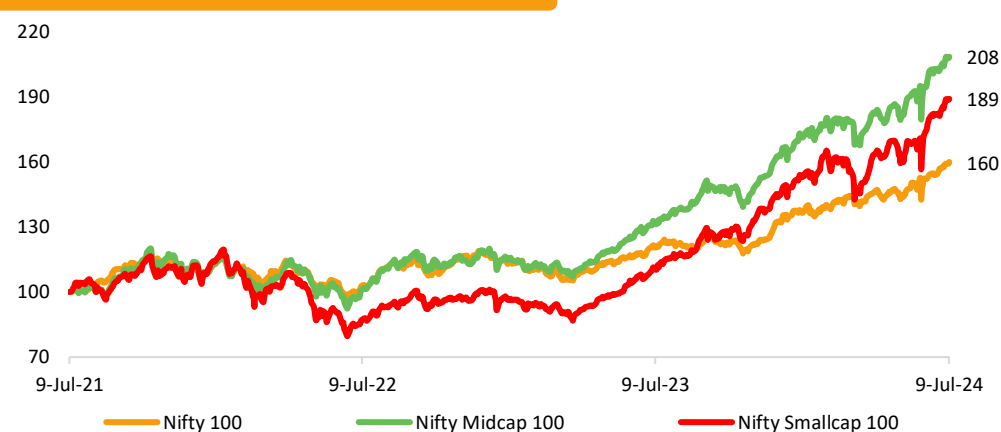


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	9-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,433.20	0.46%	1.28%	4.91%
Nifty 100	25,515.10	0.48%	1.57%	5.15%
Nifty 200	13,863.20	0.46%	1.67%	5.49%
Nifty 500	23,067.35	0.42%	1.72%	5.99%
Nifty Large Midcap 250	16,111.35	0.38%	1.83%	6.27%
Nifty Midcap 150	21,347.50	0.27%	2.09%	7.36%
Nifty Next 50	73,863.60	0.48%	2.86%	6.70%
Nifty Smallcap 250	17,707.65	0.24%	2.12%	9.99%

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

## Smart Beta Index

Index	9-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,572.85	0.41%	3.16%	5.02%
NIFTY 500 Value 50	15,120.27	0.23%	2.65%	6.12%
Nifty 200 Quality 30	21,444.15	0.43%	2.68%	5.30%
Nifty 50 Equal Weight	30,802.10	0.60%	1.65%	4.32%
NIFTY Alpha Low Volatility 30	28,906.05	1.11%	3.17%	5.34%
Nifty High Beta 50	4,324.09	0.06%	3.41%	6.92%
Nifty Low Volatility 50	24,318.89	0.75%	2.34%	4.93%
Nifty Midcap150 Momentum 50	65,088.10	0.19%	3.53%	6.70%
Nifty PSE	11,233.25	0.07%	4.84%	9.10%
Nifty SME Emerge	15,090.69	-1.16%	2.24%	15.01%
Nifty 100 ESG	4,845.00	0.45%	1.48%	4.94%

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

## Sector Indices

Index	9-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,823.55	2.23%	2.76%	3.21%
Nifty Bank	52,568.80	0.27%	0.77%	5.55%
Nifty Consumption	11,375.85	1.21%	2.43%	2.31%
Nifty Financial	23,662.60	0.32%	0.69%	6.75%
Nifty FMCG	59,182.65	0.97%	4.44%	2.12%
Nifty Healthcare	13,077.80	1.14%	4.16%	6.00%
Nifty IT	37,668.65	-0.20%	0.99%	7.10%
Nifty Media	2,047.25	0.36%	-0.72%	3.89%
Nifty Metal	9,881.90	0.05%	0.47%	0.49%
Nifty MNC	31,199.30	1.08%	2.30%	4.91%
Nifty Pharma	20,645.80	1.57%	4.34%	5.45%
Nifty Realty	1,127.05	1.14%	1.52%	5.38%
Nifty Energy	42,609.20	-0.08%	2.14%	5.77%

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

## Nifty 50 Top 5 Gainers

Company	9-Jul-24	Prev_Day	% Change	1 Week
Maruti	12,827.70	12,023.60	6.69	6.52
M&M	2,925.50	2,851.35	2.60	2.11
Shree Cements Limited	27,776.30	27,193.25	2.14	0.28
ITC	452.60	443.60	2.03	6.37
Divi's Lab	4,551.95	4,464.20	1.97	-0.43

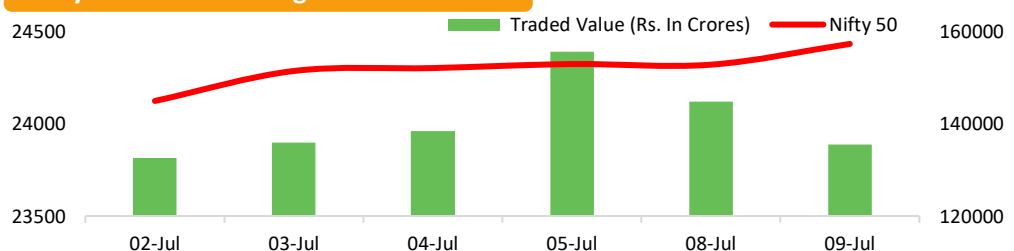
Source: NSE

## Nifty 50 Top 5 Losers

Company	9-Jul-24	Prev_Day	% Change	1 Week
Tata Beverages	1,142.20	1151	-0.75	3.37
RIL	3,180.55	3202	-0.66	1.60
United Phos	563.95	567	-0.61	-0.48
ONGC	297.45	299	-0.57	8.22
Bajaj Finance	7,068.05	7098	-0.43	-1.36

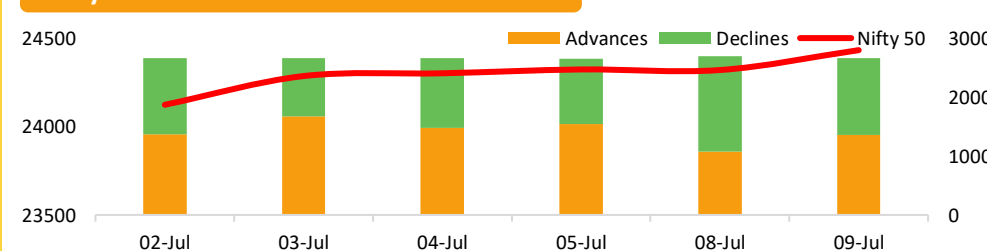
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

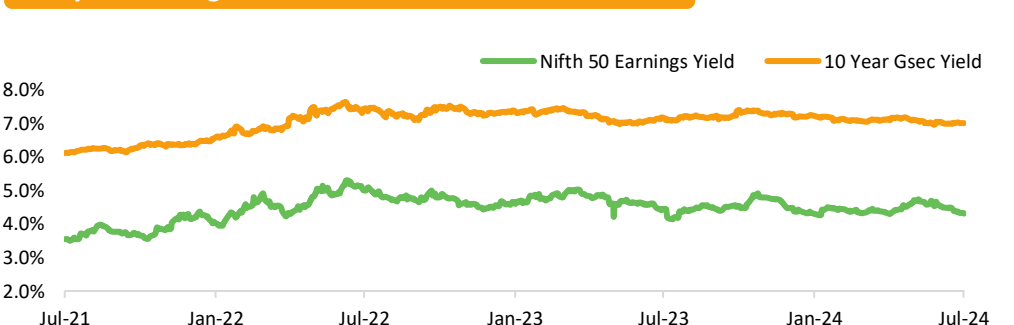
Indian equity markets rose as sentiments were boosted following the foreign fund inflows along with retreat in crude oil prices from the recent high of \$90 per barrel mark. The key benchmark indices reached a record high as consumption sectors like FMCG and auto are leading the gains, buoyed by progress in the monsoon and kharif sowing.

ONGC plans to invest approximately Rs. 2 lakh crores in the establishment of renewable energy sites, green hydrogen plants, and zero gas flaring in order to meet its 2038 net-zero carbon emission target. The company—which generates roughly 58% of natural gas and roughly 2/3rd of India's crude oil—described its strategy for reaching net-zero emissions.

The Adani Group is intending to start shipbuilding operations at Mundra port in Kutch, Gujarat. This choice is being made because shipyards in key countries such as China, South Korea, and Japan are completely reserved until 2028, prompting fleet owners to consider other manufacturing sites like India for their new vessels.

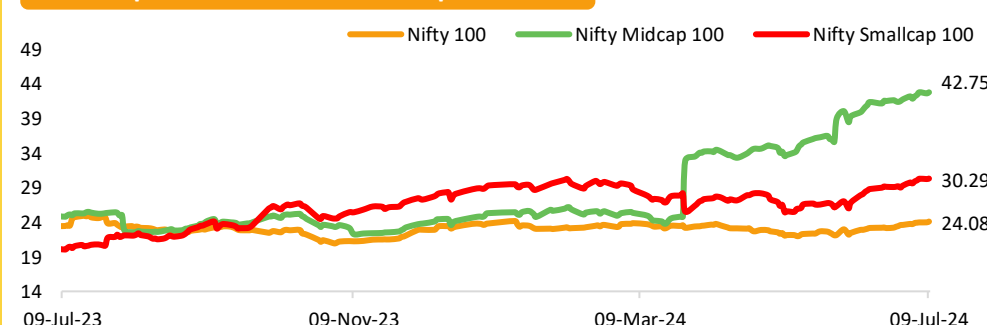
Inox Wind announced that it has received an order for a 200 MW wind power project from a renewable C&I power producer. The order is for Inox Wind Ltd.'s newest 3 MW Wind Turbine Generators and includes complete turnkey implementation. Furthermore, Inox Wind will also offer ongoing operations and maintenance services after the project is commissioned.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



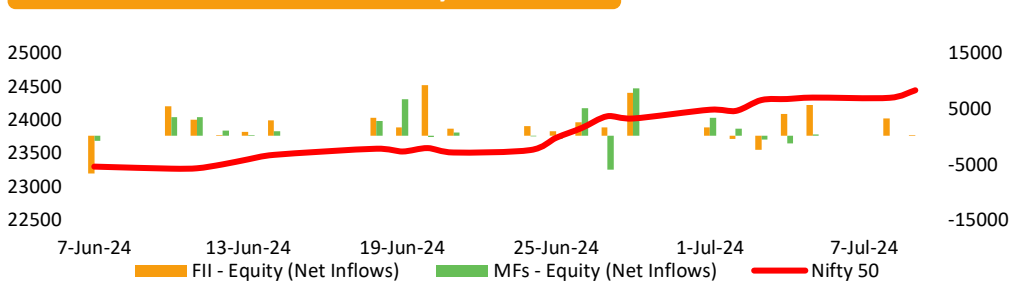
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	YTD
FII	161.67	11,293	11,293	14,494
MF**	274.88	2,796	2,796	194,222
DII	1416.46	3,898	3,898	240,025

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

### F&O Trends

	Latest	Previous	Change %
Near Futures	24485.65	24375.60	0.45%
Near Basis	52.45	55.05	-4.72%
Mid Futures	24607.20	24493.35	0.46%
Mid Basis	174.00	172.80	0.69%
Near Open Interest (Cr.)	1.45	1.42	1.64%
Mid Open Interest (Cr.)	0.14	0.14	-0.42%
Rollover (%)	9.70	9.79	-0.99%
Put Call Ratio (OI)	1.15	1.20	-3.42%
Put Call Ratio(Vol)	0.76	0.84	-8.93%

Source: NSE

### FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2414	2887	36391
Index Options	1772586	1768930	400073
Stock Futures	24173	27933	313615
Stock Options	44325	43885	39589
Total	1843498	1843635	789668

Source: NSE

### Global Equity Market

Global Indices	9-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3031.42	0.02%	1.10%	4.01%
Nasdaq 100 (U.S.)	20453.02	0.07%	2.20%	7.64%
FTSE (U.K.)	8139.81	-0.66%	0.23%	-1.28%
DAX Index (Germany)	18236.19	-1.28%	0.40%	-1.73%
CAC 40 Index (France)	7508.66	-1.56%	-0.39%	-6.16%
SSE Composite (China)	2959.37	1.26%	-1.26%	-3.01%
Nikkei (Japan)	41580.17	1.96%	3.76%	7.49%
Kospi (South Korea)	2867.38	0.34%	3.11%	5.32%
HangSeng (Hong Kong)	17523.23	0.00%	-1.38%	-4.59%
Strait Times (Singapore)	3426.09	0.64%	1.73%	2.86%
Ibovespa Sao Paulo (Brazil)	127108.22	0.44%	1.86%	5.25%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7829.70	0.86%	1.44%	-0.39%
Jakarta Composite (Indonesia)	7269.80	0.26%	2.03%	5.39%
KLSE (Malaysia)	1614.42	0.21%	1.03%	-0.21%

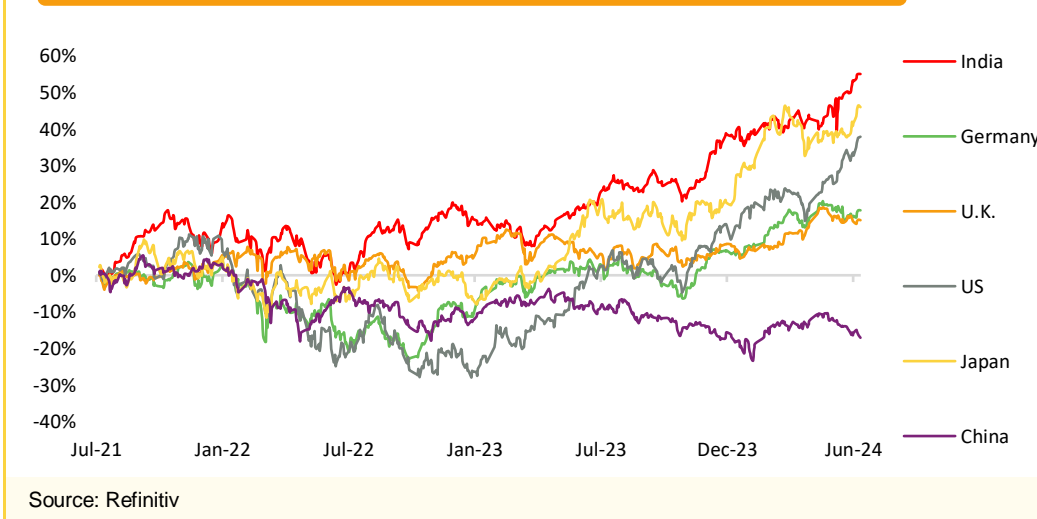
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

### Global & Domestic Commodity Market

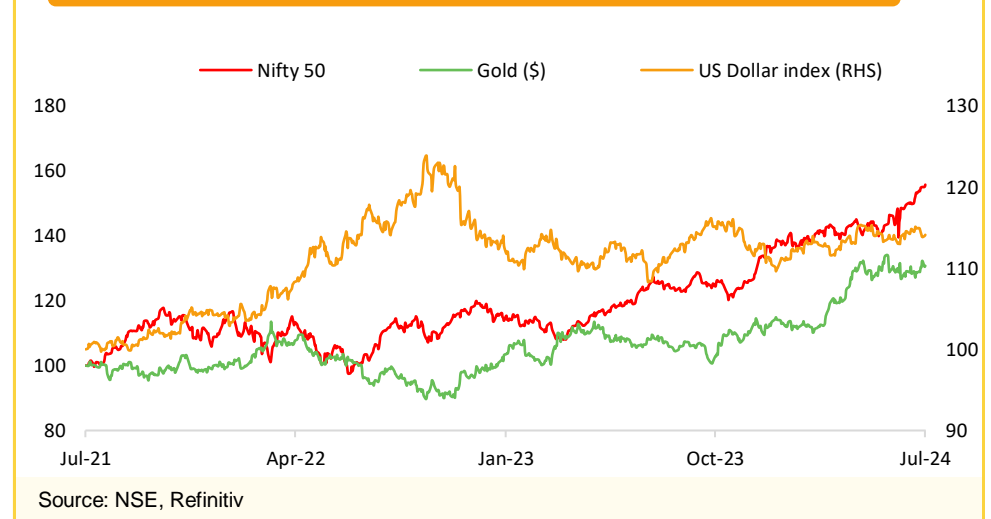
Commodity Prices	9-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	72,271	-0.38%	1.15%	0.73%
Gold (\$/oz)	2,363.58	0.20%	1.47%	3.09%
Silver (INR/1 kg)	91,690	0.03%	4.40%	1.43%
Silver (\$/oz)	30.79	0.00%	4.34%	5.54%
Brent Crude(\$/bbl)	87.95	-0.73%	-2.03%	10.96%
Crude Oil (INR/1 bbl)	6,873.00	-1.02%	-1.16%	8.99%
NYMEX Crude(\$/bbl)	82.68	-1.02%	-1.56%	8.18%
Natural Gas (INR/1 mmbtu)	197.50	2.01%	-4.45%	-16.14%
Aluminium (INR/1 kg)	234.70	-0.06%	1.14%	-2.41%
Copper (INR/1 kg)	872.50	-0.13%	2.77%	0.36%
Nickel (INR/1 kg)	1,460.50	-0.14%	-1.03%	-5.80%
Lead (INR/1 kg)	197.25	-0.13%	0.00%	0.38%
Zinc (INR/1 kg)	277.95	-0.52%	1.18%	5.38%
Mentha Oil (INR/1 kg)	988.40	-0.74%	4.56%	0.15%
Baltic Dry Index <sup>[1]</sup>	1,940	-1.32%	-10.97%	3.14%

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



#### Initial Public Offering (IPO)

Definition: IPO or Initial Public Offering is the process adopted when a private company goes public. Going public helps the company raise cash and improve liquidity. IPO takes place when an organization, which is not yet listed on the stock exchange, makes a fresh issue of securities or an offer for sale of its existing securities or both for the first time to the public. After this, the issuer's securities are listed on the stock exchanges and trading takes place subsequently.



#### Explanation

Before launching the IPO, the issuer in consultation with a merchant banker decides the price. Capital market regulator, Securities and Exchange Board of India (SEBI) does not assume any role in price fixation. However, it is mandatory that both the company and the merchant banker give full disclosures of the parameters that they have taken into consideration while deciding the issue price. Price discovery of the issue can take place either through book-building process or through normal public issue process.

### Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	5.61	18.37	35.67	17.97
Mid Cap Fund	7.98	26.06	55.84	25.38
Large & Mid Cap Fund	6.74	22.46	45.85	22.06
Small Cap Fund	8.83	21.86	51.74	26.46
Multi Cap Fund	7.10	22.18	48.67	23.62
Focused Fund	6.21	19.60	39.61	19.35
Value Fund	6.55	22.02	49.39	23.80
Contra Fund	6.11	22.41	49.54	25.65
ELSS	6.53	19.98	41.76	21.38
Equity Savings	2.33	8.03	16.15	9.78
Arbitrage Fund	0.51	3.70	7.52	5.51
Dividend Yield Fund	6.57	22.59	49.42	24.61
Aggressive Hybrid Fund	5.15	16.54	32.26	16.55
Balanced Advantage	3.93	12.12	25.05	12.97

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.

<sup>[1]</sup>Data as on 08 Jul, 2024

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