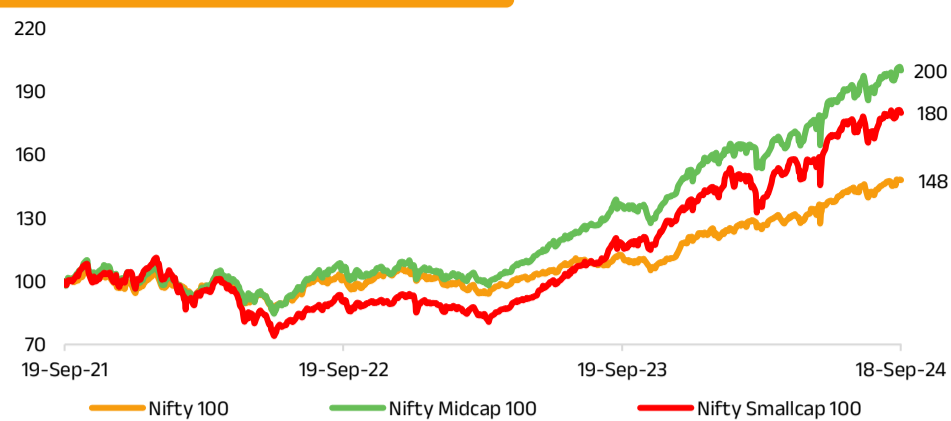


Broad Indices Historical Movement



Source: NSE

Broad Indices

	18-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,377.55	-0.16%	1.84%	3.41%
Nifty 100	26,420.15	-0.19%	1.66%	3.29%
Nifty 200	14,380.45	-0.28%	1.62%	3.35%
Nifty 500	23,898.65	-0.30%	1.56%	3.65%
Nifty Large Midcap 250	16,673.25	-0.45%	1.48%	3.48%
Nifty Midcap 150	22,079.90	-0.70%	1.29%	3.67%
Nifty Next 50	74,936.15	-0.43%	0.78%	2.73%
Nifty Smallcap 250	18,475.80	-0.34%	1.30%	6.36%

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

Smart Beta Index

Index	18-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,400.00	-0.48%	1.96%	1.45%
NIFTY 500 Value 50	14,789.32	-0.59%	1.49%	0.23%
Nifty 200 Quality 30	23,033.15	-1.29%	-0.18%	4.07%
Nifty 50 Equal Weight	32,598.50	-0.32%	1.64%	4.20%
NIFTY Alpha Low Volatility 30	30,342.05	-0.57%	1.33%	2.77%
Nifty High Beta 50	4,056.16	-0.43%	1.71%	-0.11%
Nifty Low Volatility 50	25,891.47	-0.67%	0.70%	4.32%
Nifty Midcap150 Momentum 50	66,788.55	-0.08%	3.56%	4.41%
Nifty PSE	10,807.90	-0.65%	0.54%	-3.37%
Nifty SME Emerge	16,003.22	-0.67%	-1.18%	5.93%
Nifty 100 ESG	5,110.20	-0.40%	1.43%	4.17%

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

Sector Indices

Index	18-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	25,804.45	-0.36%	2.23%	0.81%
Nifty Bank	52,750.40	1.08%	3.41%	4.42%
Nifty Consumption	12,472.05	-0.23%	1.50%	5.55%
Nifty Financial	24,326.90	1.40%	3.16%	5.88%
Nifty FMCG	64,615.05	-0.11%	-0.24%	3.86%
Nifty Healthcare	14,532.25	-1.31%	0.00%	4.70%
Nifty IT	42,089.30	-3.05%	-0.90%	2.96%
Nifty Media	2,107.70	-0.30%	1.54%	2.33%
Nifty Metal	9,310.55	-0.83%	3.13%	3.52%
Nifty MNC	31,182.75	-0.72%	0.67%	1.95%
Nifty Pharma	23,025.20	-1.53%	-0.84%	4.16%
Nifty Realty	1,063.75	-0.23%	3.61%	1.44%
Nifty Energy	42,350.70	-0.70%	1.74%	-0.96%

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

Nifty 50 Top 5 Gainers

Company	18-Sep-24	Prev_Day	% Change	1 Week
Bajaj Finance	7,631.10	7,365.50	3.61	3.89
ICICI Bank	1,288.35	1,268.10	1.60	4.21
HDFC Bank	1,694.80	1,668.80	1.56	3.10
SBI Life Insurance Company Lim	1,842.45	1,819.15	1.28	-0.90
SBI	792.75	782.90	1.26	3.14

Source: NSE

Nifty 50 Top 5 Losers

Company	18-Sep-24	Prev_Day	% Change	1 Week
TCS	4,346.15	4506	-3.54	-2.97
HCL Tech	1,756.50	1814	-3.16	-1.25
Infosys	1,892.15	1953	-3.09	-0.94
Tech Mahindra	1,605.40	1652	-2.79	0.17
Wipro	538.15	552	-2.49	4.63

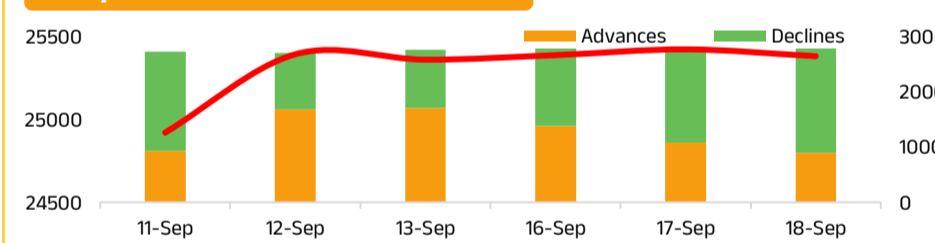
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

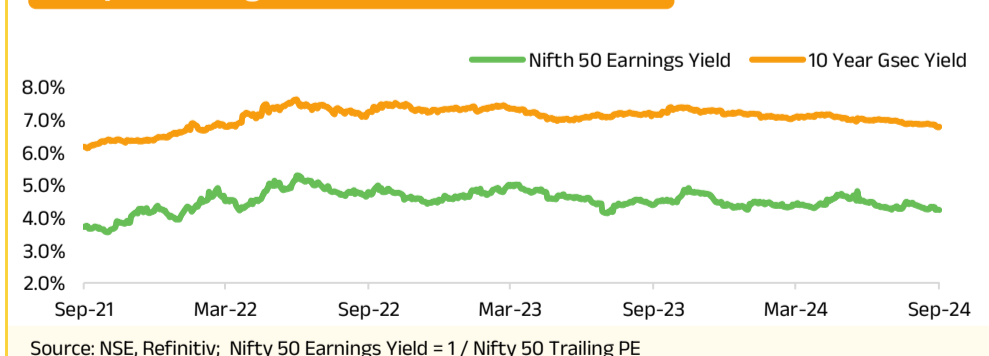
Indian equity markets gave up early gains and closed in red as investors remained cautious ahead of the U.S. Federal Reserve's meeting outcome, where the announcement of the first rate cut in four years is anticipated. The key benchmark indices remained volatile throughout the session as markets witnessed a tug-of-war between declining information technology stocks and resilient financial shares.

Tata Power Renewable Energy has announced that it has obtained a 400 MW wind-solar hybrid project from the Maharashtra State Electricity Distribution Company Ltd (MSEDCL). Tata Power Renewable Energy Ltd (TPREL), a subsidiary of Tata Power, has received a Letter of Award (LoA) from MSEDCL, which is a wholly owned entity of the Maharashtra government, for the establishment of a 400 MW wind-solar hybrid project in the state of Maharashtra.

Aurobindo Pharma Ltd will acquire the remaining 49% stake in GLS Pharma Ltd for Rs. 22.5 crore, thereby transforming it into a wholly owned subsidiary. The acquisition of 5,90,361 equity shares is anticipated to be finalized by Dec 31, 2024. GLS Pharma focuses on oncology products, particularly chemotherapy treatments.

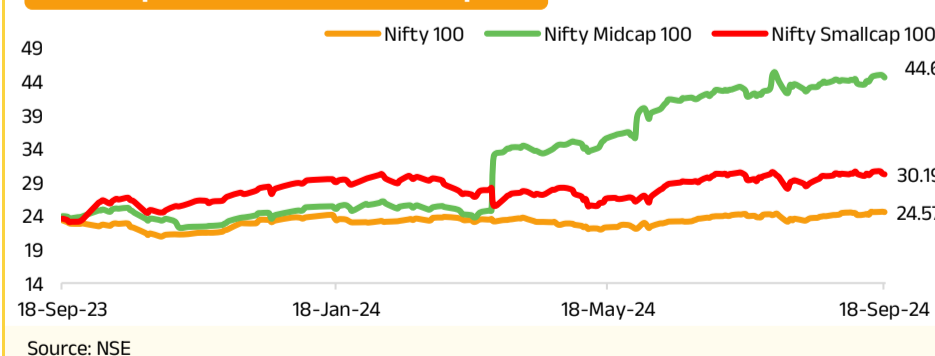
Tata Group and Analog Devices (ADI) have formed a partnership to investigate semiconductor manufacturing prospects in India. Tata Electronics, Tata Motors, and Tejas Networks have entered a Memorandum of Understanding with ADI to strengthen collaboration and incorporate ADI's products into Tata's applications, including electric vehicles and network infrastructure.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



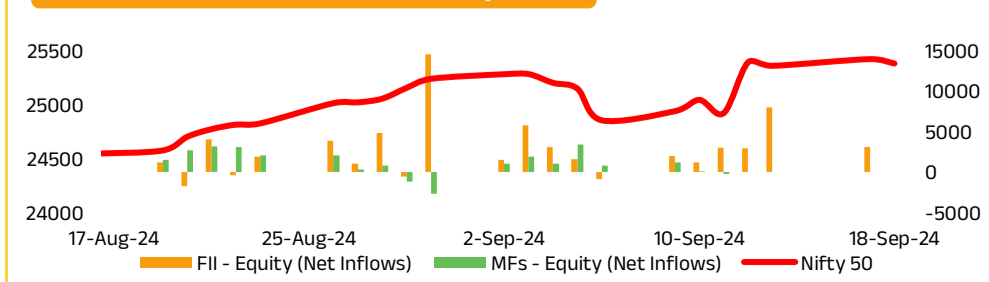
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	3045.76	30,908	70,593	73,794
MF**	-250.09	8,951	61,237	252,663
DII	152.31	11,667	83,432	319,559

Source: SEBI, NSDL; *As on 17th Sep 2024; **As on 11th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25396.10	25449.80	-0.21%
Near Basis	18.55	31.25	-40.64%
Mid Futures	25519.80	25571.70	-0.20%
Mid Basis	142.25	153.10	-7.09%
Near Open Interest (Cr.)	1.32	1.37	-3.43%
Mid Open Interest (Cr.)	0.19	0.17	6.51%
Rollover (%)	14.48	13.42	7.93%
Put Call Ratio (OI)	1.13	1.30	-12.97%
Put Call Ratio(Vol)	0.91	0.91	-0.10%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1927	1502	40130
Index Options	2289979	2326142	414497
Stock Futures	21578	22701	339537
Stock Options	51616	54256	57996
Total	2365101	2404601	852160

Source: NSE

Global Equity Market

Global Indices	18-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3068.19	-0.26%	1.36%	1.31%
Nasdaq 100 (U.S.)	19344.49	-0.45%	0.56%	-0.84%
FTSE (U.K.)	8253.68	-0.68%	0.73%	-0.69%
DAX Index (Germany)	18711.49	-0.08%	2.08%	2.12%
CAC 40 Index (France)	7444.90	-0.57%	0.65%	-0.06%
SSE Composite (China)	2717.28	0.49%	-0.17%	-5.63%
Nikkei (Japan)	36380.17	0.49%	2.13%	-4.42%
Kospi (South Korea) ^[2]	2575.41	0.13%	2.47%	-4.52%
HangSeng (Hong Kong) ^[1]	17660.02	1.37%	3.22%	1.32%
Strait Times (Singapore)	3592.42	-0.03%	1.73%	7.14%
Ibovespa Sao Paulo (Brazil)	133747.69	-0.90%	-0.69%	-0.15%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8142.10	0.01%	1.93%	2.15%
Jakarta Composite (Indonesia)	7829.14	-0.03%	0.88%	5.34%
KLSE (Malaysia)	1660.59	-0.22%	1.27%	2.26%

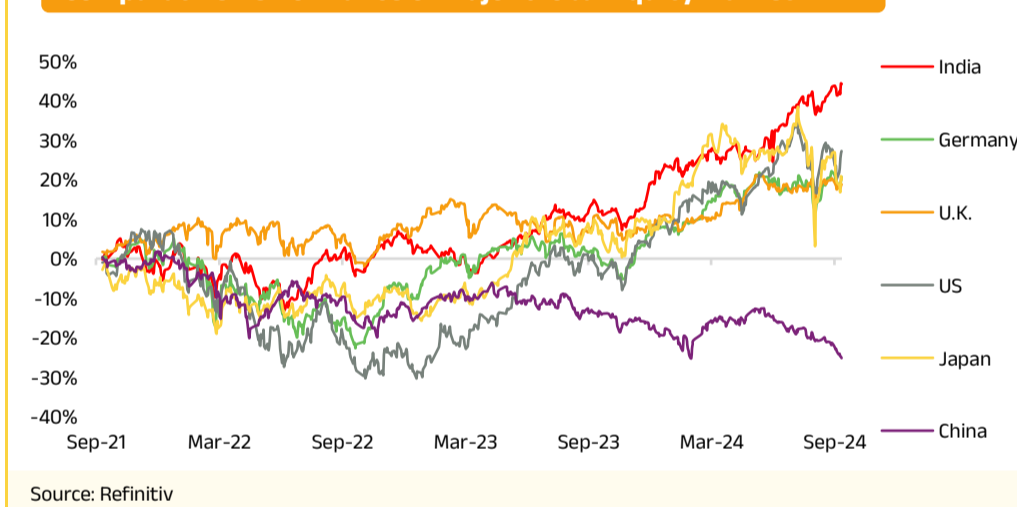
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

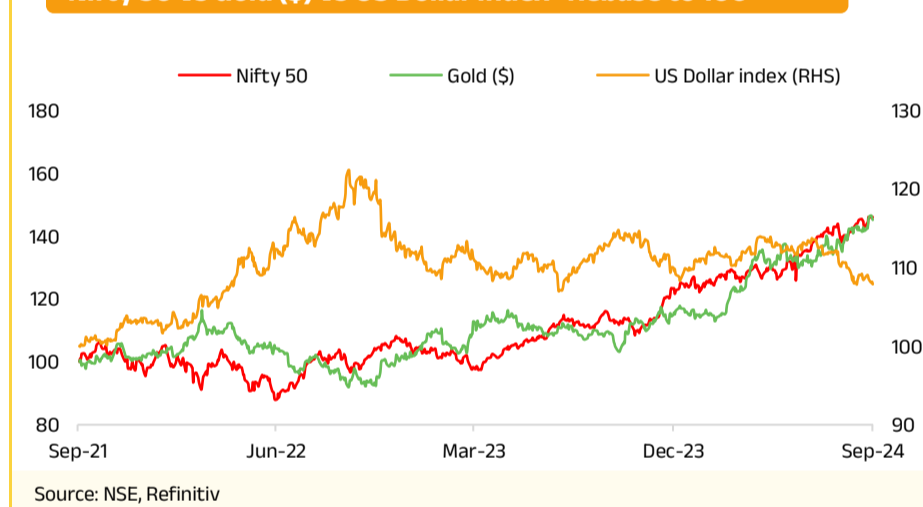
Commodity Prices	18-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	72,855	-0.13%	1.61%	3.69%
Gold (\$/oz)	2,558.80	-0.42%	1.89%	2.05%
Silver (INR/1 kg)	87,197	-0.26%	5.05%	7.01%
Silver (\$/oz)	30.06	-2.20%	4.79%	3.63%
Brent Crude(\$/bbl)	76.76	-0.04%	5.80%	-7.25%
Crude Oil (INR/1 bbl)	5,968.00	1.50%	8.10%	-7.63%
NYMEX Crude(\$/bbl)	71.77	-0.40%	5.31%	-7.87%
Natural Gas (INR/1 mmbtu)	194.80	-2.16%	3.95%	4.56%
Aluminium (INR/1 kg)	232.00	0.11%	4.67%	6.42%
Copper (INR/1 kg)	811.50	-0.78%	2.19%	2.41%
Nickel (INR/1 kg)	1,372.30	-0.95%	1.13%	0.43%
Lead (INR/1 kg)	193.15	0.47%	-0.10%	-0.36%
Zinc (INR/1 kg)	269.90	-0.55%	3.33%	1.91%
Mentha Oil (INR/1 kg)	988.40	-0.50%	-0.51%	-0.99%
Baltic Dry Index ^[1]	1,901	0.26%	-3.16%	12.42%

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



Primary Instrument

Definition: It is a type of financial instrument whose price is derived from its own market value or whose price is not derived from any other instrument. It simply means that the price of the primary instrument is directly determined by the market.



Explanation

A primary instrument has its own intrinsic value or worth unlike derivatives that depend upon the value of its underlying asset. Due to this intrinsic value, an investor is required to have basic knowledge of markets and investment principles.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.60	19.03	33.79	15.24
Mid Cap Fund	4.17	31.42	47.94	23.49
Large & Mid Cap Fund	4.02	25.96	42.13	19.90
Small Cap Fund	5.31	33.09	45.88	24.97
Multi Cap Fund	4.35	26.76	42.73	21.23
Focused Fund	4.79	23.61	38.07	17.28
Value Fund	3.66	23.59	43.88	22.05
Contra Fund	4.01	26.02	46.72	24.19
ELSS	4.16	24.14	38.33	19.34
Equity Savings	1.61	9.12	15.57	9.17
Arbitrage Fund	0.58	3.67	7.35	5.73
Dividend Yield Fund	2.72	23.49	44.35	22.53
Aggressive Hybrid Fund	3.19	18.27	30.47	14.93
Balanced Advantage	2.33	13.01	23.64	12.33

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 17 Sep, 2024; ^[2]Data as on 13 Sep, 2024

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