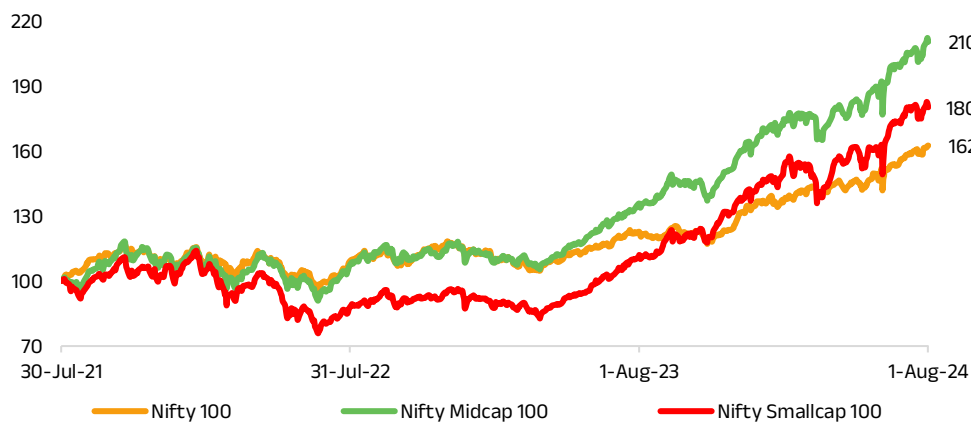


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 1-Aug-24 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|--------|--------|---------|
| Nifty 50 | 25,010.90 | 0.24% | 2.48% | 3.60% |
| Nifty 100 | 26,057.80 | 0.12% | 2.56% | 3.59% |
| Nifty 200 | 14,165.80 | -0.04% | 2.64% | 3.64% |
| Nifty 500 | 23,506.60 | -0.10% | 2.57% | 3.43% |
| Nifty Large Midcap 250 | 16,418.00 | -0.29% | 2.76% | 3.40% |
| Nifty Midcap 150 | 21,706.45 | -0.71% | 2.97% | 3.22% |
| Nifty Next 50 | 74,294.65 | -0.66% | 2.89% | 2.91% |
| Nifty Smallcap 250 | 17,825.05 | -0.69% | 1.95% | 2.63% |

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

Smart Beta Index

| Index | 1-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index | 36,792.70 | -0.59% | 4.37% | 3.15% |
| NIFTY 500 Value 50 | 15,600.77 | -0.10% | 3.90% | 5.42% |
| Nifty 200 Quality 30 | 22,227.20 | -0.21% | 2.34% | 6.20% |
| Nifty 50 Equal Weight | 32,047.65 | 0.34% | 3.30% | 5.45% |
| NIFTY Alpha Low Volatility 30 | 29,930.80 | 0.27% | 2.93% | 6.43% |
| Nifty High Beta 50 | 4,296.70 | -1.23% | 3.88% | 1.91% |
| Nifty Low Volatility 50 | 25,236.72 | 0.18% | 2.32% | 5.81% |
| Nifty Midcap150 Momentum 50 | 65,286.65 | -0.54% | 3.35% | 3.41% |
| Nifty PSE | 11,737.35 | 0.45% | 4.45% | 9.37% |
| Nifty SME Emerge | 14,756.66 | -1.54% | -1.13% | 1.59% |
| Nifty 100 ESG | 4,996.65 | 0.03% | 2.72% | 4.46% |

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

Sector Indices

| Index | 1-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 26,487.45 | -0.74% | 3.36% | 4.59% |
| Nifty Bank | 51,564.00 | 0.02% | 1.33% | -1.92% |
| Nifty Consumption | 11,833.00 | 0.23% | 2.56% | 5.74% |
| Nifty Financial | 23,435.85 | 0.10% | 1.68% | -0.83% |
| Nifty FMCG | 62,173.20 | 0.15% | 0.05% | 8.78% |
| Nifty Healthcare | 13,787.25 | 0.27% | 3.36% | 9.46% |
| Nifty IT | 40,709.40 | -0.35% | 1.63% | 10.42% |
| Nifty Media | 2,109.15 | -1.89% | 3.32% | 3.36% |
| Nifty Metal | 9,573.20 | -0.11% | 4.65% | -3.13% |
| Nifty MNC | 31,189.65 | -0.37% | 2.00% | 1.70% |
| Nifty Pharma | 21,790.35 | 0.06% | 3.24% | 10.28% |
| Nifty Realty | 1,075.15 | -1.70% | 0.92% | -2.35% |
| Nifty Energy | 44,954.45 | 1.97% | 5.11% | 8.14% |

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

Nifty 50 Top 5 Gainers

| Company | 1-Aug-24 | Prev_Day | % Change | 1 Week |
|------------|-----------|-----------|----------|--------|
| Power Grid | 361.10 | 348.20 | 3.70 | 6.38 |
| Coal India | 540.40 | 522.20 | 3.49 | 9.39 |
| ONGC | 341.75 | 334.20 | 2.26 | 1.77 |
| Dr.Reddy | 6,887.95 | 6,750.50 | 2.04 | 0.51 |
| Maruti | 13,359.05 | 13,115.80 | 1.85 | 6.79 |

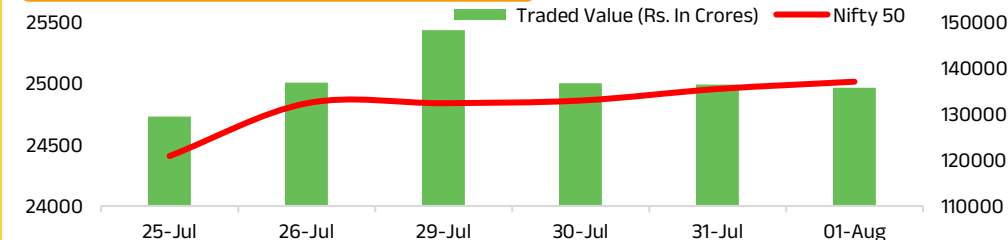
Source: NSE

Nifty 50 Top 5 Losers

| Company | 1-Aug-24 | Prev_Day | % Change | 1 Week |
|-------------|----------|----------|----------|--------|
| M&M | 2,828.40 | 2908 | -2.73 | 0.60 |
| Hero Moto | 5,371.85 | 5488 | -2.12 | -0.58 |
| United Phos | 560.45 | 572 | -2.03 | 5.86 |
| SBI | 862.65 | 872 | -1.12 | 1.67 |
| Indian Oil | 179.73 | 182 | -1.07 | 1.63 |

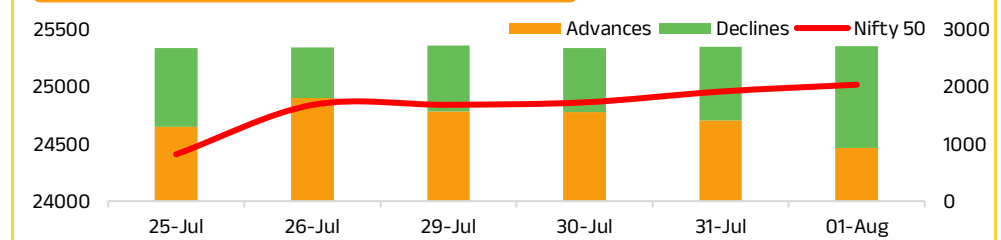
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

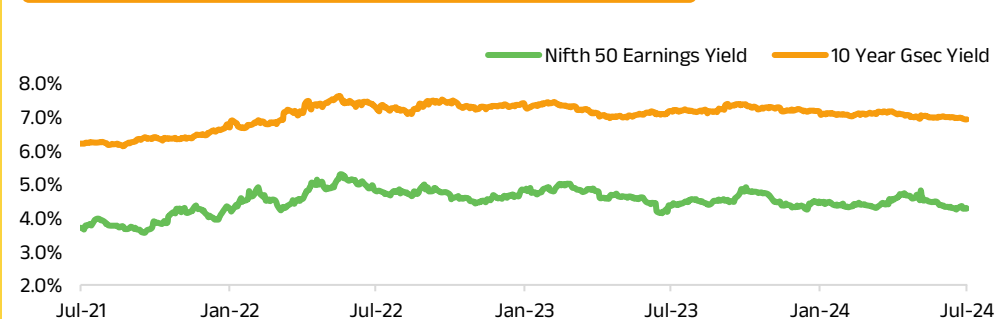
Indian equity markets continued its winning streak for the fifth consecutive session amid positive global cues. The key benchmark indices reached fresh high as sentiments were boosted following the dovish comment from the U.S. Federal Reserve's latest monetary policy meeting.

ITC announced a slight increase in its standalone net profit for the quarter ending on Jun 30, 2024, reaching Rs 4,917.45 crore compared to Rs 4,902.74 crore in the same period last year. The profit after tax fell short of the Street's expectations of Rs 5,122 crore.

Tata Motors announced a significant 74% YoY increase in its consolidated net profit to Rs 5,566 crore for Q1FY25. The profit is marginally higher than the Street estimate of Rs 5,486 crore. Revenue from operations during the first quarter rose 6% YoY to Rs 1.08 lakh crore but was below the Street estimate of Rs 1.15 lakh crore.

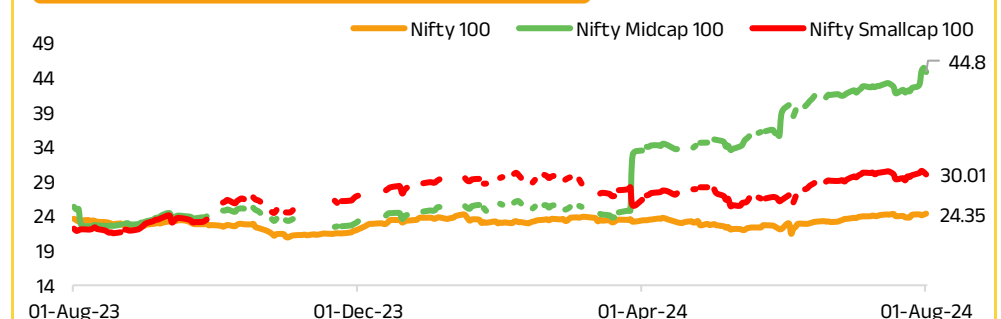
Sun Pharma announced a 40% increase YoY in net profit to Rs 2,836 crore in Q1FY25 compared to the previous year, driven by strong sales growth in domestic formulation, emerging markets, and global specialty portfolio. The company reported net profit of Rs 2,023 crore during the corresponding quarter of the previous year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



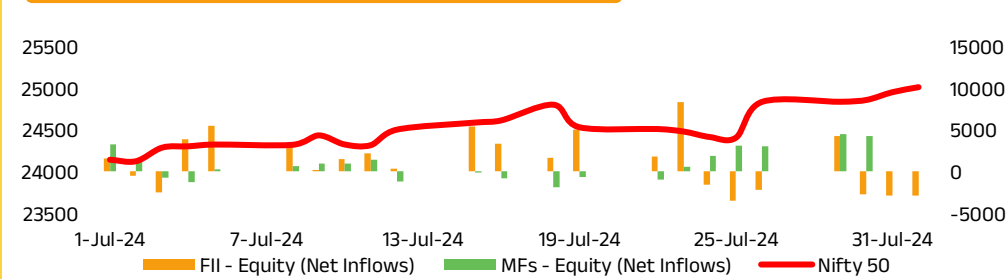
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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 | -2853.76 | -2,854 | 29,511 | 32,712 |
| MF** | 4251.79 | | 18,494 | 209,920 |
| DII | -337.03 | -337 | 23,149 | 259,276 |

Source: SEBI, NSDL;**As on 30th Jul 2024;

F&O Trends

| | Latest | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures | 25032.30 | 25013.20 | 0.08% |
| Near Basis | 21.35 | 62.00 | -65.56% |
| Mid Futures | 25147.60 | 25133.00 | 0.06% |
| Mid Basis | 136.70 | 181.80 | -24.81% |
| Near Open Interest (Cr.) | 1.57 | 1.54 | 1.72% |
| Mid Open Interest (Cr.) | 0.11 | 0.10 | 6.30% |
| Rollover (%) | 7.43 | 7.09 | 4.84% |
| Put Call Ratio (OI) | 1.07 | 1.28 | -16.69% |
| Put Call Ratio(Vol) | 1.09 | 0.89 | 22.11% |

Source: NSE

FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 2551 | 3818 | 32644 |
| Index Options | 3723902 | 3681431 | 353451 |
| Stock Futures | 31663 | 32302 | 321116 |
| Stock Options | 39560 | 41061 | 33790 |
| Total | 3797675 | 3758613 | 741001 |

Source: NSE

Global Equity Market

| Global Indices | 1-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.) | 2972.36 | -1.43% | 0.80% | -0.28% |
| Nasdaq 100 (U.S.) | 18890.39 | -2.44% | 0.32% | -4.65% |
| FTSE (U.K.) | 8283.36 | -1.01% | 1.19% | 1.43% |
| DAX Index (Germany) | 18083.05 | -2.30% | -1.18% | -1.14% |
| CAC 40 Index (France) | 7370.45 | -2.14% | -0.76% | -2.52% |
| SSE Composite (China) | 2932.39 | -0.22% | 1.58% | -2.08% |
| Nikkei (Japan) | 38126.33 | -2.49% | 0.68% | -3.80% |
| Kospi (South Korea) | 2777.68 | 0.25% | 2.47% | -0.95% |
| HangSeng (Hong Kong) | 17304.96 | -0.23% | 1.76% | -2.33% |
| Strait Times (Singapore) | 3419.84 | -1.04% | -0.31% | 2.43% |
| Ibovespa Sao Paulo (Brazil) | 127395.10 | -0.20% | 1.14% | 2.15% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8114.70 | 0.28% | 3.22% | 4.70% |
| Jakarta Composite (Indonesia) | 7325.98 | 0.97% | 1.18% | 2.61% |
| KLSE (Malaysia) | 1624.25 | -0.08% | 0.56% | 1.63% |

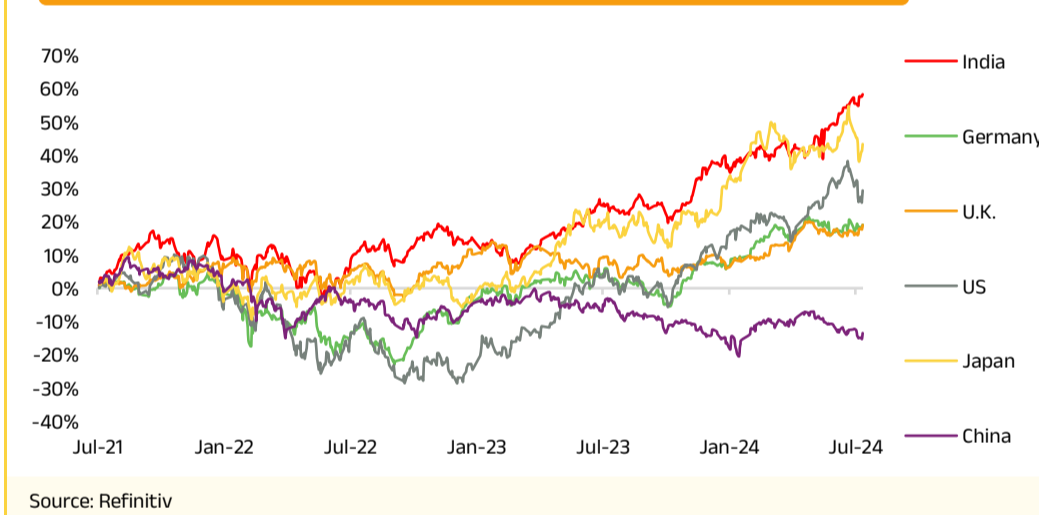
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

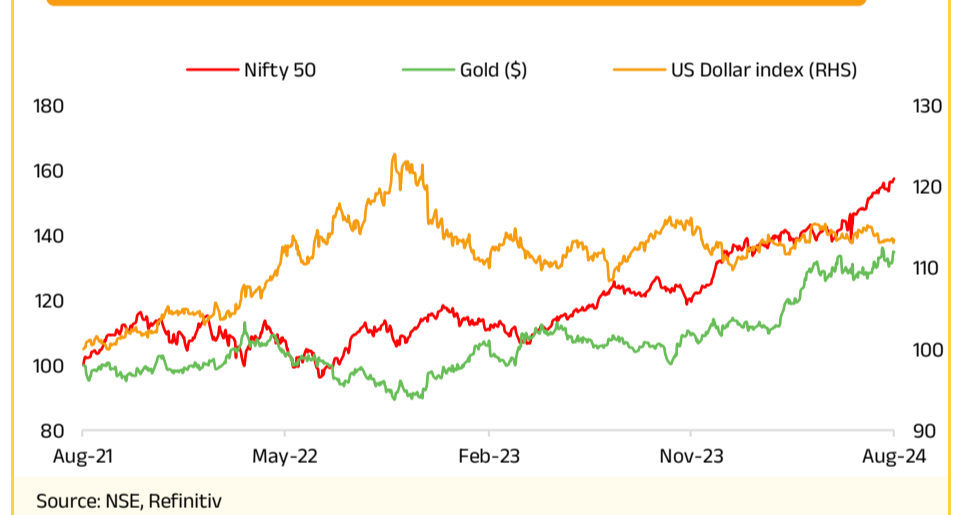
| Commodity Prices | 1-Aug-24 | 1 Day | 1 Week | 1 Month |
|---------------------------------|----------|--------|--------|---------|
| Gold (INR/10 gm) | 69,405 | 0.52% | 2.09% | -2.95% |
| Gold (\$/oz) | 2,445.42 | -0.11% | 3.42% | 4.88% |
| Silver (INR/1 kg) | 83,400 | 0.70% | 2.34% | -4.84% |
| Silver (\$/oz) | 28.55 | -1.69% | 2.08% | -3.02% |
| Brent Crude(\$/bbl) | 82.76 | -0.02% | -1.68% | -6.02% |
| Crude Oil (INR/1 bbl) | 6,524.00 | 4.27% | 0.45% | -4.13% |
| NYMEX Crude(\$/bbl) | 77.59 | -2.05% | -2.13% | -8.29% |
| Natural Gas (INR/1 mmbtu) | 170.50 | -4.21% | -3.78% | -21.46% |
| Aluminium (INR/1 kg) | 213.00 | 0.85% | -0.26% | -8.97% |
| Copper (INR/1 kg) | 802.60 | 0.41% | 1.53% | -4.65% |
| Nickel (INR/1 kg) | 1,381.50 | 0.09% | 4.07% | -5.75% |
| Lead (INR/1 kg) | 194.00 | -0.77% | 0.36% | -2.19% |
| Zinc (INR/1 kg) | 256.90 | 0.51% | 0.29% | -6.53% |
| Mentha Oil (INR/1 kg) | 985.90 | 1.09% | 1.67% | 5.15% |
| Baltic Dry Index ^[1] | 1,708 | -3.06% | -6.87% | -20.85% |

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 | 3.49 | 19.03 | 35.08 | 18.11 |
| Mid Cap Fund | 2.92 | 25.73 | 51.71 | 24.64 |
| Large & Mid Cap Fund | 2.95 | 22.43 | 43.59 | 21.71 |
| Small Cap Fund | 2.69 | 20.31 | 47.47 | 25.17 |
| Multi Cap Fund | 3.14 | 21.42 | 45.28 | 22.71 |
| Focused Fund | 3.03 | 20.35 | 37.87 | 19.17 |
| Value Fund | 4.03 | 21.20 | 46.93 | 23.62 |
| Contra Fund | 4.47 | 23.23 | 49.21 | 25.78 |
| ELSS | 2.81 | 19.88 | 39.76 | 20.96 |
| Equity Savings | 1.52 | 8.18 | 15.71 | 9.82 |
| Arbitrage Fund | 0.63 | 3.63 | 7.55 | 5.54 |
| Dividend Yield Fund | 5.45 | 22.36 | 48.73 | 24.77 |
| Aggressive Hybrid Fund | 2.74 | 16.69 | 30.94 | 16.41 |
| Balanced Advantage | 2.36 | 12.07 | 24.59 | 13.04 |

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 31 Jul, 2024

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