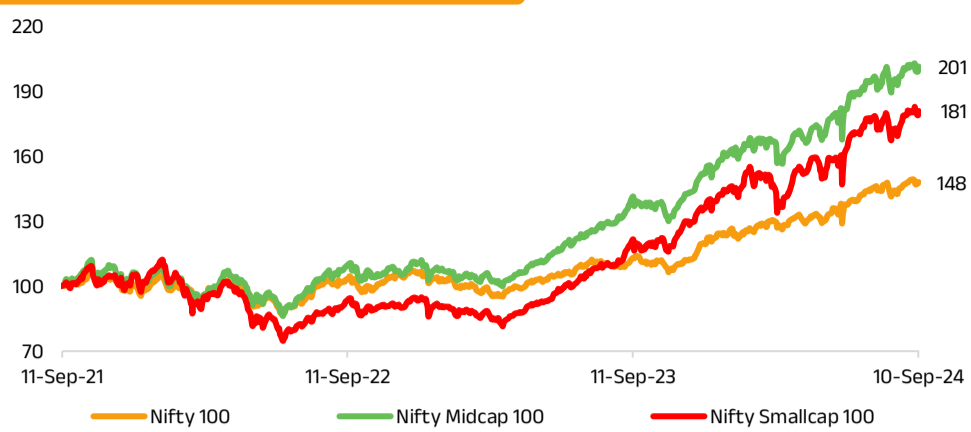


Broad Indices Historical Movement



Source: NSE

Broad Indices

	10-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,041.10	0.42%	-0.94%	2.76%
Nifty 100	26,115.20	0.40%	-0.86%	2.71%
Nifty 200	14,213.50	0.53%	-0.79%	2.80%
Nifty 500	23,643.65	0.60%	-0.61%	3.14%
Nifty Large Midcap 250	16,491.55	0.74%	-0.57%	3.01%
Nifty Midcap 150	21,853.55	1.07%	-0.27%	3.32%
Nifty Next 50	74,737.60	0.22%	-0.90%	2.78%
Nifty Smallcap 250	18,383.00	1.25%	0.65%	6.04%

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

Smart Beta Index

Index	10-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,012.30	0.71%	-2.52%	0.50%
NIFTY 500 Value 50	14,856.41	0.28%	-3.26%	-0.27%
Nifty 200 Quality 30	23,012.20	0.90%	0.22%	5.40%
Nifty 50 Equal Weight	32,228.30	0.39%	-0.96%	3.41%
NIFTY Alpha Low Volatility 30	30,060.35	0.45%	-0.83%	2.13%
Nifty High Beta 50	4,054.89	1.00%	-2.60%	-1.23%
Nifty Low Volatility 50	25,759.98	0.20%	0.03%	4.23%
Nifty Midcap150 Momentum 50	64,701.95	0.69%	-1.92%	2.43%
Nifty PSE	10,929.50	0.32%	-4.36%	-3.33%
Nifty SME Emerge	16,266.78	0.12%	1.31%	8.87%
Nifty 100 ESG	5,060.80	0.40%	-0.71%	4.16%

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

Sector Indices

Index	10-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	25,556.45	0.24%	-1.84%	0.83%
Nifty Bank	51,272.30	0.30%	-0.81%	1.56%
Nifty Consumption	12,260.00	0.70%	1.44%	4.65%
Nifty Financial	23,649.40	-0.31%	-1.14%	2.90%
Nifty FMCG	64,584.95	0.18%	1.73%	3.91%
Nifty Healthcare	14,554.05	1.02%	1.10%	4.40%
Nifty IT	42,644.20	1.73%	-0.48%	9.22%
Nifty Media	2,107.35	2.69%	2.08%	0.27%
Nifty Metal	9,156.20	0.63%	-1.06%	1.30%
Nifty MNC	31,059.55	0.58%	0.17%	1.93%
Nifty Pharma	23,256.85	1.08%	1.05%	4.72%
Nifty Realty	1,038.75	0.88%	-0.64%	1.61%
Nifty Energy	42,243.40	0.76%	-2.84%	-2.25%

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

Nifty 50 Top 5 Gainers

Company	10-Sep-24	Prev_Day	% Change	1 Week
Divi's Lab	5,426.45	5,173.50	4.89	7.12
United Phos	619.20	604.40	2.45	2.82
Bharti Airtel	1,577.85	1,542.65	2.28	1.11
Wipro	525.75	514.85	2.12	-1.92
HCL Tech	1,779.10	1,746.75	1.85	-0.63

Source: NSE

Nifty 50 Top 5 Losers

Company	10-Sep-24	Prev_Day	% Change	1 Week
HDFC Standard Life Insurance Company SBI Life Insurance Company Limited	702.90	736	-4.47	-7.36
Bajaj Finance	1,853.45	1,902	-2.54	-3.90
Hero Moto	7,241.85	7,347	-1.44	-1.52
ONGC	5,669.70	5,745	-1.32	0.41
ONGC	295.60	299	-1.10	-8.26

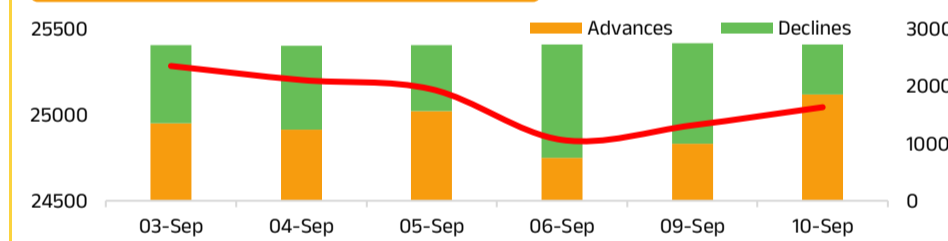
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

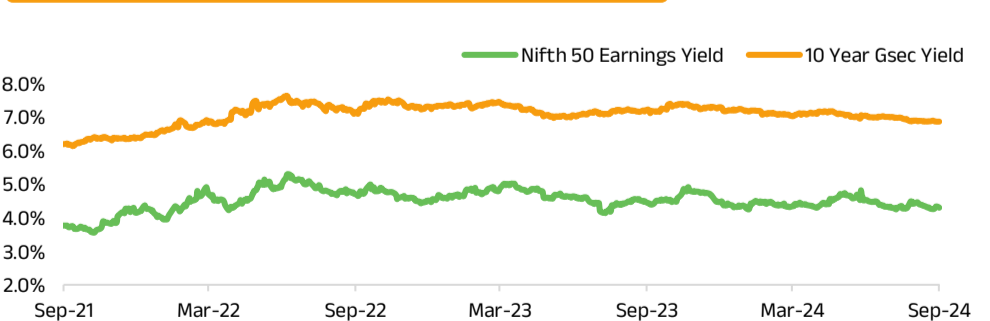
Indian equity markets extended its gains for the second consecutive day supported by a rally in U.S. equity markets overnight amid hopes of a potential rate cut by the U.S. Federal Reserve next week. However, gains were restricted as investors remained cautious ahead of release of the key U.S. inflation readings of Aug 2024.

L&T Semiconductor Technologies, the semiconductor division of infrastructure leader Larsen & Toubro, announced a partnership with IBM, a major US computing firm, to develop advanced processors.

Coal India Ltd. (CIL) intends to invest approximately 670 billion rupees (\$8 billion) in the construction of coal-fired power plants in proximity to its mining operations, signalling the fast-growing economy will remain reliant on fossil fuels for decades to come.

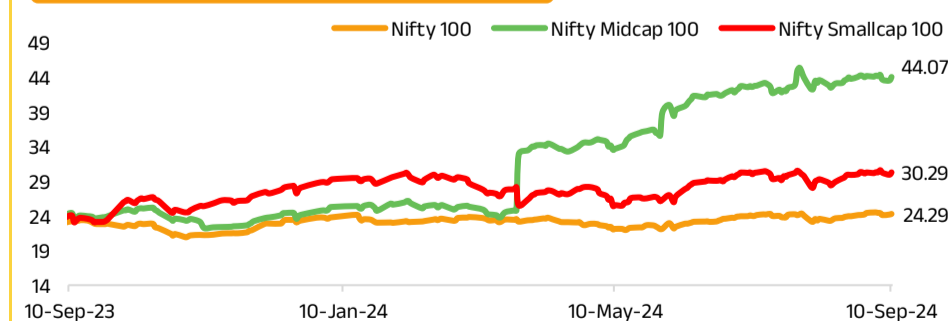
JSW Energy announced that its subsidiary, JSW Neo Energy, has secured a 600 MW wind-solar hybrid power project from the Maharashtra State Electricity Distribution Company (MSEDCL).

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



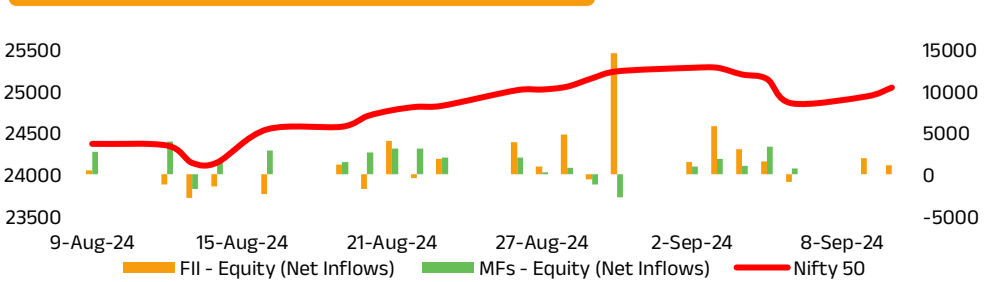
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	INR Cr.
				YTD
FII	1134.37	14,059	53,744	56,944
MF**	727.91	7,895	60,181	251,607
DII	-275.37	8,924	80,689	316,816

Source: SEBI, NSDL; **As on 6th Sep 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25083.00	24985.00	0.39%
Near Basis	41.90	48.60	-13.79%
Mid Futures	25212.50	25113.50	0.39%
Mid Basis	171.35	177.10	-3.25%
Near Open Interest (Cr.)	1.33	1.37	-3.10%
Mid Open Interest (Cr.)	0.11	0.11	-0.77%
Rollover (%)	9.57	9.35	2.36%
Put Call Ratio (OI)	1.07	0.96	11.17%
Put Call Ratio(Vol)	0.95	0.85	11.41%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2478	2851	36400
Index Options	2303794	2303183	444728
Stock Futures	24998	27560	328547
Stock Options	42146	44458	39746
Total	2373416	2378052	849422

Source: NSE

Global Equity Market

Global Indices	10-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2995.66	0.41%	-0.69%	2.75%
Nasdaq 100 (U.S.)	18829.14	0.90%	-0.68%	1.71%
FTSE (U.K.)	8205.98	-0.78%	-1.11%	0.46%
DAX Index (Germany)	18265.92	-0.96%	-2.57%	3.06%
CAC 40 Index (France)	7407.55	-0.24%	-2.21%	1.90%
SSE Composite (China)	2744.19	0.28%	-2.10%	-4.12%
Nikkei (Japan)	36159.16	-0.16%	-6.53%	3.24%
Kospi (South Korea)	2523.43	-0.49%	-5.30%	-2.51%
HangSeng (Hong Kong)	17234.09	0.22%	-2.36%	0.84%
Strait Times (Singapore)	3512.67	0.46%	0.93%	7.69%
Ibovespa Sao Paulo (Brazil)	134319.58	-0.31%	-0.03%	2.84%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8011.90	0.30%	-1.13%	3.01%
Jakarta Composite (Indonesia)	7761.39	0.76%	1.90%	6.95%
KLSE (Malaysia)	1660.35	0.54%	-0.97%	4.03%

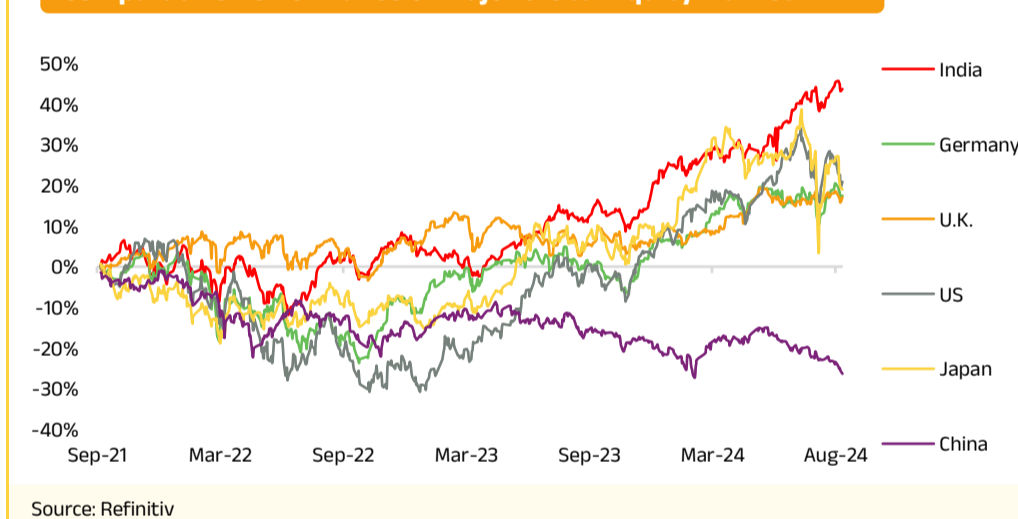
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

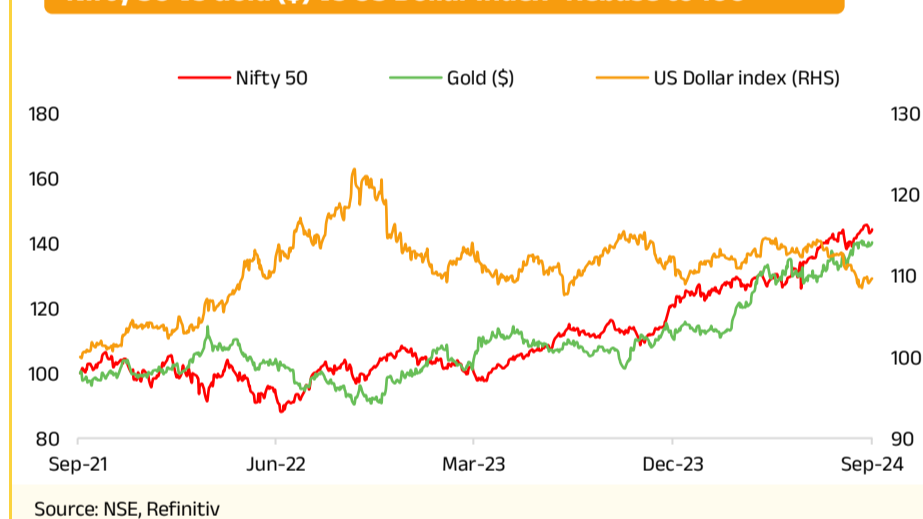
Commodity Prices	10-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,352	0.41%	0.31%	3.06%
Gold (\$/oz)	2,516.12	0.43%	0.94%	3.50%
Silver (INR/1 kg)	82,054	0.90%	0.01%	2.58%
Silver (\$/oz)	28.38	0.11%	1.18%	3.42%
Brent Crude(\$/bbl)	72.58	-2.72%	-7.78%	-11.78%
Crude Oil (INR/1 bbl)	5,768.00	1.55%	-6.50%	-9.83%
NYMEX Crude(\$/bbl)	66.63	-4.20%	-6.39%	-14.72%
Natural Gas (INR/1 mmbtu)	182.20	-4.56%	2.13%	2.02%
Aluminium (INR/1 kg)	220.65	0.14%	-1.78%	2.63%
Copper (INR/1 kg)	790.65	-0.09%	0.91%	1.37%
Nickel (INR/1 kg)	1,348.50	-0.39%	-3.68%	-2.30%
Lead (INR/1 kg)	183.00	-7.11%	-1.93%	-4.94%
Zinc (INR/1 kg)	255.30	-1.75%	-3.71%	-1.45%
Mentha Oil (INR/1 kg)	993.00	-0.83%	-0.91%	-1.03%
Baltic Dry Index ^[1]	1,958	0.88%	0.56%	17.25%

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	2.98	14.70	33.32	15.26
Mid Cap Fund	4.00	25.14	44.56	23.55
Large & Mid Cap Fund	3.73	20.29	39.96	19.88
Small Cap Fund	5.49	26.20	42.55	25.09
Multi Cap Fund	4.09	20.82	40.52	21.35
Focused Fund	4.25	18.67	36.39	17.23
Value Fund	3.37	17.88	42.96	22.15
Contra Fund	3.43	19.81	45.26	24.18
ELSS	3.73	18.83	36.76	19.34
Equity Savings	1.45	7.56	15.17	9.16
Arbitrage Fund	0.59	3.65	7.36	5.70
Dividend Yield Fund	2.42	17.67	43.64	22.67
Aggressive Hybrid Fund	2.84	14.59	29.38	14.89
Balanced Advantage	2.11	10.37	23.02	12.29

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 09 Sep, 2024

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