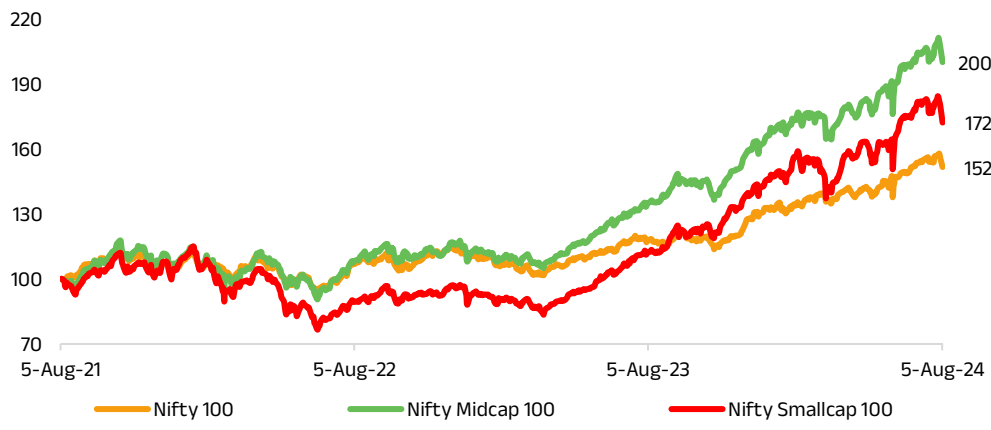


Broad Indices Historical Movement



Source: NSE

Broad Indices

	5-Aug-24	1 Day	1 Week	1 Month
Nifty 50	24,055.60	-2.68%	-3.14%	-1.10%
Nifty 100	25,043.05	-2.83%	-3.32%	-1.37%
Nifty 200	13,600.20	-2.95%	-3.47%	-1.50%
Nifty 500	22,542.45	-3.08%	-3.64%	-1.94%
Nifty Large Midcap 250	15,730.95	-3.18%	-3.76%	-2.13%
Nifty Midcap 150	20,734.85	-3.52%	-4.20%	-2.89%
Nifty Next 50	70,936.90	-3.26%	-4.51%	-3.39%
Nifty Smallcap 250	16,937.90	-4.18%	-5.04%	-4.37%

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

Smart Beta Index

Index	5-Aug-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	34,620.15	-3.70%	-5.51%	-5.03%
NIFTY 500 Value 50	14,665.87	-4.12%	-4.97%	-2.79%
Nifty 200 Quality 30	21,530.90	-1.82%	-2.83%	1.19%
Nifty 50 Equal Weight	30,792.45	-2.52%	-2.94%	0.35%
NIFTY Alpha Low Volatility 30	28,897.75	-2.19%	-2.37%	0.91%
Nifty High Beta 50	4,040.83	-4.89%	-6.30%	-6.41%
Nifty Low Volatility 50	24,490.46	-1.83%	-1.97%	1.68%
Nifty Midcap150 Momentum 50	61,646.85	-3.98%	-5.22%	-5.06%
Nifty PSE	11,088.70	-3.83%	-3.89%	-0.06%
Nifty SME Emerge	14,430.32	-2.35%	-4.43%	-6.91%
Nifty 100 ESG	4,798.85	-2.79%	-3.33%	-0.50%

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

Sector Indices

Index	5-Aug-24	1 Day	1 Week	1 Month
Nifty Auto	24,706.50	-3.92%	-6.51%	-2.72%
Nifty Bank	50,092.10	-2.45%	-2.56%	-4.88%
Nifty Consumption	11,539.75	-1.78%	-1.80%	2.85%
Nifty Financial	22,762.70	-2.58%	-2.37%	-3.72%
Nifty FMCG	61,550.45	-0.32%	-1.54%	6.72%
Nifty Healthcare	13,607.20	-1.66%	-0.86%	4.87%
Nifty IT	38,435.95	-3.26%	-5.84%	1.90%
Nifty Media	2,004.20	-4.58%	-5.15%	-2.12%
Nifty Metal	8,862.50	-4.85%	-6.22%	-11.11%
Nifty MNC	30,018.70	-1.94%	-3.57%	-2.98%
Nifty Pharma	21,583.05	-1.46%	-0.42%	5.52%
Nifty Realty	992.30	-4.32%	-9.22%	-11.33%
Nifty Energy	42,640.90	-3.82%	-1.84%	0.28%

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

Nifty 50 Top 5 Gainers

Company	5-Aug-24	Prev_Day	% Change	1 Week
HUL	2,715.90	2,692.55	0.87	0.16
HDFC Standard Life Insurance Company Limited	710.90	707.40	0.49	2.02
Tata Beverages	1,199.40	1,193.65	0.48	-0.17
NA	NA	NA	NA	NA
NA	NA	NA	NA	NA

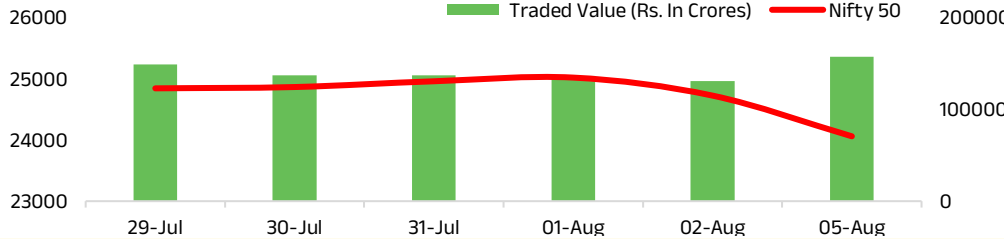
Source: NSE

Nifty 50 Top 5 Losers

Company	5-Aug-24	Prev_Day	% Change	1 Week
Tata Motors	1,016.45	1097	-7.31	-9.57
ONGC	310.25	330	-6.01	-6.80
Adani Ports & SEZ	1,493.85	1588	-5.93	-3.54
Hindalco	614.30	648	-5.21	-7.88
Power Grid	342.80	358	-4.31	0.13

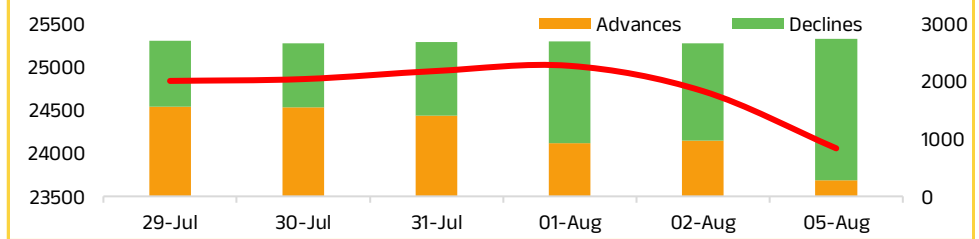
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

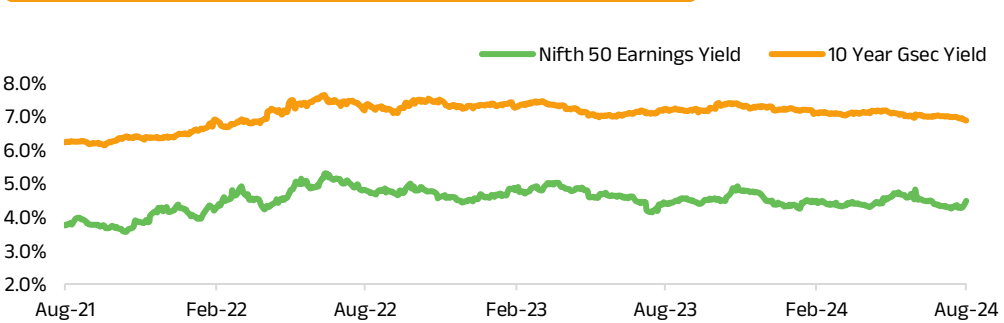
Indian equity markets fell sharply tracking weak global markets due to weak U.S. jobs data for the month of Jul, 2024 and escalating tensions in the Middle East, which have dampened investors' willingness to take risks. Indian real estate stocks were heavily impacted by the market downturn, with investors worried about a potential economic slowdown in the U.S. leading to decreased demand for real estate.

State Bank of India (SBI) announced a standalone net profit of Rs 17,035 crore for the quarter ended on Jun 30, 2024. This marked a 0.9% increase from the Rs 16,884.29 crore reported in the same period last year. The interest earned during the reported quarter stood at Rs 1,11,526 crore.

Marico, the Indian company known for its Saffola and Parachute packaged oil brands, announced Q1FY25 profit that exceeded expectations, driven by consistent demand, and indicated that its earnings are projected to rise this year. The company's consolidated net profit rose 8.7% to Rs 464 crore in Q1FY25.

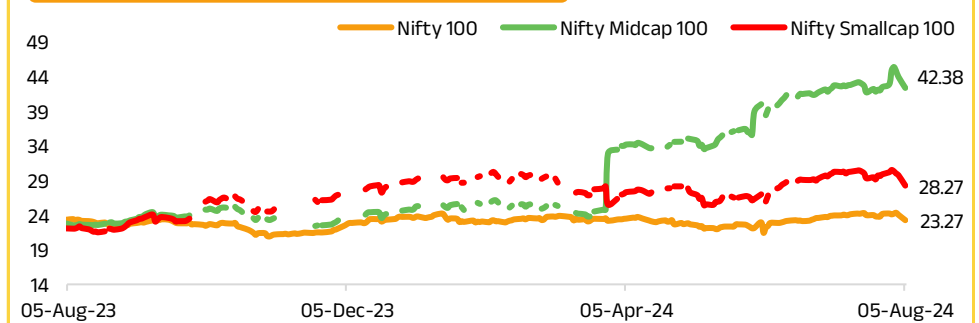
Bharti Airtel reported a significant 158% increase in its consolidated net profit to Rs 4,160 crore for the first quarter ended on June 30, 2024. The profit exceeded the expectations of analysts by a considerable margin. Revenue from operations for the reporting period increased 3% YoY to Rs 38,506 crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



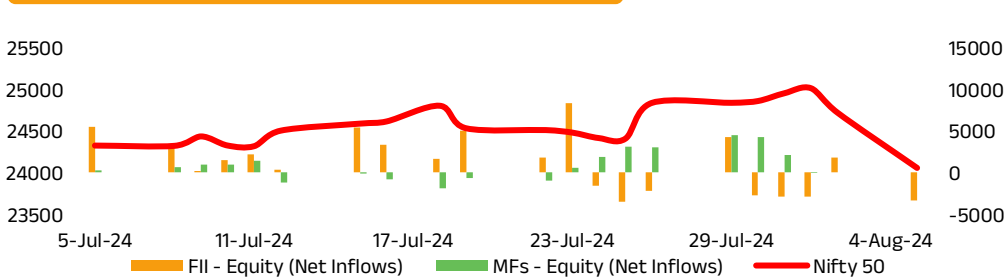
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-3367.22	-4,395	27,970	31,171
MF**	-48.54	-49	20,553	211,979
DII	9155.55	11,784	35,270	271,398

Source: SEBI, NSDL;**As on 1st Aug 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24103.00	24711.50	-2.46%
Near Basis	47.35	-6.15	-869.92%
Mid Futures	24231.20	24835.80	-2.43%
Mid Basis	175.55	118.10	48.65%
Near Open Interest (Cr.)	1.47	1.52	-3.63%
Mid Open Interest (Cr.)	0.12	0.11	14.07%
Rollover (%)	9.11	7.66	18.91%
Put Call Ratio (OI)	0.72	0.91	-21.04%
Put Call Ratio(Vol)	0.97	0.94	3.36%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4100	5495	34574
Index Options	1753346	1757071	375653
Stock Futures	32167	40273	320054
Stock Options	50534	52106	41799
Total	1840147	1854945	772080

Source: NSE

Global Equity Market

Global Indices	5-Aug-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2828.07	-2.97%	-5.23%	-6.60%
Nasdaq 100 (U.S.)	17895.15	-2.96%	-6.11%	-12.24%
FTSE (U.K.)	8008.23	-2.04%	-3.43%	-2.39%
DAX Index (Germany)	17339.00	-1.82%	-5.36%	-6.15%
CAC 40 Index (France)	7148.99	-1.42%	-3.96%	-6.86%
SSE Composite (China)	2860.70	-1.54%	-1.08%	-3.03%
Nikkei (Japan)	31458.42	-12.40%	-18.22%	-23.11%
Kospi (South Korea)	2441.55	-8.77%	-11.71%	-14.70%
HangSeng (Hong Kong)	16698.36	-1.46%	-3.13%	-6.19%
Strait Times (Singapore)	3243.67	-4.07%	-5.82%	-4.90%
Ibovespa Sao Paulo (Brazil)	125269.54	-0.46%	-1.33%	-0.79%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7649.60	-3.70%	-4.26%	-2.21%
Jakarta Composite (Indonesia)	7059.65	-3.40%	-3.15%	-2.67%
KLSE (Malaysia)	1536.48	-4.63%	-5.42%	-4.63%

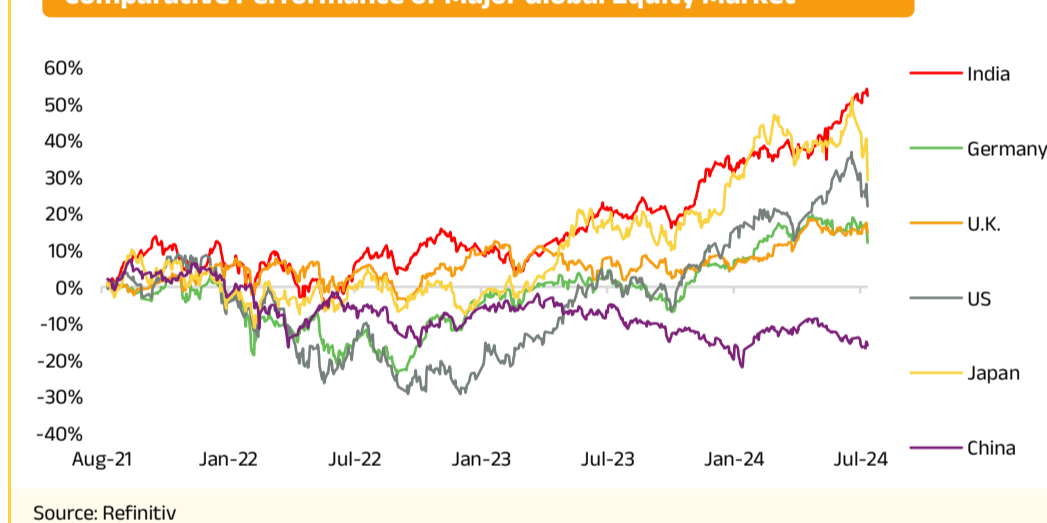
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

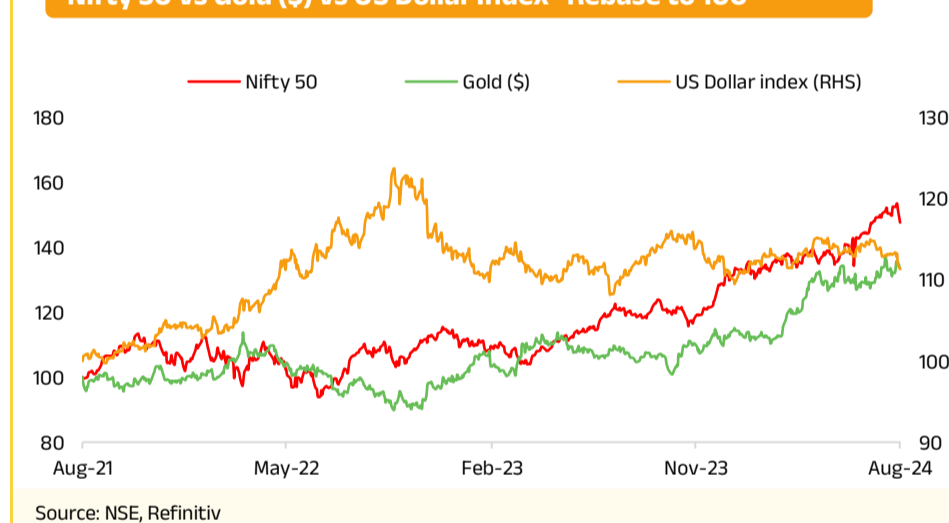
Commodity Prices	5-Aug-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	69,257	-1.20%	1.07%	-4.27%
Gold (\$/oz)	2,407.65	-1.46%	1.01%	0.68%
Silver (INR/1 kg)	79,975	-4.07%	-2.54%	-11.71%
Silver (\$/oz)	27.27	-4.45%	-2.10%	-12.62%
Brent Crude(\$/bbl)	78.72	-1.23%	-4.21%	-12.67%
Crude Oil (INR/1 bbl)	6,156.00	-3.65%	-4.71%	-12.14%
NYMEX Crude(\$/bbl)	74.31	-0.71%	-3.64%	-11.89%
Natural Gas (INR/1 mmbtu)	164.70	-0.06%	-1.96%	-18.47%
Aluminium (INR/1 kg)	210.65	-1.17%	-1.17%	-10.85%
Copper (INR/1 kg)	783.00	-2.00%	-0.89%	-9.78%
Nickel (INR/1 kg)	1,375.70	0.16%	2.90%	-6.12%
Lead (INR/1 kg)	190.20	-0.86%	-3.23%	-1.58%
Zinc (INR/1 kg)	251.00	-1.72%	-1.93%	-10.60%
Mentha Oil (INR/1 kg)	1,008.20	0.52%	3.35%	2.33%
Baltic Dry Index ^[1]	1,675	0.42%	-6.79%	-14.80%

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



Value and Growth Fund

Definition: Growth and value are the two most common investment strategies. These two styles of investment have different set of characteristics that make either, or both suitable for investors based on the investment objective of the investor. During different economic conditions, either of these strategies can dominate.



Explanation

A basic principal behind value investing is that markets are inefficient and investors can benefit from this anomaly. In other words, value investing is about finding stocks that the market has not correctly priced. It involves buying a stock on the basis of its fundamentals which include earning growth, cash flow, dividend yield, book value and replacement cost. If the company's fundamentals are strong but the stock's price is below its obvious value, then there arises a value investing opportunity. On the other hand, growth investing targets stocks which have above average earning growth rate, above average sales growth rate and low dividend yield.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-1.26	14.20	31.52	15.69
Mid Cap Fund	-2.84	19.63	46.28	22.73
Large & Mid Cap Fund	-1.79	17.30	39.62	19.68
Small Cap Fund	-3.16	15.03	41.55	23.12
Multi Cap Fund	-2.18	16.04	40.49	20.85
Focused Fund	-1.55	15.75	34.07	17.01
Value Fund	-1.17	15.50	42.95	21.48
Contra Fund	0.23	18.14	46.00	24.02
ELSS	-2.25	14.98	35.20	18.77
Equity Savings	0.08	6.94	14.81	9.17
Arbitrage Fund	0.57	3.59	7.52	5.58
Dividend Yield Fund	0.35	16.61	45.52	22.90
Aggressive Hybrid Fund	-1.02	13.03	28.17	14.76
Balanced Advantage	-0.37	9.41	22.78	11.95

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 02 Aug, 2024

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