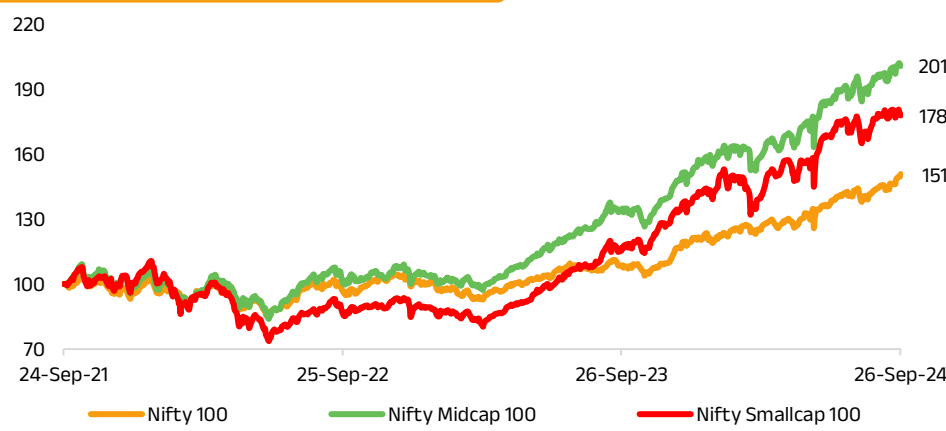


Broad Indices Historical Movement



Source: NSE

Broad Indices

	26-Sep-24	1 Day	1 Week	1 Month
Nifty 50	26,216.05	0.81%	3.15%	4.82%
Nifty 100	27,256.25	0.76%	3.14%	4.52%
Nifty 200	14,789.35	0.64%	2.94%	4.21%
Nifty 500	24,496.90	0.52%	2.70%	3.97%
Nifty Large Midcap 250	17,046.05	0.40%	2.49%	3.66%
Nifty Midcap 150	22,367.85	0.05%	1.83%	2.80%
Nifty Next 50	77,086.95	0.74%	3.58%	3.10%
Nifty Smallcap 250	18,434.95	-0.45%	0.90%	1.96%

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

Smart Beta Index

Index	26-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,820.35	0.91%	4.95%	3.00%
NIFTY 500 Value 50	15,299.11	0.98%	4.55%	-0.25%
Nifty 200 Quality 30	23,381.65	0.61%	1.77%	3.09%
Nifty 50 Equal Weight	33,581.05	1.14%	3.06%	4.57%
NIFTY Alpha Low Volatility 30	31,337.50	0.82%	3.10%	4.30%
Nifty High Beta 50	4,135.99	0.50%	3.48%	-0.61%
Nifty Low Volatility 50	26,553.28	0.70%	2.18%	4.38%
Nifty Midcap150 Momentum 50	67,492.95	-0.29%	2.30%	2.72%
Nifty PSE	11,136.70	0.22%	4.72%	-2.69%
Nifty SME Emerge	16,191.30	-0.55%	2.72%	1.71%
Nifty 100 ESG	5,239.05	0.80%	2.57%	4.53%

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

Sector Indices

Index	26-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	27,496.25	2.26%	6.13%	5.99%
Nifty Bank	54,375.35	0.51%	2.52%	6.31%
Nifty Consumption	13,038.65	1.15%	3.90%	8.32%
Nifty Financial	25,155.45	0.67%	3.08%	7.57%
Nifty FMCG	66,156.90	0.97%	1.82%	3.93%
Nifty Healthcare	14,700.00	0.17%	1.34%	4.11%
Nifty IT	42,160.90	0.48%	0.51%	1.20%
Nifty Media	2,148.00	0.41%	4.47%	4.05%
Nifty Metal	9,985.70	2.13%	7.94%	5.22%
Nifty MNC	32,590.35	1.32%	4.42%	5.10%
Nifty Pharma	23,250.90	0.01%	1.40%	3.09%
Nifty Realty	1,131.30	0.10%	5.83%	9.20%
Nifty Energy	44,145.05	0.18%	4.30%	0.81%

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

Nifty 50 Top 5 Gainers

Company	26-Sep-24	Prev_Day	% Change	1 Week
Maruti	13,383.80	12,785.30	4.68	8.36
Grasim Indus	2,745.85	2,662.00	3.15	0.25
Tata Motors	993.15	963.60	3.07	2.70
M&M	3,181.10	3,091.05	2.91	13.71
JSW Steel	1,005.55	982.65	2.33	6.03

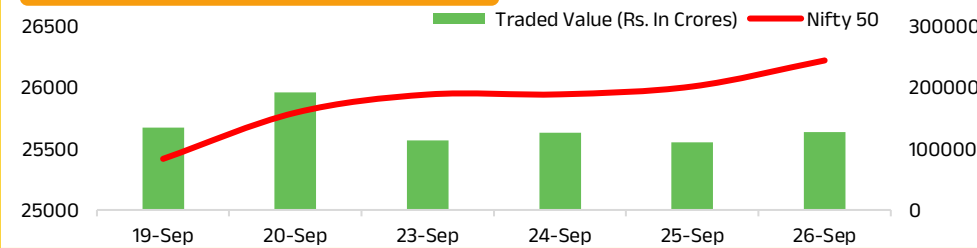
Source: NSE

Nifty 50 Top 5 Losers

Company	26-Sep-24	Prev_Day	% Change	1 Week
Cipla	1,621.80	1643	-1.30	-0.97
ONGC	295.20	299	-1.17	3.49
L&T Ltd.	3,762.15	3794	-0.84	2.13
Hero Moto	6,051.45	6088	-0.61	0.76
NTPC	434.60	436	-0.34	2.51

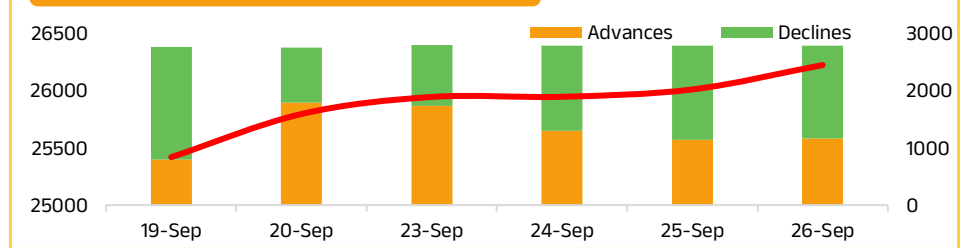
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

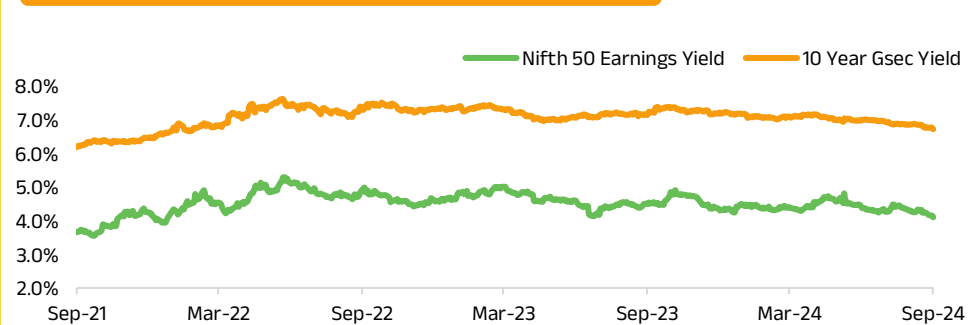
Indian equity markets continued its record-breaking run, with its key benchmark indices closed near new all-time high with healthy gains. The influx of retail investors, the robustness of India's economic expansion, and increasing optimism regarding the possible initiation of a rate-cutting cycle have propelled the market upward.

Tata Electronics has finalised an agreement with Taiwan's Powerchip Semiconductor Manufacturing Corporation to establish India's first AI-enabled semiconductor factory in Gujarat. This facility is set to manufacture up to 50,000 wafers monthly, generating more than 20,000 jobs and meeting the increasing demand for chips across multiple sectors.

Biocon Ltd announced that it has signed a licensing and supply agreement with Tabuk Pharmaceutical Manufacturing Company to market its 'GLP-1' products aimed at treating diabetes and managing chronic weight in certain Middle Eastern countries.

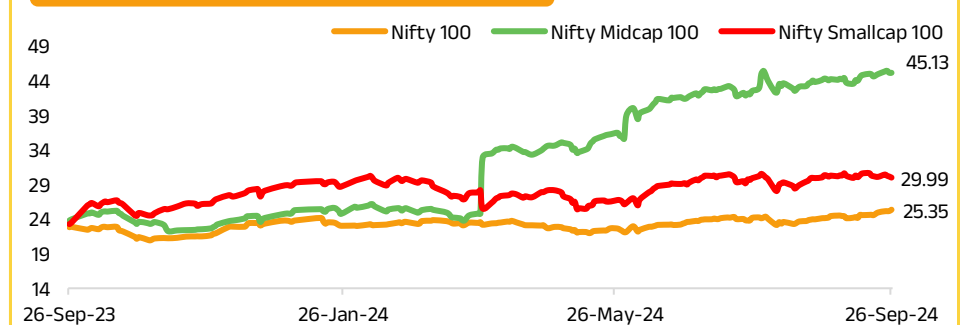
Zetwerk Manufacturing has secured a contract from NTPC, a state-owned company, to supply solar modules for a project in Gujarat. This order includes the production and supply of 1,515 MWp of 'Made in India' solar photovoltaic modules that meet ALMM standards, plus necessary spare parts, for the Khavda Solar project, which has a total capacity of 1,200 MW.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



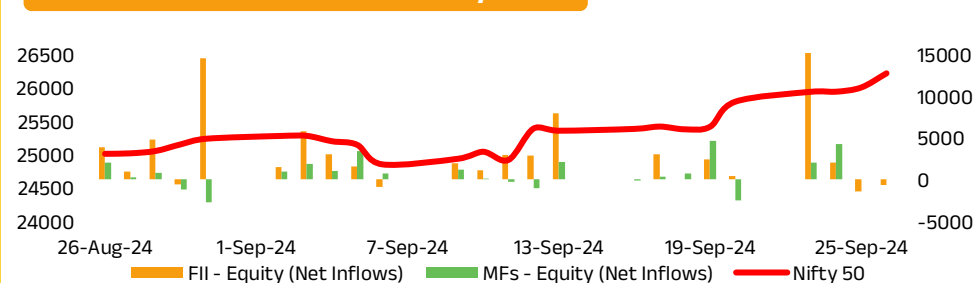
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-636.66	48,822	88,507	91,707
MF**	4267.12	19,407	71,694	263,120
DII	2405.12	18,328	90,092	326,219

Source: SEBI, NSDL;**As on 24th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	26226.50	25998.20	0.88%
Near Basis	10.45	-5.95	-275.63%
Mid Futures	26308.80	26126.70	0.70%
Mid Basis	92.80	122.55	-24.28%
Near Open Interest (Cr.)	0.46	0.67	-31.21%
Mid Open Interest (Cr.)	1.60	1.14	40.16%
Rollover (%)	78.77	64.59	21.96%
Put Call Ratio (OI)	1.32	1.33	-0.21%
Put Call Ratio(Vol)	1.03	1.01	2.08%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	9720	10400	46283
Index Options	3379122	3436001	509582
Stock Futures	105329	108381	348971
Stock Options	41096	39264	61967
Total	3535267	3594046	966803

Source: NSE

Global Equity Market

Global Indices	26-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3136.32	0.42%	0.50%	2.31%
Nasdaq 100 (U.S.)	20115.54	0.72%	1.39%	3.07%
FTSE (U.K.)	8284.91	0.20%	-0.53%	-0.51%
DAX Index (Germany)	19238.36	1.69%	1.24%	3.34%
CAC 40 Index (France)	7742.09	2.33%	1.66%	2.00%
SSE Composite (China)	3000.95	3.61%	9.68%	5.09%
Nikkei (Japan)	38925.63	2.79%	4.76%	2.14%
Kospi (South Korea)	2671.57	2.90%	3.52%	-0.98%
HangSeng (Hong Kong)	19924.58	4.16%	10.61%	11.94%
Strait Times (Singapore)	3582.23	-0.03%	-1.40%	5.48%
Ibovespa Sao Paulo (Brazil)	133009.78	1.08%	-0.08%	-2.83%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8203.70	0.95%	0.14%	1.47%
Jakarta Composite (Indonesia)	7744.52	0.05%	-2.03%	1.82%
KLSE (Malaysia)	1671.32	-0.12%	0.34%	1.97%

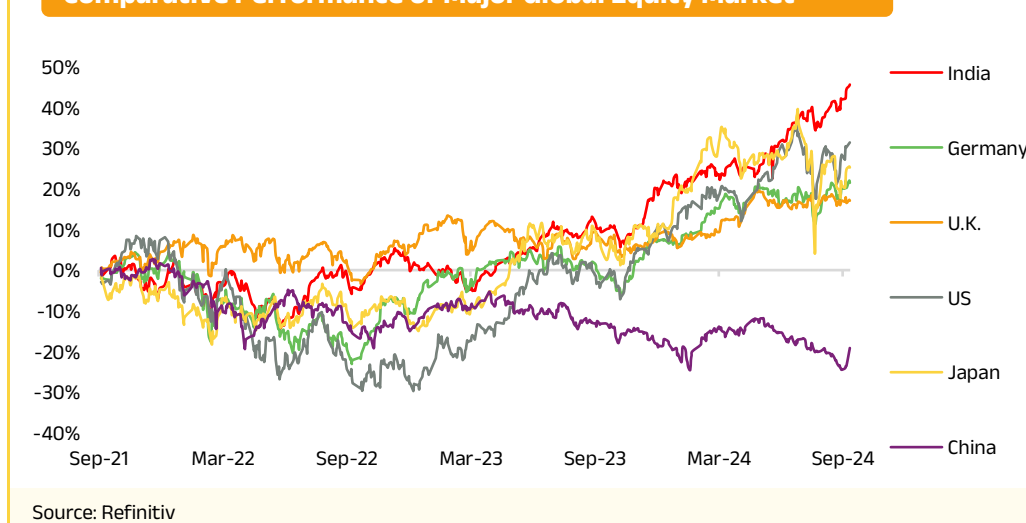
Source: Refinitiv, Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

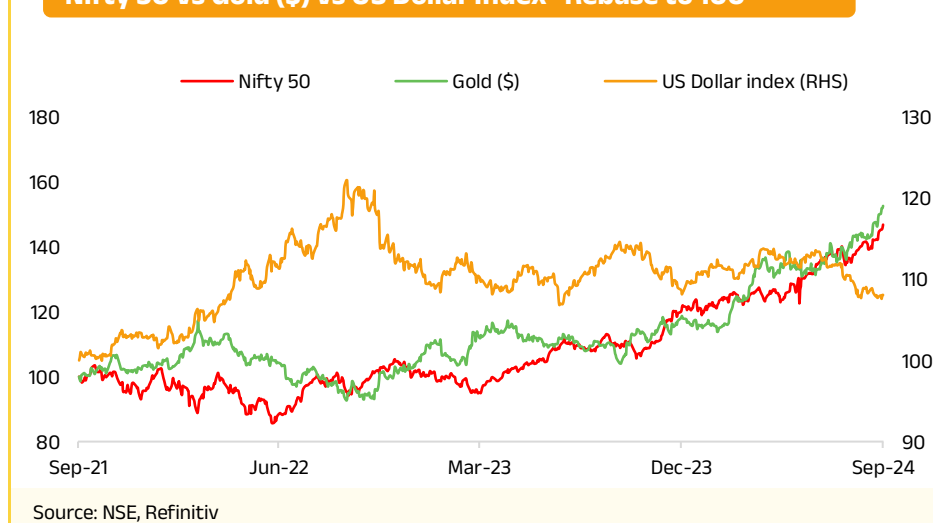
Commodity Prices	26-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	75,402	0.50%	2.89%	6.06%
Gold (\$/oz)	2,670.20	0.50%	3.24%	6.09%
Silver (INR/1 kg)	91,978	1.65%	3.83%	9.20%
Silver (\$/oz)	32.02	0.57%	4.03%	7.11%
Brent Crude(\$/bbl)	74.00	-3.47%	-5.33%	-10.32%
Crude Oil (INR/1 bbl)	5,822.00	-2.72%	-2.05%	-7.23%
NYMEX Crude(\$/bbl)	68.18	-2.84%	-6.29%	-12.92%
Natural Gas (INR/1 mmbtu)	220.30	3.28%	15.04%	29.89%
Aluminium (INR/1 kg)	236.50	1.28%	1.05%	1.81%
Copper (INR/1 kg)	852.60	1.50%	4.17%	6.04%
Nickel (INR/1 kg)	1,405.00	0.06%	0.98%	-1.08%
Lead (INR/1 kg)	190.35	-2.88%	-2.63%	-2.96%
Zinc (INR/1 kg)	281.30	1.74%	2.93%	2.61%
Mentha Oil (INR/1 kg)	993.40	1.20%	-0.01%	-2.62%
Baltic Dry Index ⁽¹⁾	2,016	0.10%	2.02%	14.42%

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



Speculative Shares

Definition: Speculation is the practice of engaging in a transaction in which an investor puts his money in a risky financial instrument with the objective of generating significant returns from it. Speculative share or a speculative stock can thus be defined as one that contains a very high element of risk. Such stocks usually trade at very low prices but at times can fluctuate considerably and provide windfall gains (and losses as well) to an investor.



Explanation

Since speculative shares normally trade at very low prices, a trader can buy such stocks in considerable volume. If the stock moves up even marginally, then also the investor can book windfall gains by selling it in the market. It needs to be noted that speculative stocks tend to outperform in bull markets and underperform in bearish market. Speculative stocks often account for a very small portion of the portfolio of experienced investors as they can boost the returns within a short span of time.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.62	20.53	39.60	15.63
Mid Cap Fund	3.15	29.74	51.66	23.91
Large & Mid Cap Fund	3.34	25.65	46.88	20.24
Small Cap Fund	2.84	30.55	48.11	24.86
Multi Cap Fund	3.34	26.18	46.93	21.39
Focused Fund	3.95	23.76	43.30	17.64
Value Fund	2.61	23.82	48.69	22.30
Contra Fund	3.55	26.38	51.79	24.51
ELSS	3.20	24.12	42.71	19.55
Equity Savings	1.47	9.34	16.93	9.26
Arbitrage Fund	0.53	3.78	7.35	5.74
Dividend Yield Fund	2.15	24.20	48.86	22.88
Aggressive Hybrid Fund	2.87	18.83	34.32	15.21
Balanced Advantage	2.00	13.43	26.41	12.60

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 25 Sep, 2024

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