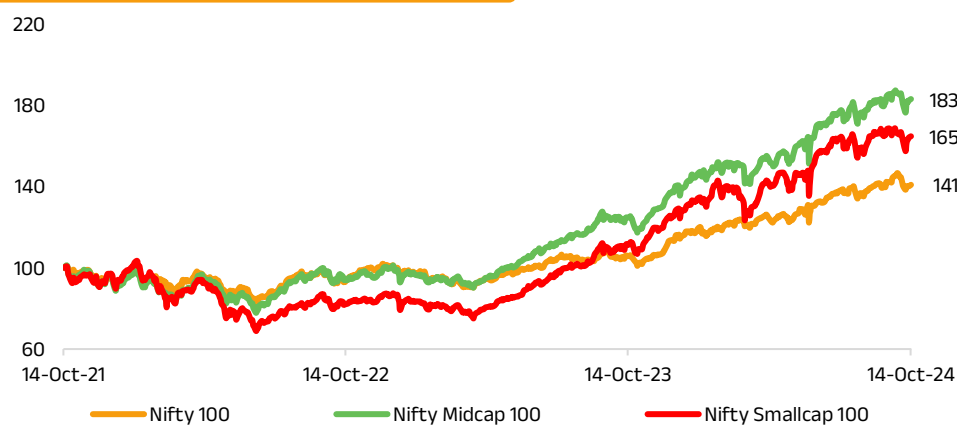


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	14-Oct-24	1 Day	1 Week	1 Month
Nifty 50	25,127.95	0.66%	1.34%	-0.90%
Nifty 100	26,197.90	0.55%	1.74%	-0.84%
Nifty 200	14,269.35	0.53%	2.08%	-0.85%
Nifty 500	23,727.05	0.49%	2.35%	-0.84%
Nifty Large Midcap 250	16,596.90	0.46%	2.74%	-0.71%
Nifty Midcap 150	22,058.80	0.36%	3.74%	-0.59%
Nifty Next 50	75,651.70	0.36%	3.80%	0.30%
Nifty Smallcap 250	18,265.10	0.29%	4.29%	-1.50%

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

## Smart Beta Index

Index	14-Oct-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,526.15	0.48%	5.09%	2.96%
NIFTY 500 Value 50	15,015.66	0.25%	1.96%	0.61%
Nifty 200 Quality 30	22,951.85	0.39%	1.79%	-1.80%
Nifty 50 Equal Weight	32,423.35	0.44%	1.32%	-0.80%
NIFTY Alpha Low Volatility 30	30,200.95	0.09%	0.96%	-0.63%
Nifty High Beta 50	3,973.04	0.03%	2.72%	-3.09%
Nifty Low Volatility 50	25,634.49	0.31%	1.01%	-1.68%
Nifty Midcap150 Momentum 50	67,533.90	1.01%	5.44%	2.35%
Nifty PSE	10,860.10	0.36%	3.36%	-0.49%
Nifty SME Emerge	16,181.64	0.44%	4.26%	-1.45%
Nifty 100 ESG	5,068.90	0.55%	1.84%	-1.15%

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

## Sector Indices

Index	14-Oct-24	1 Day	1 Week	1 Month
Nifty Auto	26,463.55	0.10%	2.54%	2.49%
Nifty Bank	51,816.90	1.26%	2.65%	-0.23%
Nifty Consumption	12,439.75	0.13%	1.48%	-0.10%
Nifty Financial	23,857.55	1.04%	2.74%	-0.51%
Nifty FMCG	62,372.30	0.47%	-1.04%	-4.14%
Nifty Healthcare	14,901.50	0.63%	3.12%	1.40%
Nifty IT	42,872.75	1.27%	1.62%	-1.20%
Nifty Media	2,056.50	-1.00%	3.07%	-2.92%
Nifty Metal	9,905.00	-0.28%	0.19%	5.70%
Nifty MNC	31,636.65	-0.09%	1.54%	0.53%
Nifty Pharma	23,680.00	0.41%	3.06%	0.95%
Nifty Realty	1,057.35	1.61%	3.65%	0.35%
Nifty Energy	41,534.95	0.05%	1.21%	-1.64%

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

## Nifty 50 Top 5 Gainers

Company	14-Oct-24	Prev_Day	% Change	1 Week
Wipro	549.55	528.30	4.02	3.41
Tech Mahindra	1,692.50	1,647.05	2.76	4.57
HDFC Standard Life Insurance Co	740.60	723.85	2.31	4.92
HDFC Bank	1,688.10	1,651.00	2.25	4.35
L&T Ltd.	3,555.05	3,482.55	2.08	2.50

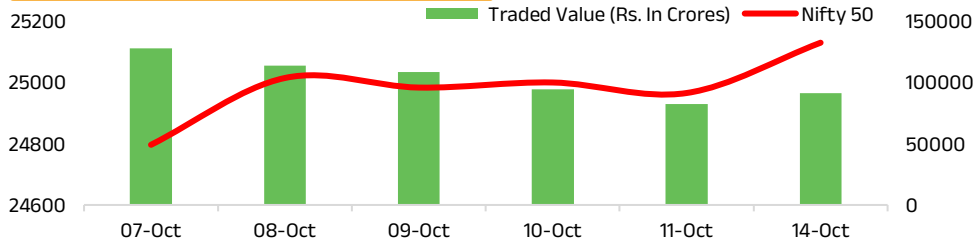
Source: NSE

## Nifty 50 Top 5 Losers

Company	14-Oct-24	Prev_Day	% Change	1 Week
ONGC	286.50	293	-2.07	-1.02
Maruti	12,537.85	12777	-1.87	0.08
Bajaj Finance	7,208.80	7302	-1.28	-0.83
Ultratech Cem	11,300.30	11421	-1.06	0.62
United Phos	578.65	583	-0.75	-0.28

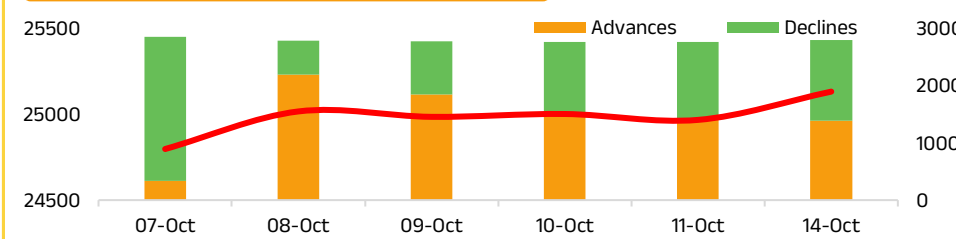
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

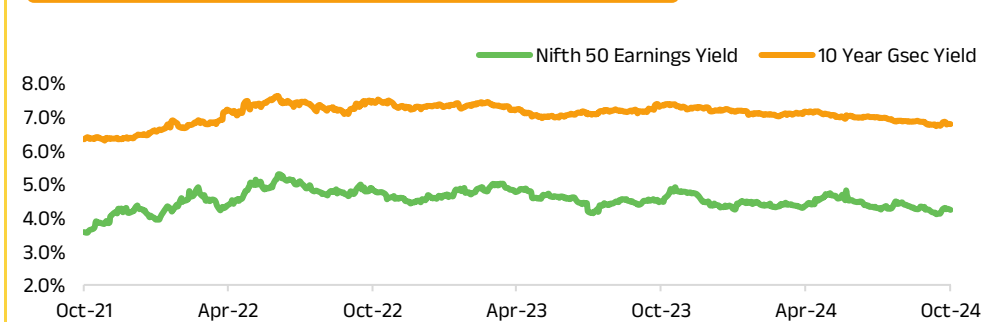
Indian equity markets experienced an increase following substantial gains observed in prominent banking and IT stocks. Further, a significant decline in oil prices contributed to a more positive sentiment following China's release of unsatisfactory inflation for the month of Sep 2024, along with a weekend stimulus announcement that failed to inspire confidence among investors.

Reliance Industries Ltd has announced a 5% drop in its consolidated net profit, reaching Rs. 16,563 crore for the Q2 FY25. This is down from Rs. 17,394 crore during the Q2 FY24. Revenue from operations saw a slight increase of 0.2% YoY, totaling Rs .235 lakh crore in this period.

HCL Technologies announced its consolidated net profit for the Q2 FY25 rose by 10.5% to Rs. 4,235 crore, compared to Rs. 3,832 crore in the same period last year. The company's revenue from operations reached Rs. 28,862 crore, marking an 8.2% increase from Rs .26,672 crore in the corresponding quarter of the previous financial year.

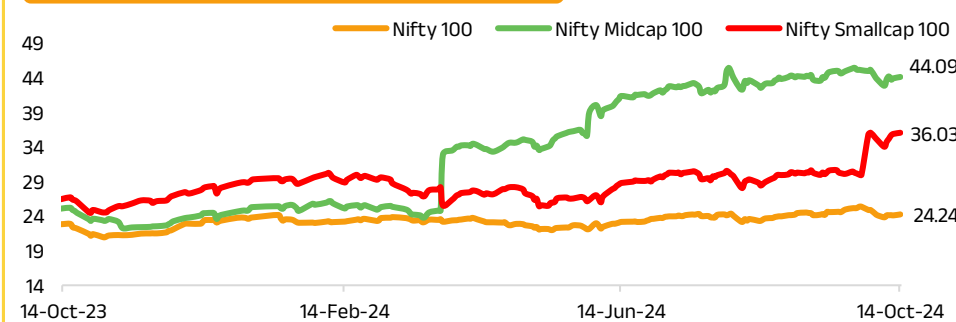
Sterling & Wilson Renewable Energy announced a net profit of Rs. 8.57 crore for Q2FY25, a significant improvement from a net loss of Rs. 54.51 crore in Q2FY24. Operational revenue surged by 35.7%, reaching Rs. 1,030.49 crore.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



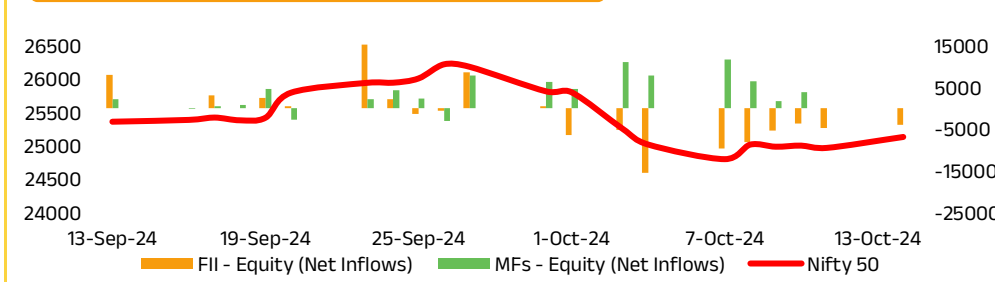
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	-4031.4	-62,742	-62,742	37,867
MF**	3730.98	46,673	46,673	322,649
DII	2278.09	60,070	60,070	399,822

Source: SEBI, NSDL;\*\*As on 10th Oct 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	25221.50	25049.50	0.69%
Near Basis	93.55	85.30	9.67%
Mid Futures	25363.50	25189.30	0.69%
Mid Basis	235.50	225.05	4.64%
Near Open Interest (Cr.)	1.35	1.38	-2.33%
Mid Open Interest (Cr.)	0.15	0.16	-1.58%
Rollover (%)	13.07	13.00	0.49%
Put Call Ratio (OI)	0.90	0.84	7.82%
Put Call Ratio(Vol)	0.82	0.87	-6.01%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2198	1882	35505
Index Options	1357121	1332428	407738
Stock Futures	21900	18578	344726
Stock Options	38025	47319	86961
Total	1419245	1400207	874929

Source: NSE

## Global Equity Market

Global Indices	14-Oct-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3200.75	0.75%	2.90%	4.29%
Nasdaq 100 (U.S.)	20439.05	0.82%	3.22%	4.74%
FTSE (U.K.)	8292.66	0.47%	-0.13%	0.24%
DAX Index (Germany)	19508.29	0.69%	2.12%	4.33%
CAC 40 Index (France)	7602.06	0.32%	0.34%	1.83%
SSE Composite (China)	3284.32	2.07%	NA	21.46%
Nikkei (Japan) <sup>[1]</sup>	39605.80	0.57%	0.69%	8.27%
Kospi (South Korea)	2623.29	1.02%	0.49%	1.86%
HangSeng (Hong Kong)	21092.87	-0.75%	-8.69%	21.44%
Strait Times (Singapore)	3595.91	0.62%	-0.09%	0.93%
Ibovespa Sao Paulo (Brazil)	131005.25	0.78%	-0.77%	-2.87%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8252.80	0.47%	0.58%	1.89%
Jakarta Composite (Indonesia)	7559.65	0.52%	0.74%	-3.23%
KLSE (Malaysia)	1636.54	0.18%	0.08%	-0.94%

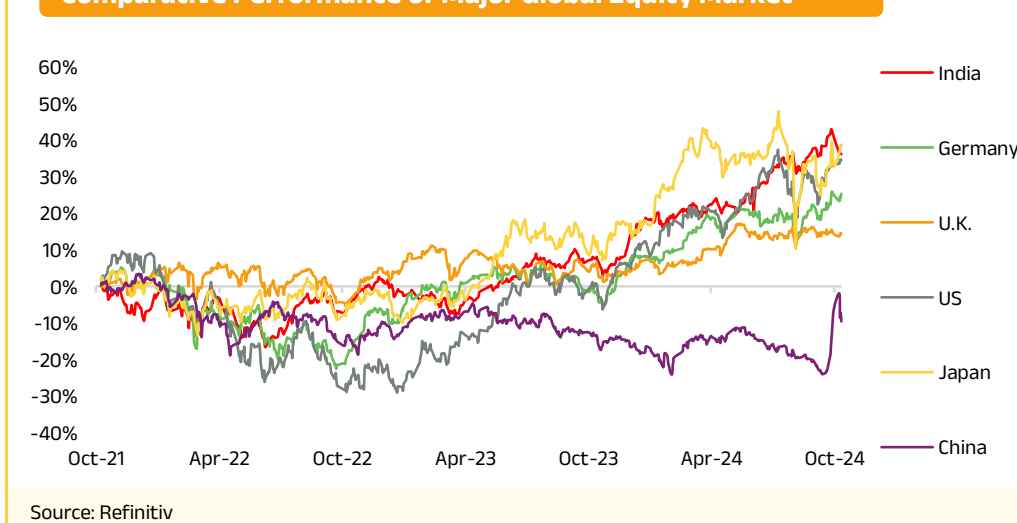
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

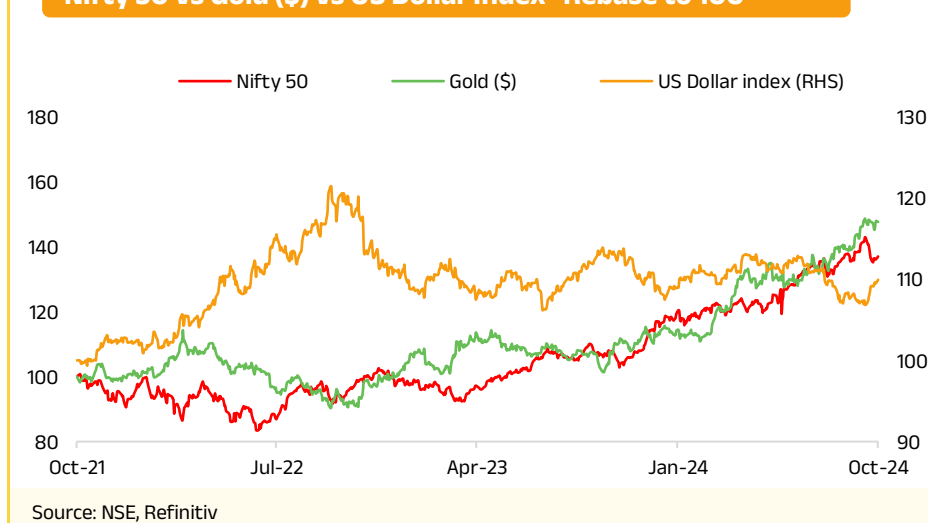
Commodity Prices	14-Oct-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	75,743	0.00%	0.11%	4.10%
Gold (\$/oz)	2,651.05	-0.19%	0.28%	2.89%
Silver (INR/1 kg)	90,283	0.00%	-1.61%	4.98%
Silver (\$/oz)	31.17	-1.13%	-1.73%	1.67%
Brent Crude(\$/bbl)	79.51	-2.21%	-3.48%	4.71%
Crude Oil (INR/1 bbl)	6,351.00	0.00%	1.70%	9.65%
NYMEX Crude(\$/bbl)	76.01	0.00%	-2.12%	9.38%
Natural Gas (INR/1 mmbtu)	221.20	0.00%	-7.68%	11.72%
Aluminium (INR/1 kg)	238.05	0.00%	-1.92%	5.19%
Copper (INR/1 kg)	834.00	0.00%	-2.40%	4.25%
Nickel (INR/1 kg)	1,485.00	0.00%	-2.08%	8.32%
Lead (INR/1 kg)	194.40	0.00%	1.04%	0.73%
Zinc (INR/1 kg)	286.95	0.00%	-1.81%	7.59%
Mentha Oil (INR/1 kg)	973.20	0.00%	0.17%	-2.06%
Baltic Dry Index <sup>[1]</sup>	1,809	1.06%	-5.14%	-4.29%

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



### Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



### Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.90	13.58	34.23	13.38
Mid Cap Fund	-0.26	22.49	48.21	21.27
Large & Mid Cap Fund	-0.47	18.52	42.66	17.73
Small Cap Fund	-0.34	22.64	43.37	22.26
Multi Cap Fund	-0.36	19.03	42.14	19.39
Focused Fund	-0.72	16.91	38.33	15.34
Value Fund	-1.04	16.68	43.41	19.57
Contra Fund	-0.80	18.22	46.84	21.94
ELSS	-0.43	17.19	38.35	17.26
Equity Savings	0.24	7.41	15.75	8.67
Arbitrage Fund	0.45	3.41	7.15	5.83
Dividend Yield Fund	-0.56	17.41	44.55	20.31
Aggressive Hybrid Fund	-0.35	13.81	30.81	13.50
Balanced Advantage	-0.12	10.00	24.17	11.56

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 11 Oct, 2024

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