Daily Equity Market Pulse -July 18, 2024

Aditya Birla Sun Life **Mutual Fund**





Broad Indices 1 Month 16-Jul-24 1 Day 1 Week Nifty 50 24,613.00 0.11% 1.19% 4.89% Nifty 100 25,679.10 -0.07% 1.00% 4.51% Nifty 200 13,960.90 -0.06% 1.05% 4.49% Nifty 500 23,204.25 -0.02% 0.99% 4.46% 16,204.25 Nifty Large Midcap 250 -0.02% 0.95% 4.04% 0.04% Nifty Midcap 150 21,456.50 0.89% 3.66% Nifty Next 50 73,921.70 -0.60% 0.03% 2.82% 17,774.90 0.18% Nifty Smallcap 250 1.08% 5.52%

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

Smart Beta Index				
Index	16-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,409.45	-0.42%	-0.11%	0.44%
NIFTY 500 Value 50	15,332.54	-0.12%	1.86%	4.33%
Nifty 200 Quality 30	21,875.20	0.42%	2.00%	6.18%
Nifty 50 Equal Weight	31,226.00	0.23%	1.52%	4.09%
NIFTY Alpha Low Volatility 30	29,164.95	0.03%	0.61%	4.04%
Nifty High Beta 50	4,329.86	-0.22%	1.03%	3.35%
Nifty Low Volatility 50	24,701.79	0.27%	1.27%	5.35%
Nifty Midcap150 Momentum 50	65,675.65	-0.20%	1.11%	3.25%
Nifty PSE	11,445.55	-0.60%	1.42%	5.93%
Nifty SME Emerge	14,944.53	-0.17%	0.58%	6.73%
Nifty 100 ESG	4,904.35	0.15%	1.36%	4.92%

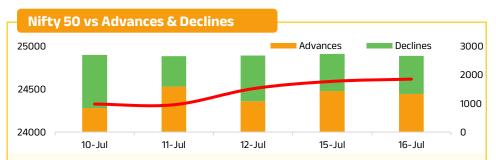
Nifty 50 Top 5 Gainers Company 16-Jul-24 Prev_Day % Change 1 Week Coal India 512.45 497.75 2.95 4.42 BPCL 315.95 307.75 2.66 5.19 HUL 2,688.45 2,620.30 2.60 2.99 1,148.80 2.39 2.21 Tata Beverages 1,176.25 Bharti Airtel 1,466.50 1,437.60 2.01 1.48 Source: NSE



Sector Indices						
Index	16-Jul-24	1 Day	1 Week	1 Month		
Nifty Auto	25,482.90	0.25%	0.71%	-0.93%		
Nifty Bank	52,396.80	-0.11%	0.40%	4.79%		
Nifty Consumption	11,475.80	0.44%	1.29%	2.26%		
Nifty Financial	23,648.35	-0.18%	0.21%	5.52%		
Nifty FMCG	60,645.15	0.96%	2.18%	5.98%		
Nifty Healthcare	13,158.60	-0.40%	0.23%	4.33%		
Nifty IT	39,141.50	0.59%	4.99%	13.13%		
Nifty Media	2,084.05	-1.03%	3.62%	1.27%		
Nifty Metal	9,722.00	-0.08%	-0.01%	-1.92%		
Nifty MNC	31,138.90	0.30%	0.16%	1.53%		
Nifty Pharma	20,765.45	-0.38%	0.19%	4.37%		
Nifty Realty	1,126.25	1.66%	-0.04%	-0.25%		
Nifty Energy	43,204.30	-0.23%	1.24%	5.27%		
Source: NSE: Positive returns indicates green colour, unchanged is vellow and negative returns is rose						

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Nifty 50 Top 5 Loser	s			
Company	16-Jul-24	Prev_Day	% Change	1 Week
Dr.Reddy	6,646.05	6795	-2.19	0.81
Kotak Bank	1,805.30	1844	-2.07	-1.34
Ultratech Cem	11,658.70	11834	-1.48	0.21
United Phos	557.30	565	-1.37	-0.45
NTPC	380.45	386	-1.35	-0.25
Source: NSE				



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

1Ê1 Indian equity markets extended gains for the third straight session despite weak global cues. The key benchmark indices reached new record highs supported by buying in select heavyweight stocks. However, markets witnessed some profit booking at peak levels as investors remained cautious ahead of the upcoming Union Budget.

Himadri Speciality Chemical Ltd (HSCL) announced a 40% increase in net profit to Rs 123 crore for Q1FY25. The company stated that it expects to maintain this momentum throughout the year, supported by growth in both volume and margins. EBITDA increased by 43% YoY to approximately Rs 188 crores in Q1FY25, up from Rs 131 crore in the corresponding quarter of the previous fiscal year.



FIIs & Mutual Funds Flows Vs Nifty 50 25000 15000 24500 10000 5000 24000 0 23500 23000 -5000 22500 -10000 14-Jun-24 20-Jun-24 26-Jun-24 2-Jul-24 8-Jul-24 14-Jul-24 MFs - Equity (Net Inflows) Nifty 50 FII - Equity (Net Inflows) Source: FPI NSDL, SEBI, NSE

Source: NSE

Bajaj Auto reported a consolidated net profit of Rs 1,942 crore (attributable to shareholders of the company) for the quarter ended Jun 30, 2024, marking an 18% increase from Rs 1,644 crore reported in the year-ago period.

氲 Jio Financial Services, the non-banking arm of Reliance Industries, reported a 6% decrease in its consolidated net profit to Rs 313 crore for the quarter ending Jun 2024, down from Rs 332 crore a year earlier. This decline was primarily attributed to a decrease in interest income and an increase in operating expenses.



Institutional Flow	rs (Equity)			
				INR Cr.
Description	Net	MTD	QTD	YTD
FII*	3337.89	24,058	24,058	27,259
MF**	-45.72	5,536	5,536	196,962
DII*	-529.48	4,145	4,145	240,272

Source: SEBI, NSDL;*As on 16th Jul 2024;**As on 15th Jul 2024;

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F&O Trends

	Latest	Previous	Change %
Near Futures	24644.45	24621.70	0.09%
Near Basis	31.45	35.00	-10.14%
Mid Futures	24757.25	24736.30	0.08%
Mid Basis	144.25	149.60	-3.58%
Near Open Interest (Cr.)	1.44	1.43	0.55%
Mid Open Interest (Cr.)	0.21	0.20	8.09%
Rollover (%)	14.79	13.89	6.51%
Put Call Ratio (OI)	1.22	1.20	1.82%
Put Call Ratio(Vol)	0.87	0.84	3.72%
Source: NSE			

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3320	1985	36861
Index Options	1837758	1811559	364311
Stock Futures	32054	27265	322520
Stock Options	51924	51657	54536
Total	1925057	1892466	778227
Source: NSE			

Global Equity Market

Global Indices	17-Jul-24	1 Day	1 Week	1 Month	
Russell 1000 Index (U.S.)	3047.57	-1.43%	-0.45%	2.33%	
Nasdaq 100 (U.S.)	19799.14	-2.94%	-4.24%	-0.52%	
FTSE (U.K.)	8187.46	0.28%	-0.07%	0.56%	
DAX Index (Germany)	18437.30	-0.44%	0.16%	2.04%	
CAC 40 Index (France)	7570.81	-0.12%	-0.04%	-0.01%	
SSE Composite (China)	2962.85	-0.45%	0.80%	-1.76%	
Nikkei (Japan)	41097.69	-0.43%	-1.76%	7.86%	
Kospi (South Korea)	2843.29	-0.80%	-0.86%	3.61%	
HangSeng (Hong Kong)	17739.41	0.06%	1.53%	-1.10%	
Strait Times (Singapore)	3489.57	0.05%	0.86%	5.82%	
lbovespa Sao Paulo (Brazil)	129450.32	0.26%	1.75%	8.66%	
RTS Index (Russia)	NA	NA	NA	NA	
S&P/ASX 200 (Australia)	8057.90	0.73%	3.08%	4.64%	
Jakarta Composite (Indonesia)	7224.22	0.00%	-0.86%	7.27%	
KLSE (Malaysia)	1633.54	0.47%	0.94%	1.63%	
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.					



Global & Domestic Commodity Market

Commodity Prices	17-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm) ^[1]	73,320	0.42%	1.22%	2.41%
Gold (\$/oz)	2,458.38	-0.41%	3.68%	6.02%
Silver (INR/1 kg) ^[1]	91,848	0.26%	0.10%	4.70%
Silver (\$/oz)	30.29	-3.46%	-1.67%	2.71%
Brent Crude(\$/bbl)	87.24	-0.92%	-0.86%	4.42%
Crude Oil (INR/1 bbl) ^[1]	6,845.00	-0.33%	0.72%	4.22%
NYMEX Crude(\$/bbl)	84.06	2.74%	0.92%	3.48%
Natural Gas (INR/1 mmbtu) ^[1]	180.30	-7.35%	-7.87%	-27.06%
Aluminium (INR/1 kg) ^[1]	229.15	-0.74%	-0.59%	-2.43%
Copper (INR/1 kg) ^[1]	855.45	-0.93%	-0.82%	0.85%
Nickel (INR/1 kg) ^[1]	1,416.30	-0.18%	-2.73%	-4.05%
Lead (INR/1 kg) ^[1]	197.90	-0.33%	3.97%	3.48%
Zinc (INR/1 kg) ^[1]	277.40	-0.96%	0.65%	6.02%
Mentha Oil (INR/1 kg) ^[1]	961.50	-0.27%	-2.37%	-0.11%
Baltic Dry Index ^[1]	1,942	-2.56%	0.15%	-0.31%



Nifty 50 vs Gold (\$) vs US Dollar Index- Rebase to 100



Term of the Day

Double bottom and double top

Definition: Double top and double bottom are reversal chart patterns observed in the technical analysis of stocks, commodities, currencies and other assets.

Explanation

In double top, the chart pattern is found at the peak of an upward trend. The tops are peaks which are formed when the price hits a certain level. After hitting this level, the price will fall slightly, but then return back to touch the level again. If the price bounces back to that level again, then we have a double top. However, double bottom is the opposite chart pattern of the double top as it signals a reversal of the downtrend into an uptrend. This pattern will closely resemble the shape of a "W". The double bottom is formed when a downtrend sets a new low in the price movement.

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	4.56	18.93	34.54	17.56
Mid Cap Fund	3.88	26.84	54.45	24.72
Large & Mid Cap Fund	4.05	23.24	44.64	21.53
Small Cap Fund	4.67	21.89	49.44	25.25
Multi Cap Fund	4.19	22.54	47.11	22.75
Focused Fund	4.31	20.43	38.39	18.94
Value Fund	4.88	22.74	48.56	23.30
Contra Fund	4.83	23.72	49.16	25.26
ELSS	4.27	20.66	40.51	20.72
Equity Savings	1.79	8.20	15.81	9.65
Arbitrage Fund	0.51	3.66	7.53	5.53
Dividend Yield Fund	5.25	23.34	49.26	24.48
Aggressive Hybrid Fund	3.74	16.99	31.28	16.15
Balanced Advantage	2.97	12.40	24.51	12.84

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 16 Jul, 2024

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