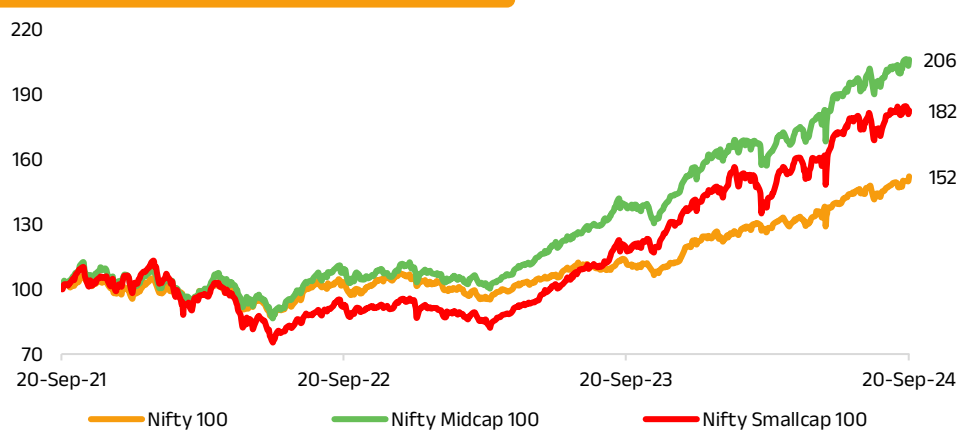


Broad Indices Historical Movement



Source: NSE

Broad Indices

	20-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,790.95	1.48%	1.71%	4.42%
Nifty 100	26,821.00	1.50%	1.52%	4.03%
Nifty 200	14,580.90	1.49%	1.32%	3.92%
Nifty 500	24,193.80	1.42%	1.11%	3.92%
Nifty Large Midcap 250	16,866.35	1.41%	0.91%	3.70%
Nifty Midcap 150	22,256.10	1.32%	0.30%	3.38%
Nifty Next 50	75,481.85	1.43%	0.07%	2.04%
Nifty Smallcap 250	18,464.65	1.06%	-0.42%	4.13%

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

Smart Beta Index

Index	20-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,583.15	1.51%	0.38%	1.00%
NIFTY 500 Value 50	14,706.64	0.50%	-1.46%	-2.90%
Nifty 200 Quality 30	23,238.90	1.15%	-0.57%	4.02%
Nifty 50 Equal Weight	32,973.10	1.19%	0.89%	4.19%
NIFTY Alpha Low Volatility 30	30,757.20	1.19%	1.20%	3.87%
Nifty High Beta 50	4,056.59	1.49%	-1.05%	-2.11%
Nifty Low Volatility 50	26,260.81	1.06%	0.72%	5.02%
Nifty Midcap150 Momentum 50	67,347.10	2.08%	2.07%	3.75%
Nifty PSE	10,754.90	1.13%	-1.45%	-5.38%
Nifty SME Emerge	15,849.39	0.55%	-3.47%	3.04%
Nifty 100 ESG	5,174.60	1.31%	0.91%	4.42%

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

Sector Indices

Index	20-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	26,394.55	1.88%	2.22%	3.51%
Nifty Bank	53,793.20	1.42%	3.57%	5.89%
Nifty Consumption	12,816.90	2.13%	2.93%	8.51%
Nifty Financial	24,789.20	1.58%	3.38%	6.95%
Nifty FMCG	65,870.80	1.38%	1.24%	5.83%
Nifty Healthcare	14,649.30	0.99%	-0.31%	4.49%
Nifty IT	42,204.40	0.62%	-2.74%	1.52%
Nifty Media	2,062.95	0.33%	-2.62%	-0.59%
Nifty Metal	9,404.30	1.65%	0.36%	2.17%
Nifty MNC	31,711.65	1.60%	0.77%	3.28%
Nifty Pharma	23,005.25	0.33%	-1.93%	2.82%
Nifty Realty	1,101.60	3.05%	4.55%	4.68%
Nifty Energy	42,850.00	1.24%	1.47%	-1.56%

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

Nifty 50 Top 5 Gainers

Company	20-Sep-24	Prev_Day	% Change	1 Week
M&M	2,950.85	2,797.50	5.48	7.73
ICICI Bank	1,338.45	1,292.00	3.60	7.05
JSW Steel	981.55	948.40	3.50	2.83
L&T Ltd.	3,793.90	3,683.70	2.99	5.01
Bharti Airtel	1,711.75	1,664.85	2.82	4.73

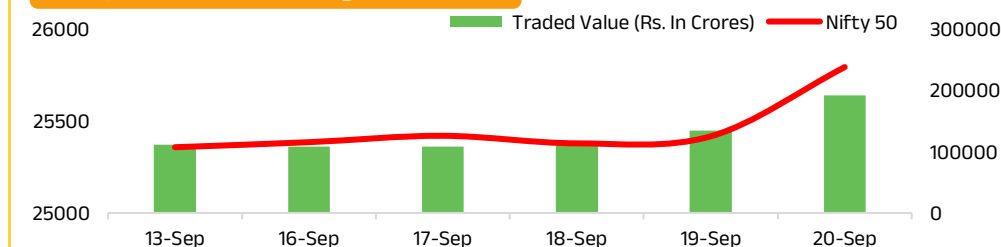
Source: NSE

Nifty 50 Top 5 Losers

Company	20-Sep-24	Prev_Day	% Change	1 Week
Grasim Indus	2,678.25	2739	-2.22	-3.81
United Phos	587.10	595	-1.29	-3.97
SBI	781.70	790	-1.04	-1.16
IndusInd Bank	1,480.20	1485	-0.31	1.10
TCS	4,284.90	4296	-0.26	-5.26

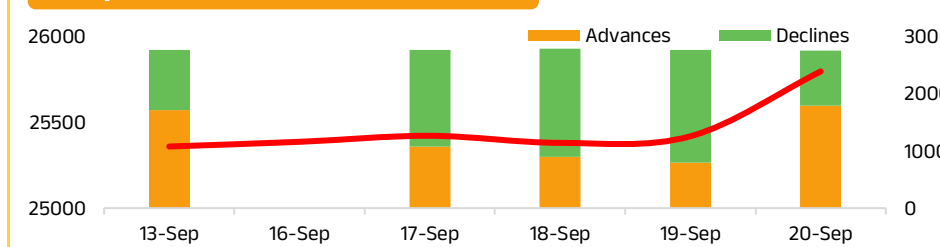
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

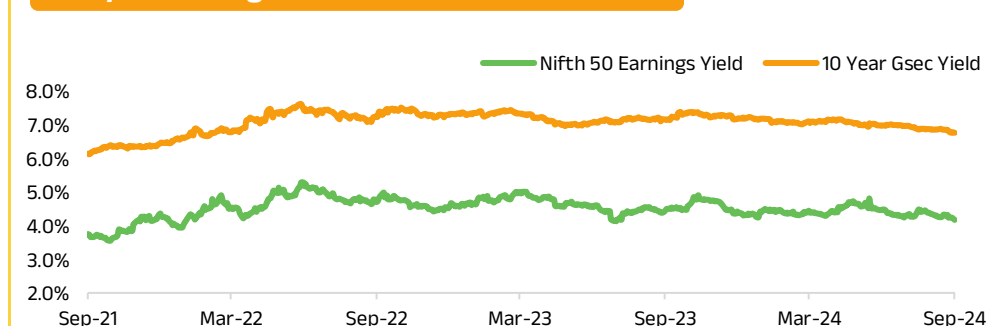
Indian equity markets closed with healthy gains amid positive global cues. The key benchmark indices reached fresh highs on expectations of inflow of foreign funds into domestic equity markets following the big interest rate cut by the U.S. Federal Reserve. Sentiments were further boosted following the hint from the U.S. central bank of further reductions in rates in the coming months.

Reliance Infrastructure is poised to obtain an equity infusion of Rs 1,100 crore from its promoters, along with an additional Rs 1,910 crore from two investment firms located in Mumbai. 19th Sep, 2024, the board of the company sanctioned a fundraising initiative exceeding Rs 6,000 crore.

Tata Consultancy Services (TCS) has declared the inauguration of a new delivery center in Warsaw, Poland, thereby enhancing its operational presence in the nation. The establishment of this center is anticipated to result in a doubling of TCS's workforce to exceed 1,200 within the next year, facilitating additional growth in the area.

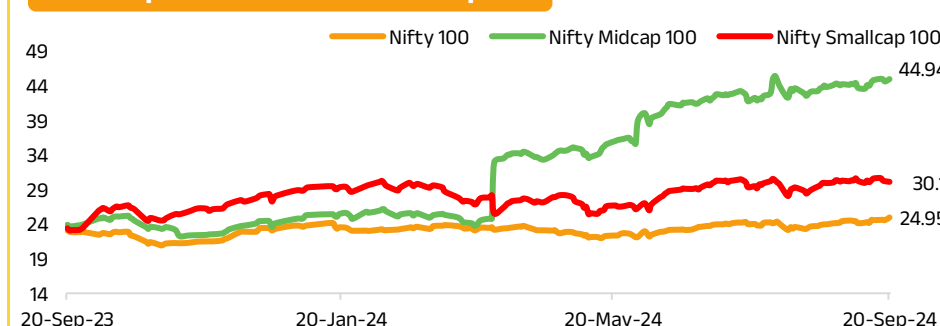
Larsen & Toubro (L&T) announced that it has acquired 12.5 million equity shares, which equates to a 12.25% ownership stake, in the Indian Foundation for Quality Management (IFQM). This acquisition, valued at Rs 12.5 crore, is in line with L&T's overarching goal to improve the global image of 'Brand India' by advancing the quality of products and services across multiple sectors.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



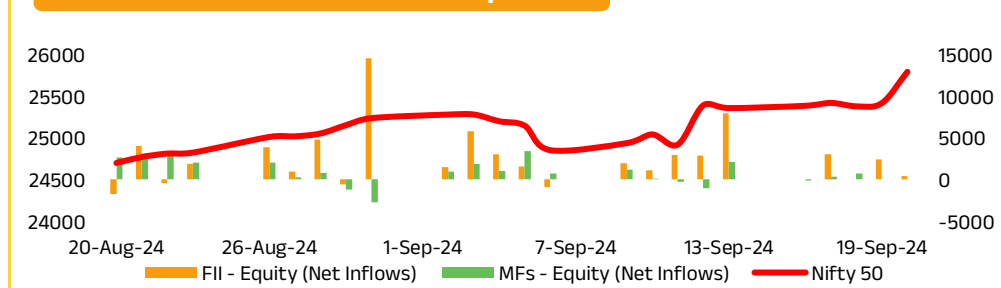
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	410.53	33,700	73,385	76,585
MF**	762.46	10,992	63,278	254,704
DII	-4427.08	9,253	81,017	317,144

Source: SEBI, NSDL; **As on 18th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25767.80	25489.10	1.09%
Near Basis	-23.20	73.30	-131.65%
Mid Futures	25887.40	25611.80	1.08%
Mid Basis	96.45	195.95	-50.78%
Near Open Interest (Cr.)	1.38	1.30	5.65%
Mid Open Interest (Cr.)	0.36	0.22	62.12%
Rollover (%)	23.38	16.98	37.66%
Put Call Ratio (OI)	1.50	0.97	54.77%
Put Call Ratio(Vol)	0.78	1.10	-28.68%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4396	5320	42197
Index Options	4143363	4137956	391054
Stock Futures	48598	45206	338415
Stock Options	102318	104299	64377
Total	4298675	4292781	836044

Source: NSE

Global Equity Market

Global Indices	20-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3114.23	-0.21%	1.48%	2.10%
Nasdaq 100 (U.S.)	19791.49	-0.24%	1.42%	0.36%
FTSE (U.K.)	8229.99	-1.19%	-0.52%	-0.52%
DAX Index (Germany)	18720.01	-1.49%	0.11%	1.97%
CAC 40 Index (France)	7500.26	-1.51%	0.47%	0.19%
SSE Composite (China)	2736.81	0.03%	1.21%	-4.53%
Nikkei (Japan)	37723.91	1.53%	3.12%	-0.89%
Kospi (South Korea)	2593.37	0.49%	0.70%	-3.83%
HangSeng (Hong Kong)	18258.57	1.36%	5.12%	4.27%
Strait Times (Singapore)	3624.76	-0.23%	1.74%	7.55%
Ibovespa Sao Paulo (Brazil)	131065.44	-1.55%	-2.83%	-3.69%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8209.50	0.21%	1.35%	2.65%
Jakarta Composite (Indonesia)	7743.00	-2.05%	-0.88%	2.77%
KLSE (Malaysia)	1668.82	0.19%	1.01%	1.59%

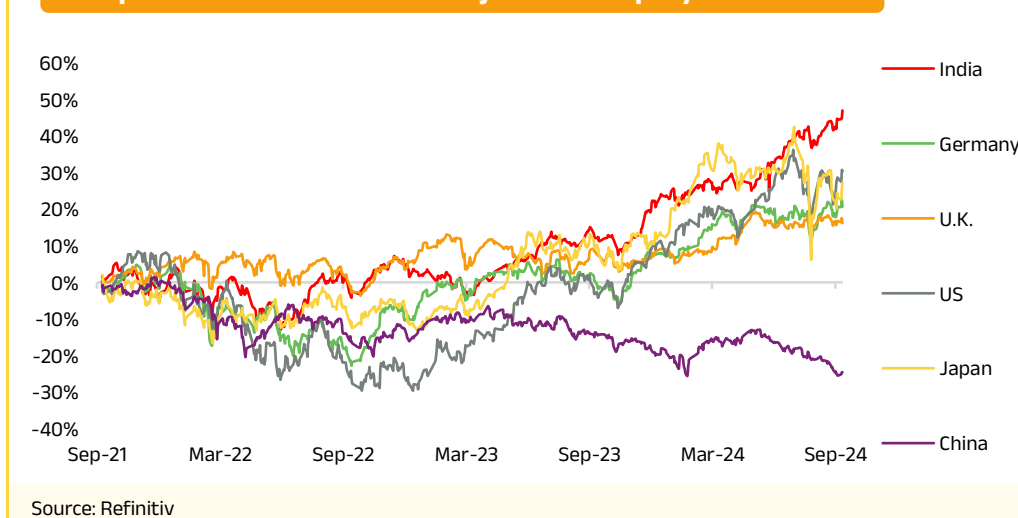
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

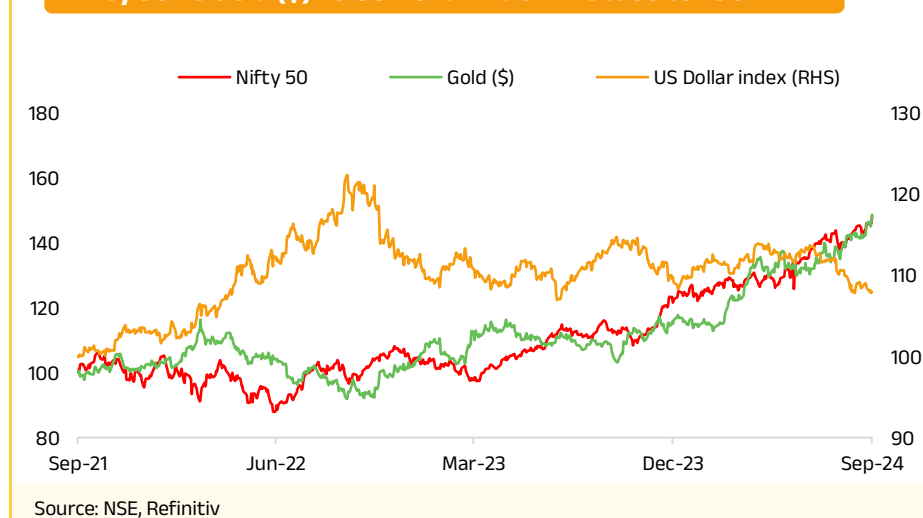
Commodity Prices	20-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	73,715	0.59%	1.31%	2.84%
Gold (\$/oz)	2,621.96	1.37%	1.76%	4.31%
Silver (INR/1 kg)	88,560	-0.03%	2.97%	4.05%
Silver (\$/oz)	31.11	1.06%	1.48%	5.73%
Brent Crude(\$/bbl)	78.20	0.04%	2.99%	-2.31%
Crude Oil (INR/1 bbl)	6,016.00	1.21%	3.87%	-3.61%
NYMEX Crude(\$/bbl)	72.62	-0.19%	4.50%	-3.33%
Natural Gas (INR/1 mmbtu)	196.30	2.51%	-0.86%	4.64%
Aluminium (INR/1 kg)	232.50	-0.66%	2.74%	3.04%
Copper (INR/1 kg)	818.50	0.00%	2.31%	1.90%
Nickel (INR/1 kg)	1,391.50	0.01%	1.50%	-1.95%
Lead (INR/1 kg)	192.85	-1.36%	-0.08%	-0.26%
Zinc (INR/1 kg)	270.30	-1.10%	1.35%	0.17%
Mentha Oil (INR/1 kg)	985.10	-0.85%	-0.87%	-1.29%
Baltic Dry Index	1,977	0.05%	4.60%	13.95%

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	4.13	21.76	36.86	16.23
Mid Cap Fund	3.80	33.69	49.85	24.58
Large & Mid Cap Fund	3.93	28.22	44.31	20.85
Small Cap Fund	3.95	34.00	46.84	25.69
Multi Cap Fund	4.15	28.77	44.79	22.24
Focused Fund	4.99	26.08	41.00	18.27
Value Fund	3.03	25.40	45.70	22.89
Contra Fund	3.78	27.89	48.50	24.94
ELSS	3.98	26.20	40.64	20.25
Equity Savings	1.65	9.77	16.33	9.45
Arbitrage Fund	0.56	3.65	7.49	5.72
Dividend Yield Fund	1.89	25.02	45.46	23.20
Aggressive Hybrid Fund	3.37	20.08	32.41	15.66
Balanced Advantage	2.38	14.25	25.06	12.77

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.

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