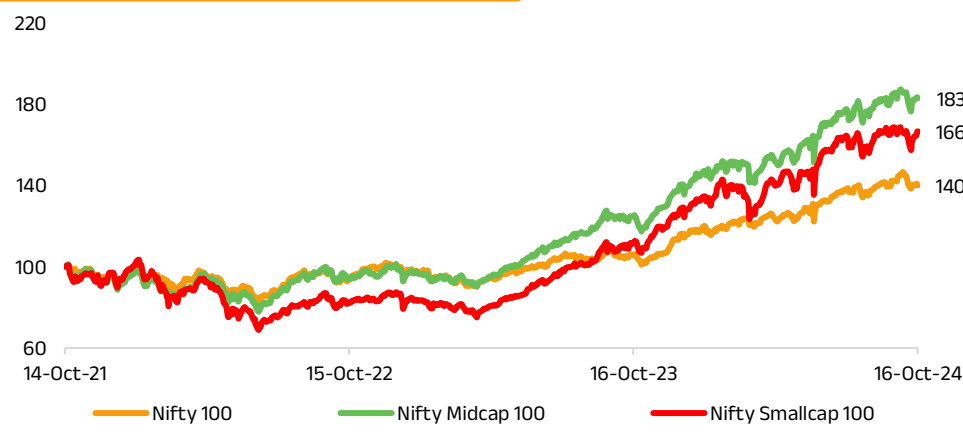


Broad Indices Historical Movement



Source: NSE

Broad Indices

	16-Oct-24	1 Day	1 Week	1 Month
Nifty 50	24,971.30	-0.34%	-0.04%	-1.62%
Nifty 100	26,058.10	-0.35%	-0.07%	-1.49%
Nifty 200	14,205.50	-0.33%	0.04%	-1.46%
Nifty 500	23,673.15	-0.26%	0.31%	-1.23%
Nifty Large Midcap 250	16,563.20	-0.27%	0.35%	-1.14%
Nifty Midcap 150	22,085.10	-0.20%	0.76%	-0.81%
Nifty Next 50	75,698.15	-0.21%	0.39%	0.31%
Nifty Smallcap 250	18,505.95	0.21%	2.22%	-0.36%

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

Smart Beta Index

Index	16-Oct-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,349.05	-0.48%	0.38%	2.18%
NIFTY 500 Value 50	14,980.65	0.02%	0.81%	0.33%
Nifty 200 Quality 30	22,911.00	-0.22%	0.23%	-1.83%
Nifty 50 Equal Weight	32,154.00	-0.39%	-0.43%	-1.60%
NIFTY Alpha Low Volatility 30	30,117.75	-0.21%	-0.67%	-1.00%
Nifty High Beta 50	3,966.25	-0.01%	0.35%	-3.25%
Nifty Low Volatility 50	25,529.23	-0.24%	-0.43%	-1.93%
Nifty Midcap150 Momentum 50	67,472.05	-0.36%	1.28%	0.94%
Nifty PSE	10,887.55	-0.09%	1.47%	-0.54%
Nifty SME Emerge	16,227.67	-0.07%	1.21%	-0.21%
Nifty 100 ESG	5,037.55	-0.42%	-0.32%	-1.78%

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

Sector Indices

Index	16-Oct-24	1 Day	1 Week	1 Month
Nifty Auto	25,909.00	-1.27%	-2.05%	0.31%
Nifty Bank	51,801.05	-0.20%	1.56%	-0.68%
Nifty Consumption	12,367.55	-0.78%	-0.70%	-0.62%
Nifty Financial	23,882.35	0.08%	1.43%	-0.45%
Nifty FMCG	62,373.25	-0.37%	0.06%	-3.44%
Nifty Healthcare	14,787.95	-0.50%	-1.23%	0.40%
Nifty IT	42,230.70	-1.17%	-0.92%	-2.59%
Nifty Media	2,059.35	-0.48%	-0.73%	-3.75%
Nifty Metal	9,741.70	-0.21%	-0.60%	3.33%
Nifty MNC	31,656.70	0.07%	-0.29%	0.90%
Nifty Pharma	23,467.35	-0.38%	-1.33%	0.08%
Nifty Realty	1,084.95	0.55%	3.13%	2.38%
Nifty Energy	41,304.65	0.05%	-0.18%	-2.97%

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

Nifty 50 Top 5 Gainers

Company	16-Oct-24	Prev_Day	% Change	1 Week
HDFC Standard Life Insurance Company Limited	726.80	714.25	1.76	1.32
Dr.Reddy	6,710.90	6,611.65	1.50	0.69
Grasim Indus	2,764.10	2,735.80	1.03	1.78
Bharti Airtel	1,733.95	1,717.25	0.97	3.33
HDFC Bank	1,699.80	1,684.10	0.93	4.08

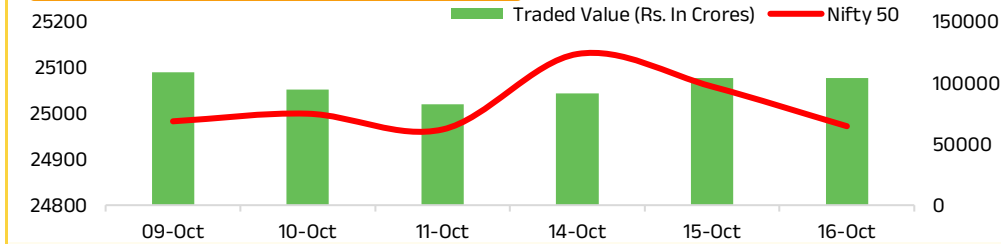
Source: NSE

Nifty 50 Top 5 Losers

Company	16-Oct-24	Prev_Day	% Change	1 Week
M&M	3,068.00	3156	-2.78	-2.70
Infosys	1,920.10	1959	-2.00	-1.67
Hero Moto	5,398.20	5506	-1.95	-2.82
Adani Ports & SEZ	1,403.80	1420	-1.16	-0.31
JSW Steel	989.35	1001	-1.15	-0.52

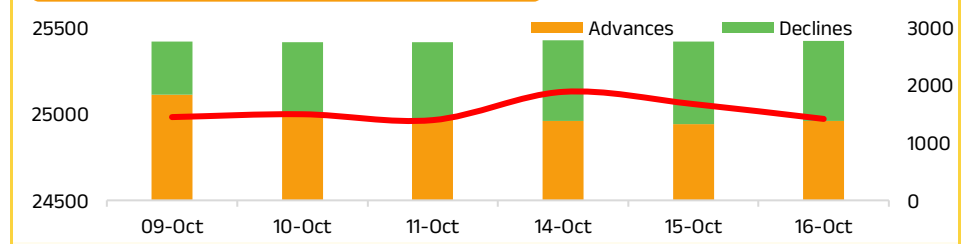
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

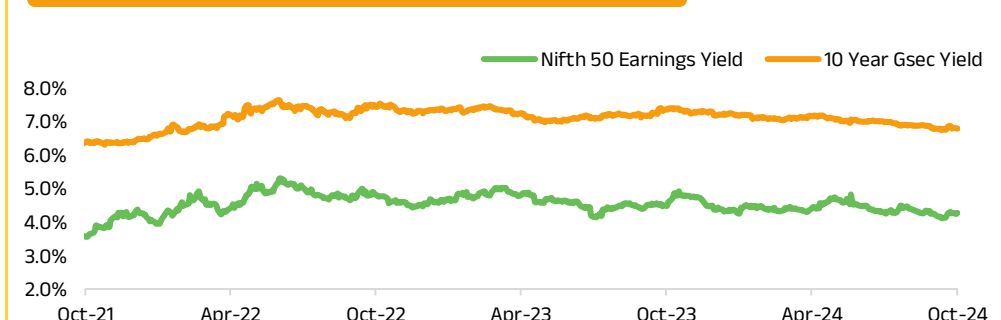
Indian equity markets fell for second consecutive session amid weak global cues and unimpressive Q2FY25 earnings of domestic companies. Foreign capital outflow remained another key factor weighing on market sentiment.

L&T Technology Services announced a slight increase of 2% in its consolidated net profit, reaching Rs. 320 crore for the quarter ended Sep 2024. This figure compares to Rs. 315 crore reported in the same quarter of the previous year. Revenue from operations in the reporting period increased 8% YoY to Rs. 2,573 crore.

Bajaj Auto announced a standalone net profit of Rs. 2,005 crore for the quarter ended Sep 2024. This represents a 9% increase compared to the Rs. 1,836 crore profit recorded in the same quarter of the previous year. The company reported revenue from operations at Rs. 13,127 crore.

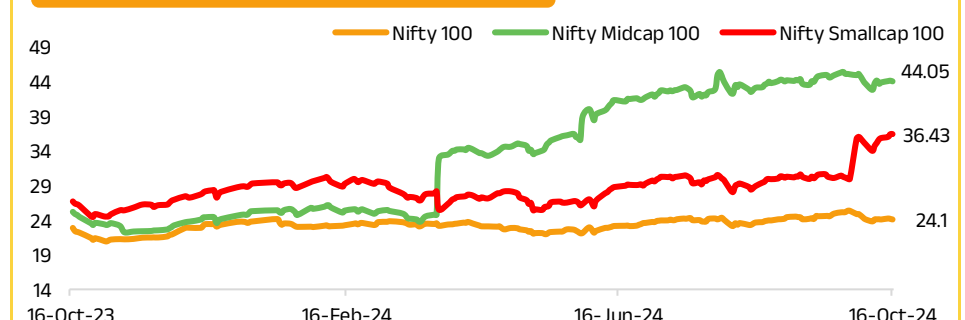
South Indian Bank reported an 18% rise in profit, amounting to Rs. 325 crore, for the second quarter ended Sep 2024. In the corresponding quarter of the previous year, the private sector bank had recorded a net profit of Rs. 275 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



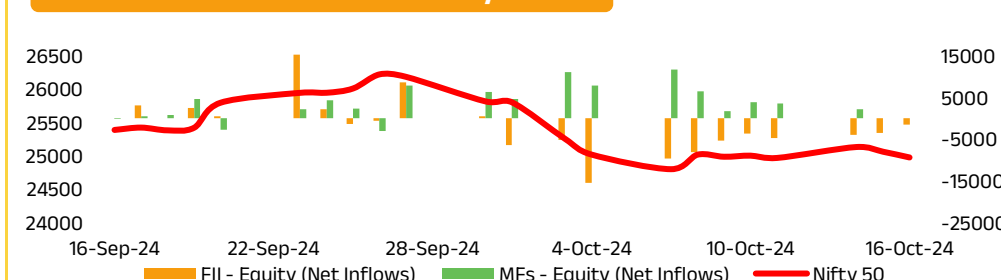
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-1533.83	-67,834	-67,834	32,775
MF**	2145.45	52,336	52,336	328,312
DII	2256.29	63,982	63,982	403,733

Source: SEBI, NSDL; **As on 14th Oct 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25048.80	25118.30	-0.28%
Near Basis	77.50	61.00	27.05%
Mid Futures	25196.00	25265.50	-0.28%
Mid Basis	224.70	208.20	7.93%
Near Open Interest (Cr.)	1.37	1.36	0.85%
Mid Open Interest (Cr.)	0.16	0.16	2.14%
Rollover (%)	13.48	13.43	0.40%
Put Call Ratio (OI)	0.74	0.77	-4.58%
Put Call Ratio(Vol)	0.86	1.03	-16.54%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1714	2126	34650
Index Options	2645749	2610031	448557
Stock Futures	22850	25084	344119
Stock Options	52440	48295	89169
Total	2722754	2685536	916495

Source: NSE

Global Equity Market

Global Indices	16-Oct-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3193.50	0.49%	1.03%	3.88%
Nasdaq 100 (U.S.)	20174.05	0.07%	-0.47%	3.87%
FTSE (U.K.)	8329.07	0.97%	1.04%	0.61%
DAX Index (Germany)	19432.81	-0.27%	0.92%	4.29%
CAC 40 Index (France)	7492.00	-0.40%	-0.90%	0.57%
SSE Composite (China)	3202.95	0.05%	-1.72%	18.45%
Nikkei (Japan)	39180.30	-1.83%	-0.25%	7.10%
Kospi (South Korea)	2610.36	-0.88%	0.62%	1.36%
HangSeng (Hong Kong)	20286.85	-0.16%	-1.70%	16.44%
Strait Times (Singapore)	3590.62	-0.13%	-0.14%	0.57%
Ibovespa Sao Paulo (Brazil)	131749.72	0.54%	1.38%	-2.49%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8284.70	-0.41%	1.19%	2.01%
Jakarta Composite (Indonesia)	7648.94	0.29%	1.97%	-2.09%
KLSE (Malaysia)	1632.63	-0.57%	-0.14%	-1.18%

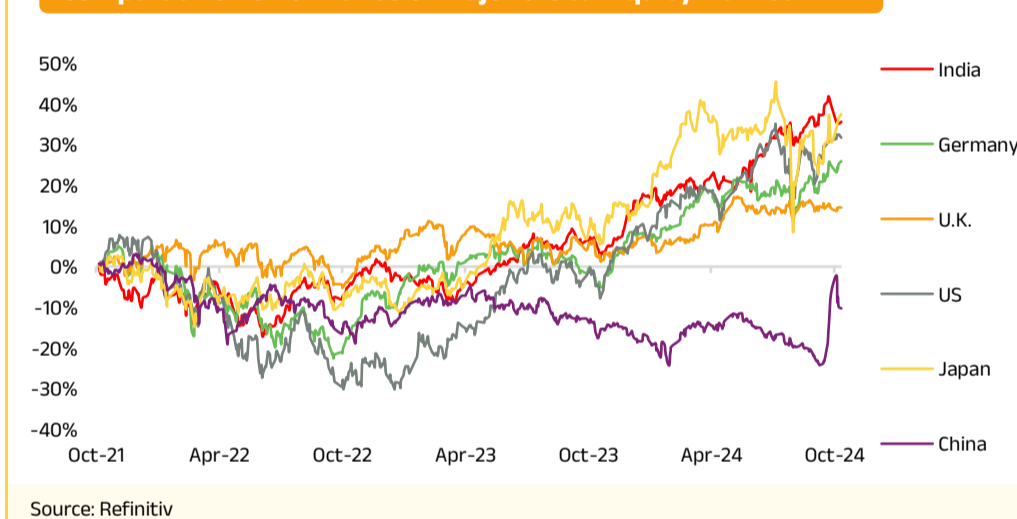
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

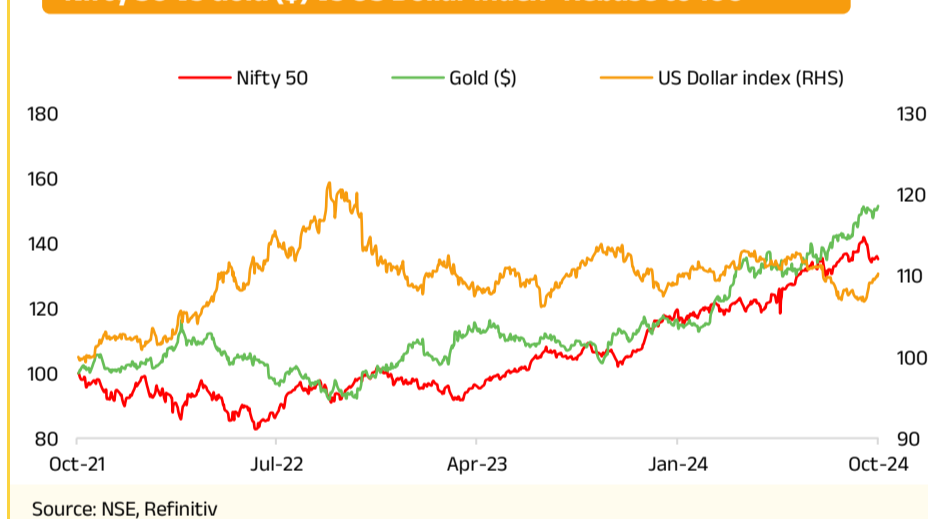
Commodity Prices	16-Oct-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	76,188	0.66%	2.14%	3.99%
Gold (\$/oz)	2,673.24	0.46%	2.51%	3.51%
Silver (INR/1 kg)	91,414	1.78%	3.45%	3.78%
Silver (\$/oz)	31.67	0.64%	3.80%	2.96%
Brent Crude(\$/bbl)	74.69	-0.04%	-4.06%	-1.96%
Crude Oil (INR/1 bbl)	5,934.00	-4.40%	-3.90%	3.00%
NYMEX Crude(\$/bbl)	70.87	-0.35%	-3.91%	-0.18%
Natural Gas (INR/1 mmbtu)	210.00	0.14%	-8.46%	8.58%
Aluminium (INR/1 kg)	239.30	1.55%	1.83%	3.26%
Copper (INR/1 kg)	823.00	0.67%	-1.63%	1.35%
Nickel (INR/1 kg)	1,473.20	-0.30%	-1.07%	8.26%
Lead (INR/1 kg)	193.00	-0.44%	-1.28%	0.99%
Zinc (INR/1 kg)	288.85	2.87%	2.57%	5.50%
Mentha Oil (INR/1 kg)	970.70	-0.23%	0.30%	-2.29%
Baltic Dry Index ^[1]	1,766	-2.65%	-1.83%	-6.86%

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



Moving Average

Definition: Moving average is a type of a technical indicator used in charts that smoothens random or short-term fluctuations in price movement. In other words, it is used to analyze data points by calculating a series of averages of different subsets of the full data set. It is widely used in technical analysis and there are broad two types of moving average (MA) - Simple and Exponential.



Explanation

MA uses the basic philosophy of averaging and plots a parallel line with the daily price movement to gauge the direction of the current trend. MA is not used to predict the price direction but rather define the current direction with a lag. To calculate MA, a technical analyst use specific period depending upon the time frame such as 14-day, 50-day, 100-day and 200-day. However, analyst can use any period depending upon situation or his or her preference. Among EMA 12 and 26-day are the most popular short-term averages. The extension of MA is crossover MA, which plots two lines of different periods to understand buy and sell signals.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-1.33	14.98	33.90	13.23
Mid Cap Fund	-0.13	24.24	48.45	21.30
Large & Mid Cap Fund	-0.50	20.18	42.69	17.71
Small Cap Fund	0.72	25.01	45.08	22.71
Multi Cap Fund	-0.24	20.84	42.45	19.43
Focused Fund	-0.94	18.53	38.42	15.27
Value Fund	-0.91	18.36	43.62	19.62
Contra Fund	-0.76	19.76	46.72	21.92
ELSS	-0.51	18.86	38.53	17.25
Equity Savings	0.25	7.88	15.84	8.66
Arbitrage Fund	0.49	3.33	7.20	5.82
Dividend Yield Fund	-0.67	18.83	44.68	20.34
Aggressive Hybrid Fund	-0.46	15.05	30.85	13.47
Balanced Advantage	-0.28	10.76	24.15	11.52

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 15 Oct, 2024

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.