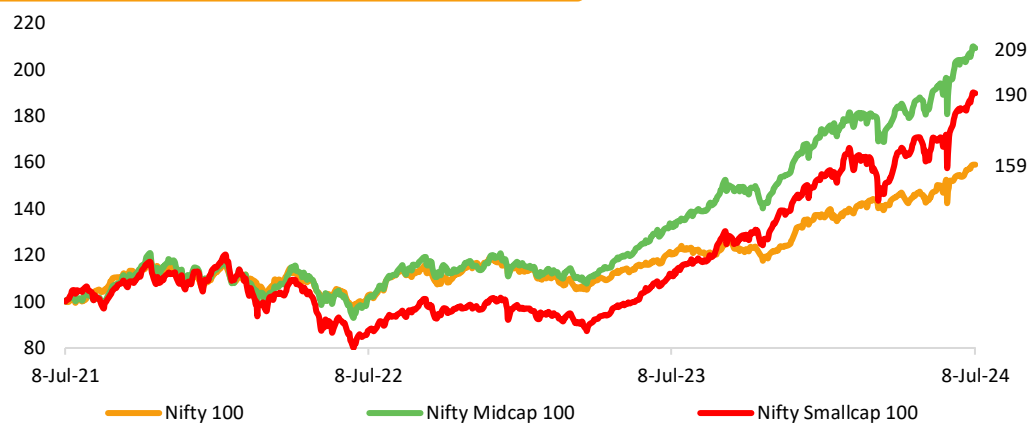


Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,320.55	-0.01%	0.74%	4.42%
Nifty 100	25,393.55	0.01%	0.95%	4.65%
Nifty 200	13,800.40	-0.05%	0.96%	5.01%
Nifty 500	22,971.15	-0.07%	1.07%	5.55%
Nifty Large Midcap 250	16,051.00	-0.14%	1.09%	5.87%
Nifty Midcap 150	21,289.35	-0.30%	1.23%	7.07%
Nifty Next 50	73,508.80	0.11%	1.82%	6.19%
Nifty Smallcap 250	17,665.75	-0.26%	1.72%	9.73%

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

Smart Beta Index

Index	8-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,423.00	-0.08%	2.12%	4.59%
NIFTY 500 Value 50	15,085.47	-0.01%	1.93%	5.88%
Nifty 200 Quality 30	21,352.75	0.35%	2.02%	4.85%
Nifty 50 Equal Weight	30,619.25	-0.21%	0.75%	3.70%
NIFTY Alpha Low Volatility 30	28,588.10	-0.17%	1.66%	4.18%
Nifty High Beta 50	4,321.35	0.09%	2.50%	6.85%
Nifty Low Volatility 50	24,137.01	0.21%	1.20%	4.14%
Nifty Midcap150 Momentum 50	64,964.85	0.05%	2.90%	6.50%
Nifty PSE	11,225.05	1.17%	4.59%	9.02%
Nifty SME Emerge	15,267.40	-1.51%	5.11%	16.35%
Nifty 100 ESG	4,823.15	0.01%	0.83%	4.47%

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

Sector Indices

Index	8-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,260.50	-0.54%	-0.25%	0.96%
Nifty Bank	52,425.80	-0.45%	-0.28%	5.27%
Nifty Consumption	11,239.90	0.17%	0.44%	1.08%
Nifty Financial	23,586.75	-0.23%	-0.19%	6.41%
Nifty FMCG	58,611.20	1.63%	2.55%	1.14%
Nifty Healthcare	12,930.50	-0.35%	2.66%	4.80%
Nifty IT	37,742.25	0.06%	2.37%	7.31%
Nifty Media	2,039.95	-0.37%	-0.03%	3.52%
Nifty Metal	9,877.35	-0.93%	-0.06%	0.44%
Nifty MNC	30,867.00	-0.24%	0.65%	3.80%
Nifty Pharma	20,325.80	-0.63%	2.87%	3.82%
Nifty Realty	1,114.30	-0.43%	1.20%	4.19%
Nifty Energy	42,644.95	0.28%	2.59%	5.86%

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

Nifty 50 Top 5 Gainers

Company	8-Jul-24	Prev_Day	% Change	1 Week
ONGC	299.15	288.20	3.80	9.60
ITC	443.60	433.65	2.29	3.39
HDFC Standard Life Insurance Company Limited	620.90	607.35	2.23	3.35
HUL	2,587.15	2,547.00	1.58	3.28
Tata Beverages	1,150.80	1,137.40	1.18	5.14

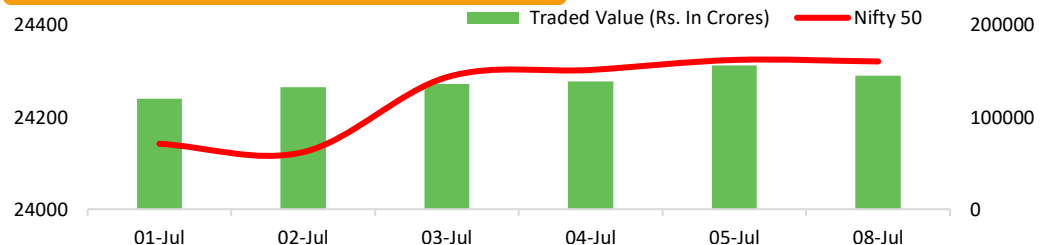
Source: NSE

Nifty 50 Top 5 Losers

Company	8-Jul-24	Prev_Day	% Change	1 Week
Divi's Lab	4,464.20	4630	-3.57	-3.00
Titan Industries Limited	3,156.20	3269	-3.46	-8.02
BPCL	299.50	307	-2.33	-1.66
Adani Ports & SEZ	1,475.30	1500	-1.68	0.05
JSW Steel	939.20	954	-1.56	-0.50

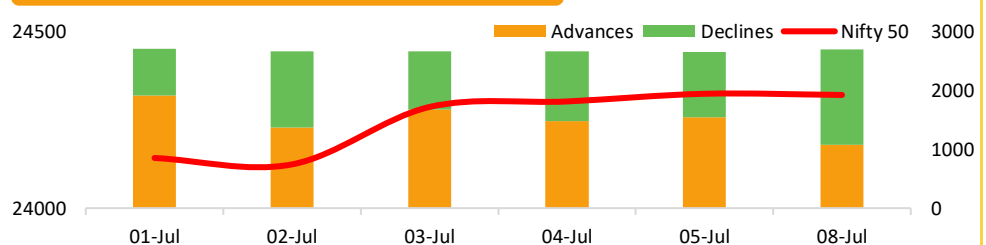
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

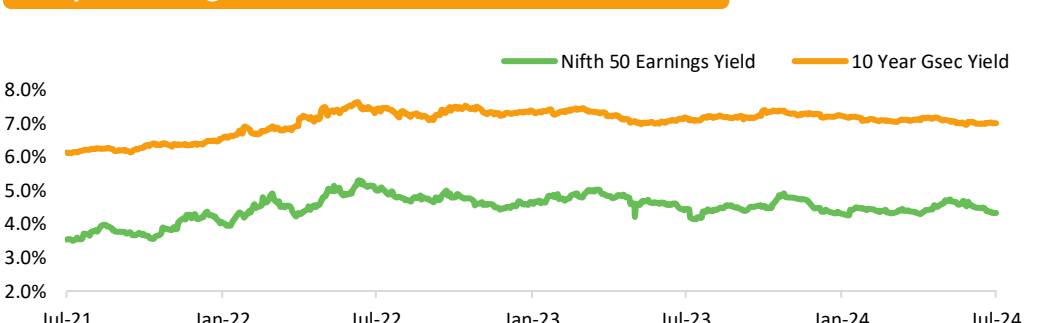
Indian equity markets closed on a flat note after staying in the negative zone the whole day. The market fell on concerns about political instability in France. However, investors were optimistic about potential U.S. interest rate cuts after the publication of the employment report on 5th Jul, 2024, which showed a small decline in U.S. job growth for Jun 2024. This led to the anticipation that the U.S. Fed would lower interest rates.

Tata Group Airlines made the significant announcement on Jul 08, 2024, that it had successfully merged all four of its airlines into two by harmonizing the operating procedures across all its core functions. This achievement marks a significant step in consolidating the merger of four airlines into two.

Larsen and Toubro announced on Jul 08, 2024, that an agreement had been reached to construct two GW-scale solar power plants in West Asia, which are probably worth Rs. 10,000 crores to Rs. 15,000 crores. According to reports, Larsen & Toubro's renewable division has secured significant contracts with a prominent developer in the Middle East to construct two large-scale solar PV plants with a combined capacity of 3.5 GW.

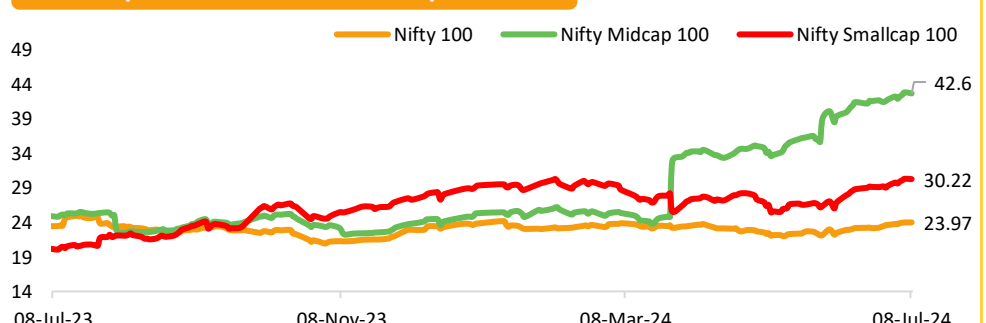
Tata Motors reported that their global wholesales for the quarter ending on Jun 30, 2024, reached 329,847 units, showing a 2% YoY growth. During the Q1 of FY2025, Tata Motors' global wholesales of passenger vehicles reached 138,682 units, showing a 1% decline from the same period in FY 2024.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



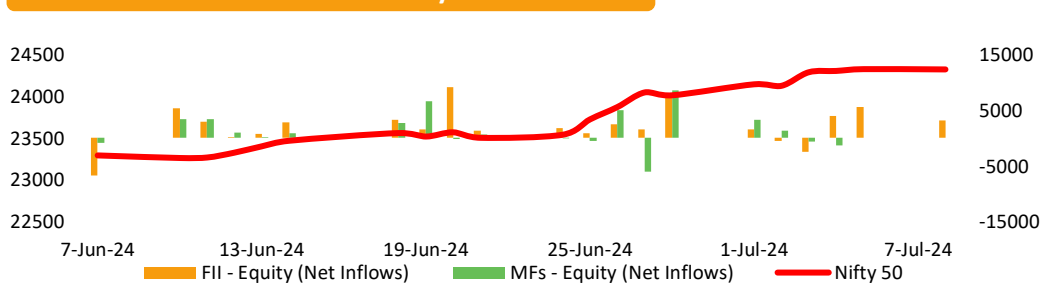
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	3169.45	11,132	11,132	14,332
MF**	-1300.38	2,521	2,521	193,947
DII*	-1651.36	-385	-385	235,742

Source: SEBI, NSDL; *As on 5th Jul 2024; **As on 4th Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24375.60	24379.40	-0.02%
Near Basis	55.05	55.55	-0.90%
Mid Futures	24493.35	24497.30	-0.02%
Mid Basis	172.80	173.40	-0.35%
Near Open Interest (Cr.)	1.42	1.42	0.48%
Mid Open Interest (Cr.)	0.14	0.14	-2.14%
Rollover (%)	9.79	9.93	-1.41%
Put Call Ratio (OI)	1.20	1.03	15.95%
Put Call Ratio(Vol)	0.84	1.02	-17.94%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2430	2927	36981
Index Options	1547641	1531426	376394
Stock Futures	25186	25517	317033
Stock Options	42845	42979	37326
Total	1618103	1602849	767734

Source: NSE

Global Equity Market

Global Indices	8-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3030.89	0.10%	1.68%	4.00%
Nasdaq 100 (U.S.)	20439.54	0.23%	3.17%	7.57%
FTSE (U.K.)	8193.49	-0.13%	0.33%	-0.63%
DAX Index (Germany)	18472.05	-0.02%	0.99%	-0.46%
CAC 40 Index (France)	7627.45	-0.63%	0.88%	-4.68%
SSE Composite (China)	2922.45	-0.93%	-2.41%	-4.22%
Nikkei (Japan)	40780.70	-0.32%	2.90%	5.42%
Kospi (South Korea)	2857.76	-0.16%	1.91%	4.96%
HangSeng (Hong Kong)	17524.06	-1.55%	-1.10%	-4.59%
Strait Times (Singapore)	3404.47	-0.19%	1.97%	2.21%
Ibovespa Sao Paulo (Brazil)	126548.34	0.22%	1.47%	4.79%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7763.20	-0.76%	0.16%	-1.23%
Jakarta Composite (Indonesia)	7250.98	-0.03%	1.56%	5.12%
KLSE (Malaysia) ^[1]	1611.02	-0.35%	0.80%	-0.42%

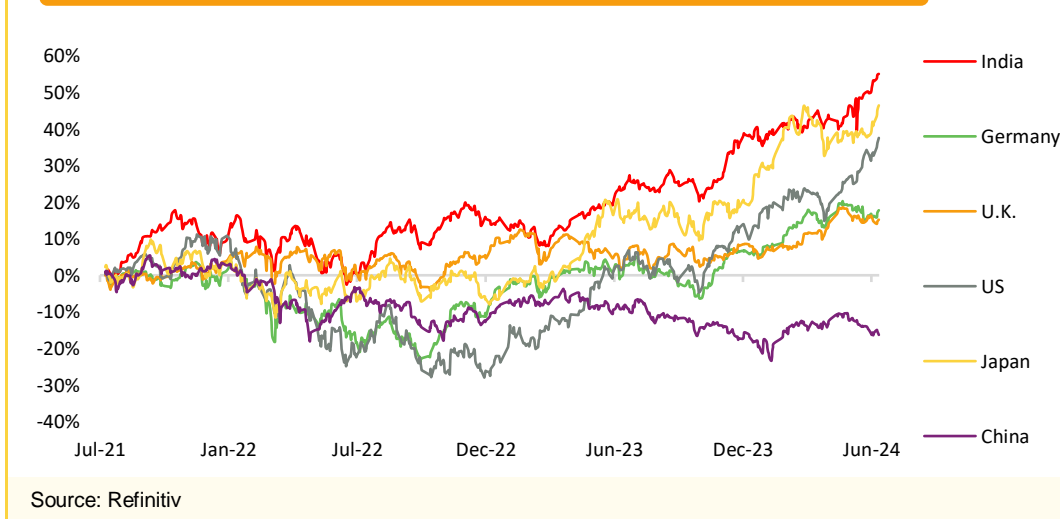
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

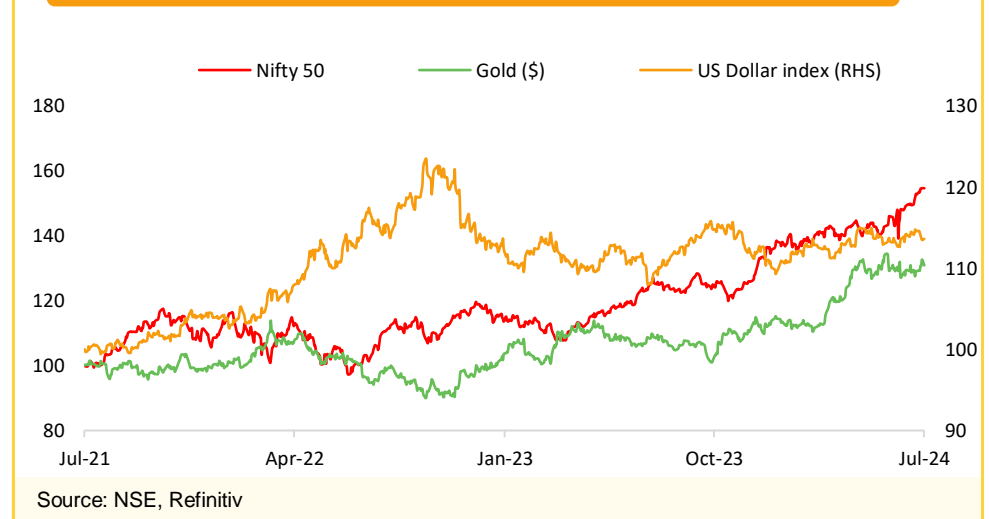
Commodity Prices	8-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	72,550	0.28%	1.45%	1.12%
Gold (\$/oz)	2,358.80	-1.37%	1.16%	2.88%
Silver (INR/1 kg)	91,663	1.20%	4.58%	1.40%
Silver (\$/oz)	30.79	-1.35%	4.59%	5.54%
Brent Crude(\$/bbl)	88.60	-1.71%	0.61%	11.78%
Crude Oil (INR/1 bbl)	6,944.00	-0.90%	2.04%	10.12%
NYMEX Crude(\$/bbl)	83.53	-0.96%	-1.26%	9.29%
Natural Gas (INR/1 mmbtu)	193.60	-4.16%	-10.82%	-17.79%
Aluminium (INR/1 kg)	234.85	-0.61%	0.36%	-2.35%
Copper (INR/1 kg)	873.60	0.66%	3.79%	0.48%
Nickel (INR/1 kg)	1,462.50	-0.20%	-0.23%	-5.67%
Lead (INR/1 kg)	197.50	2.20%	-0.43%	0.51%
Zinc (INR/1 kg)	279.40	-0.48%	1.66%	5.93%
Mentha Oil (INR/1 kg)	995.80	1.08%	6.21%	0.90%
Baltic Dry Index ^[1]	1,966	-2.72%	-8.90%	4.52%

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. In times of an economic upturn the growth strategy usually delivers high returns over a shorter period.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	5.08	18.13	35.11	17.72
Mid Cap Fund	7.59	25.98	55.46	25.37
Large & Mid Cap Fund	6.37	22.39	45.54	22.02
Small Cap Fund	8.57	21.89	51.59	26.47
Multi Cap Fund	6.73	22.11	48.33	23.59
Focused Fund	5.76	19.47	39.17	19.18
Value Fund	6.27	22.06	49.20	23.70
Contra Fund	5.86	22.60	49.45	25.56
ELSS	6.18	19.86	41.43	21.29
Equity Savings	2.21	7.99	16.07	9.73
Arbitrage Fund	0.49	3.68	7.51	5.48
Dividend Yield Fund	6.09	22.32	48.99	24.47
Aggressive Hybrid Fund	4.83	16.45	31.97	16.44
Balanced Advantage	3.69	12.03	24.85	12.86

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 05 Jul, 2024

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