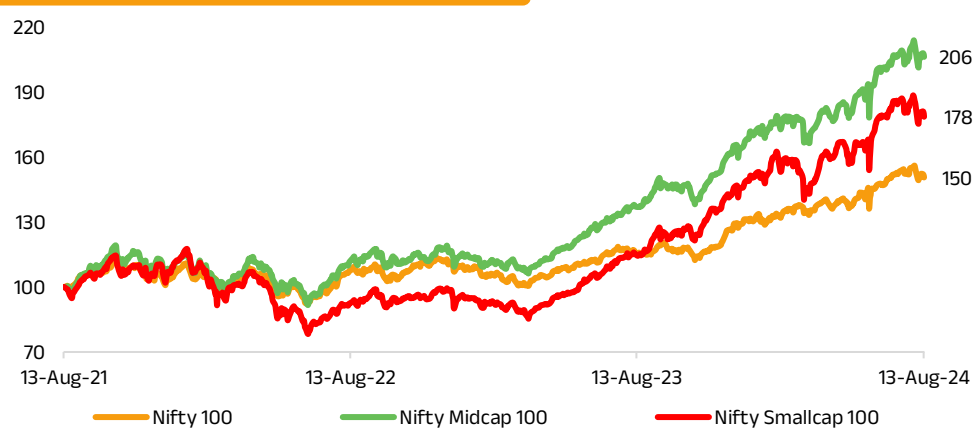


Broad Indices Historical Movement



Source: NSE

Broad Indices

	13-Aug-24	1 Day	1 Week	1 Month
Nifty 50	24,139.00	-0.85%	0.61%	-1.48%
Nifty 100	25,155.15	-0.91%	0.86%	-1.65%
Nifty 200	13,691.50	-0.89%	1.12%	-1.47%
Nifty 500	22,705.80	-0.92%	1.17%	-1.69%
Nifty Large Midcap 250	15,883.45	-0.84%	1.48%	-1.43%
Nifty Midcap 150	21,044.95	-0.77%	2.10%	-1.20%
Nifty Next 50	71,609.80	-1.14%	1.89%	-2.88%
Nifty Smallcap 250	17,177.40	-1.23%	1.81%	-2.84%

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

Smart Beta Index

Index	13-Aug-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,270.15	-1.14%	2.84%	-2.76%
NIFTY 500 Value 50	14,685.33	-1.75%	0.96%	-3.25%
Nifty 200 Quality 30	21,740.45	-0.23%	1.05%	0.09%
Nifty 50 Equal Weight	30,883.85	-0.73%	0.58%	-0.29%
NIFTY Alpha Low Volatility 30	29,212.85	-0.33%	1.37%	0.93%
Nifty High Beta 50	4,033.14	-2.01%	0.83%	-6.24%
Nifty Low Volatility 50	24,534.02	-0.44%	0.50%	0.14%
Nifty Midcap150 Momentum 50	63,305.30	-0.47%	3.62%	-2.99%
Nifty PSE	11,092.15	-1.58%	1.22%	-2.48%
Nifty SME Emerge	14,985.64	-0.67%	4.27%	0.70%
Nifty 100 ESG	4,816.20	-0.79%	0.78%	-1.26%

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

Sector Indices

Index	13-Aug-24	1 Day	1 Week	1 Month
Nifty Auto	25,081.85	-0.78%	2.29%	-0.25%
Nifty Bank	49,831.85	-1.48%	0.17%	-4.68%
Nifty Consumption	11,617.90	-0.37%	1.33%	2.38%
Nifty Financial	22,596.80	-1.87%	0.34%	-4.27%
Nifty FMCG	61,495.75	-0.28%	-0.18%	2.96%
Nifty Healthcare	13,901.75	0.09%	2.35%	6.58%
Nifty IT	39,114.85	0.01%	1.27%	0.24%
Nifty Media	2,039.00	-0.95%	1.58%	-1.69%
Nifty Metal	8,957.15	-1.64%	0.77%	-7.74%
Nifty MNC	30,190.55	-0.57%	0.51%	-2.20%
Nifty Pharma	22,191.60	-0.06%	2.92%	7.66%
Nifty Realty	1,028.10	-0.73%	2.75%	-5.95%
Nifty Energy	42,570.35	-0.81%	0.22%	-0.64%

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

Nifty 50 Top 5 Gainers

Company	13-Aug-24	Prev_Day	% Change	1 Week
Titan Industries Limited	3,383.55	3,320.85	1.89	1.45
Dr.Reddy	6,948.40	6,886.55	0.90	2.07
Tata Beverages	1,178.80	1,170.80	0.68	-0.57
HCL Tech	1,592.65	1,585.25	0.47	0.63
Britannia Industries Limited	5,666.50	5,645.75	0.37	-3.21

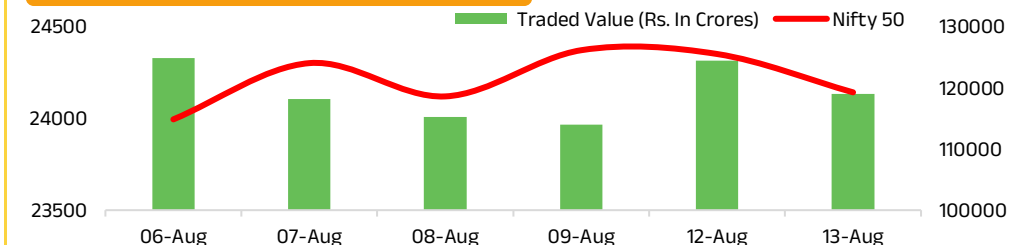
Source: NSE

Nifty 50 Top 5 Losers

Company	13-Aug-24	Prev_Day	% Change	1 Week
BPCL	321.70	333	-3.51	-3.88
HDFC Bank	1,603.20	1660	-3.43	0.12
Indian Oil	164.12	169	-2.98	-1.73
HDFC Standard Life Insurance Company	685.00	702	-2.48	0.79
United Phos	552.05	565	-2.31	3.47

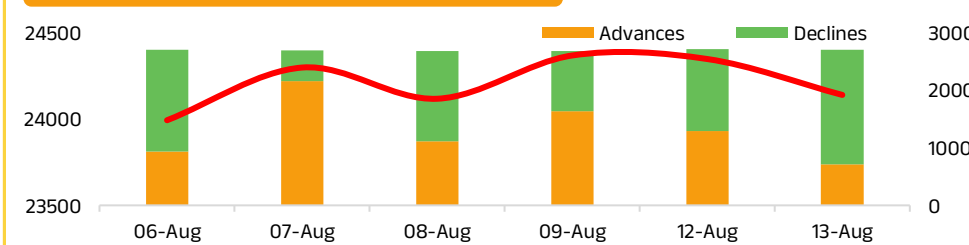
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

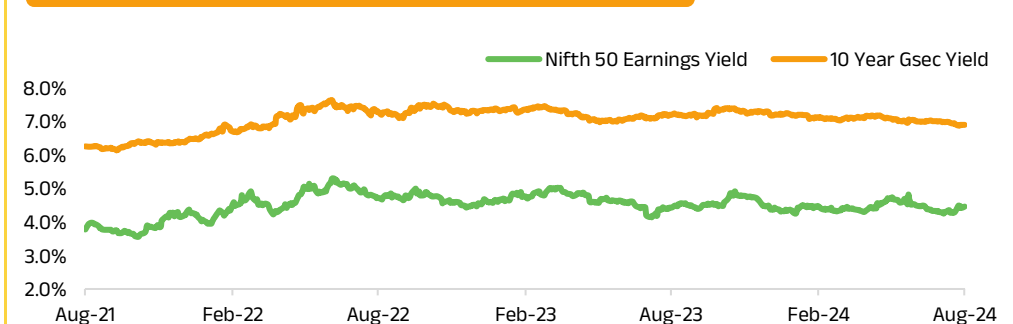
Indian equity markets witnessed fall amid mixed global cues. The key benchmark indices slipped towards southwards following domestic industrial production data of Jun 2024, indicating a lacklustre growth in the major manufacturing sector. Losses were extended following a surge in global crude oil prices amid escalated geopolitical tensions between Ukraine and Russia.

Hindalco Industries announced a consolidated net profit of Rs. 3,074 crore for Q1FY25, marking a 25% increase from Rs. 2,454 crore in Q1FY24. The revenue from operations for Q1FY25 reached Rs. 57,013 crore, up 7.6% from Rs. 52,991 crore in Q1FY24.

Nykaa the company which is operated by FSN E-Commerce Ventures, announced a consolidated net profit of Rs. 13.64 crore for the first quarter of FY25, marking a 152% increase from Rs. 5.42 crore in the same quarter of FY24. The company's revenue from operations for Q1FY25 reached Rs. 1,746.11 crore, up 23% from Rs. 1,421.82 crore in Q1FY24.

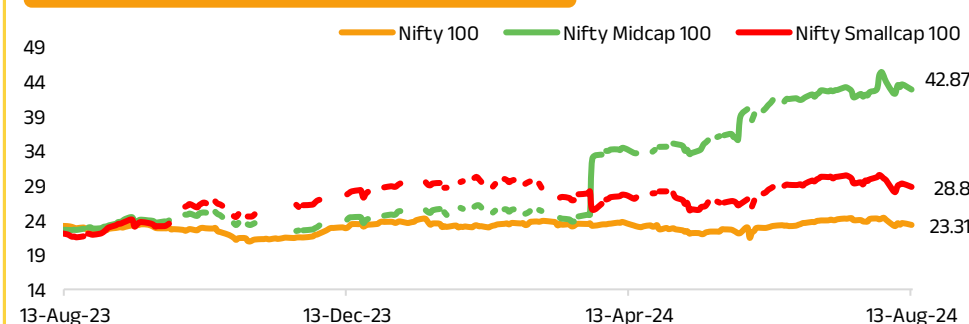
Indian Railway Finance Corporation (IRFC) reported a net profit of Rs. 1,577 crore for the first quarter of FY25, marking a 1.6% increase from Rs. 1,551 crore in the same quarter of FY24. The revenue from operations for Q1FY25 was Rs. 6,766 crore, which is a 1.4% rise compared to Rs. 6,674 crore in Q1FY24.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



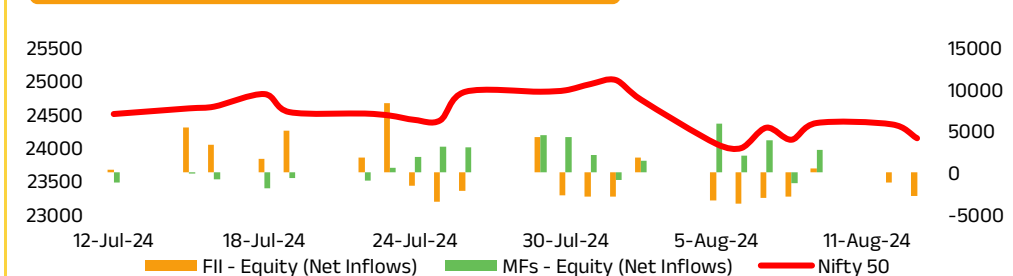
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-2811.08	-17,404	14,961	18,162
MF**	2703.5	13,587	34,188	225,614
DII	1239.96	29,218	52,704	288,831

Source: SEBI, NSDL; **As on 9th Aug 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24161.00	24356.80	-0.80%
Near Basis	22.00	9.80	124.49%
Mid Futures	24292.20	24492.30	-0.82%
Mid Basis	153.20	145.30	5.44%
Near Open Interest (Cr.)	1.20	1.17	2.52%
Mid Open Interest (Cr.)	0.15	0.14	12.85%
Rollover (%)	13.62	12.53	8.74%
Put Call Ratio (OI)	0.78	1.03	-24.16%
Put Call Ratio(Vol)	0.87	0.85	2.39%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2832	3255	33826
Index Options	2275213	2280004	340268
Stock Futures	26623	26116	313580
Stock Options	47615	48407	60525
Total	2352282	2357782	748199

Source: NSE

Global Equity Market

Global Indices	13-Aug-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2962.75	1.69%	3.69%	-3.13%
Nasdaq 100 (U.S.)	19006.43	2.50%	5.14%	-6.52%
FTSE (U.K.)	8235.23	0.30%	2.60%	-0.21%
DAX Index (Germany)	17812.05	0.48%	2.64%	-4.99%
CAC 40 Index (France)	7275.87	0.35%	2.05%	-5.81%
SSE Composite (China)	2867.95	0.34%	0.02%	-3.48%
Nikkei (Japan)	36232.51	3.45%	4.49%	-12.04%
Kospi (South Korea)	2621.50	0.12%	3.94%	-8.24%
HangSeng (Hong Kong)	17174.06	0.36%	3.16%	-6.12%
Strait Times (Singapore)	3258.57	0.72%	1.88%	-6.84%
Ibovespa Sao Paulo (Brazil)	132397.97	0.98%	4.86%	2.72%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7826.80	0.17%	1.90%	-1.66%
Jakarta Composite (Indonesia)	7356.64	0.81%	3.19%	0.40%
KLSE (Malaysia)	1609.52	0.18%	2.23%	-0.59%

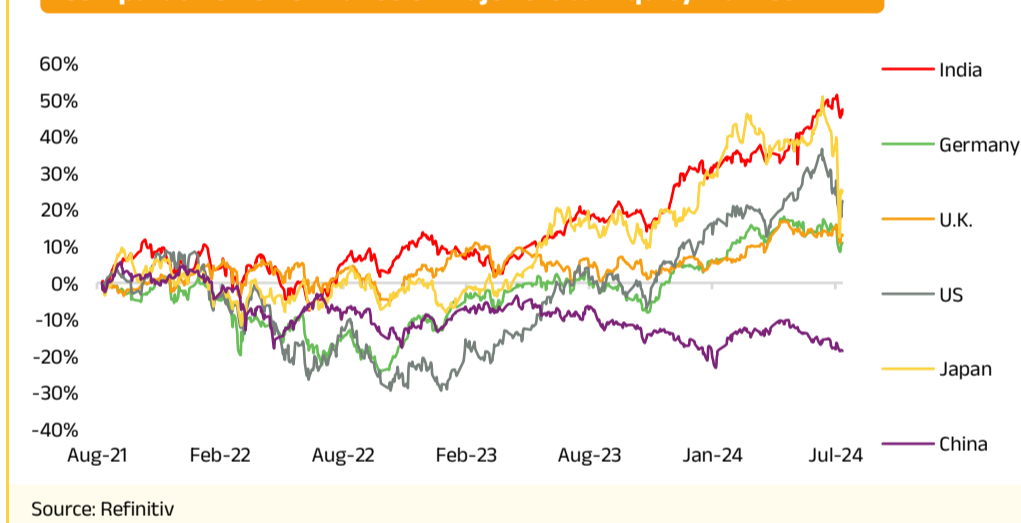
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

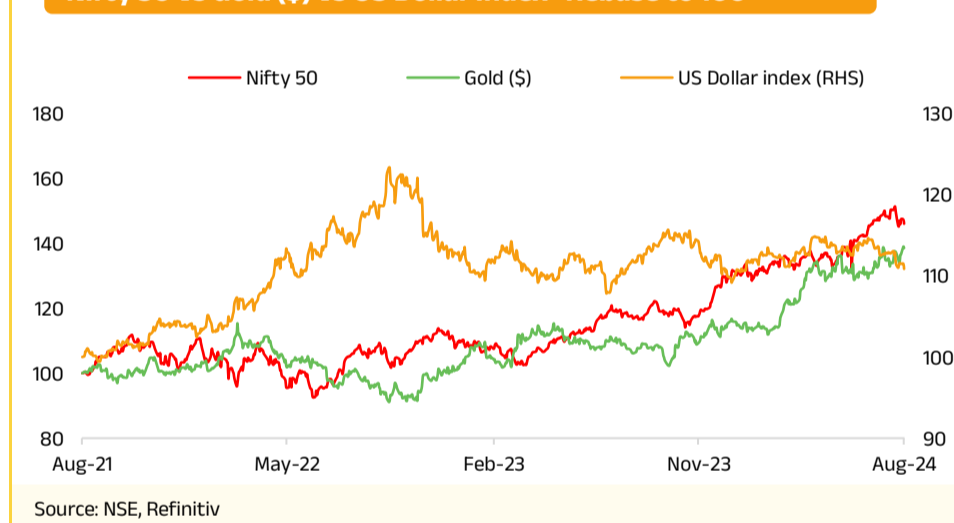
Commodity Prices	13-Aug-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	70,158	0.69%	1.68%	-3.55%
Gold (\$/oz)	2,465.03	-0.29%	3.17%	2.23%
Silver (INR/1 kg)	80,510	-0.59%	1.91%	-12.03%
Silver (\$/oz)	27.84	-0.61%	2.95%	-9.53%
Brent Crude(\$/bbl)	83.71	-0.65%	7.57%	-5.73%
Crude Oil (INR/1 bbl)	6,723.00	4.28%	9.94%	-2.59%
NYMEX Crude(\$/bbl)	79.66	-2.02%	7.00%	-4.47%
Natural Gas (INR/1 mmbtu)	183.80	2.22%	12.90%	-3.01%
Aluminium (INR/1 kg)	215.05	-0.23%	1.85%	-6.90%
Copper (INR/1 kg)	785.00	0.00%	0.99%	-8.67%
Nickel (INR/1 kg)	1,363.80	-0.45%	0.10%	-4.68%
Lead (INR/1 kg)	189.55	-1.71%	0.53%	-4.27%
Zinc (INR/1 kg)	260.00	-1.38%	4.06%	-6.27%
Mentha Oil (INR/1 kg)	994.60	-0.66%	-1.40%	2.55%
Baltic Dry Index ^[1]	1,655	-0.90%	-1.78%	-17.13%

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	-1.45	14.77	32.30	15.54
Mid Cap Fund	-1.13	22.75	47.32	23.70
Large & Mid Cap Fund	-0.90	19.29	40.64	20.04
Small Cap Fund	-1.00	19.66	43.23	24.35
Multi Cap Fund	-0.93	18.49	41.59	21.33
Focused Fund	-0.98	16.98	35.30	17.14
Value Fund	-1.06	17.31	43.19	21.73
Contra Fund	0.20	19.84	46.28	24.17
ELSS	-1.37	16.65	36.57	19.15
Equity Savings	0.20	7.40	15.16	9.19
Arbitrage Fund	0.58	3.76	7.55	5.61
Dividend Yield Fund	-0.34	18.57	45.68	22.78
Aggressive Hybrid Fund	-0.70	14.13	28.98	14.89
Balanced Advantage	-0.36	10.13	23.15	12.06

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 12 Aug, 2024

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