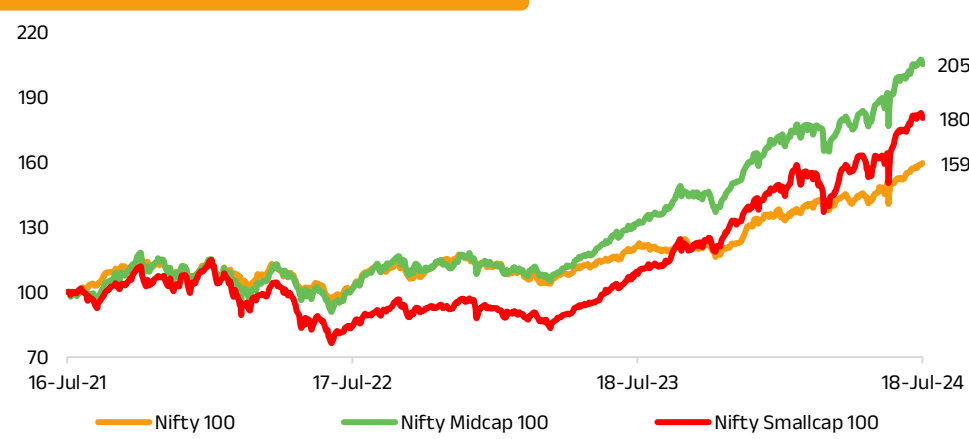


Broad Indices Historical Movement



Source: NSE

Broad Indices

	18-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,800.85	0.76%	1.99%	5.28%
Nifty 100	25,784.80	0.41%	1.38%	4.46%
Nifty 200	13,987.40	0.19%	1.15%	4.21%
Nifty 500	23,210.05	0.02%	0.89%	3.94%
Nifty Large Midcap 250	16,161.85	-0.26%	0.56%	3.25%
Nifty Midcap 150	21,255.60	-0.94%	-0.27%	2.14%
Nifty Next 50	73,112.50	-1.09%	-1.28%	1.06%
Nifty Smallcap 250	17,577.65	-1.11%	-0.65%	3.35%

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

Smart Beta Index

Index	18-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,828.15	-1.60%	-1.94%	-1.46%
NIFTY 500 Value 50	15,247.42	-0.56%	0.43%	3.45%
Nifty 200 Quality 30	21,901.00	0.12%	1.90%	5.74%
Nifty 50 Equal Weight	31,447.45	0.71%	2.24%	4.47%
NIFTY Alpha Low Volatility 30	29,210.50	0.16%	0.95%	4.22%
Nifty High Beta 50	4,272.31	-1.33%	-0.96%	1.42%
Nifty Low Volatility 50	24,831.40	0.52%	1.92%	5.50%
Nifty Midcap150 Momentum 50	64,449.10	-1.87%	-1.58%	0.87%
Nifty PSE	11,288.65	-1.37%	-1.06%	3.43%
Nifty SME Emerge	14,693.38	-1.68%	-1.98%	5.08%
Nifty 100 ESG	4,933.20	0.59%	1.94%	5.17%

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

Sector Indices

Index	18-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	25,576.70	0.37%	1.26%	-0.54%
Nifty Bank	52,620.70	0.43%	0.67%	4.32%
Nifty Consumption	11,526.25	0.44%	1.70%	2.46%
Nifty Financial	23,783.50	0.57%	0.78%	5.30%
Nifty FMCG	61,225.35	0.96%	2.87%	7.10%
Nifty Healthcare	13,194.70	0.27%	1.16%	5.13%
Nifty IT	40,010.40	2.22%	7.17%	14.96%
Nifty Media	2,009.65	-3.57%	-1.10%	-1.71%
Nifty Metal	9,636.95	-0.87%	-0.89%	-2.56%
Nifty MNC	30,980.65	-0.51%	0.04%	1.27%
Nifty Pharma	20,768.35	0.01%	0.81%	4.75%
Nifty Realty	1,122.70	-0.32%	1.15%	-2.40%
Nifty Energy	43,236.65	0.07%	1.12%	4.67%

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

Nifty 50 Top 5 Gainers

Company	18-Jul-24	Prev_Day	% Change	1 Week
TCS	4,315.55	4,178.45	3.28	9.99
ONGC	331.70	322.65	2.80	8.84
Wipro	573.20	559.70	2.41	7.32
SBI Life Insurance Company Limited	1,659.80	1,621.35	2.37	6.48
M&M	2,819.45	2,756.75	2.27	4.50

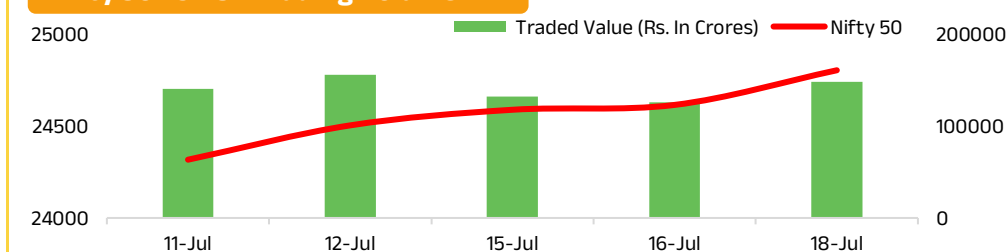
Source: NSE

Nifty 50 Top 5 Losers

Company	18-Jul-24	Prev_Day	% Change	1 Week
Asian Paints	2,931.55	2974	-1.44	-2.99
Coal India	505.25	512	-1.41	1.04
Hero Moto	5,502.20	5578	-1.36	-0.44
Grasim Indus	2,791.80	2827	-1.26	-0.35
Bajaj Auto	9,626.20	9718	-0.95	1.68

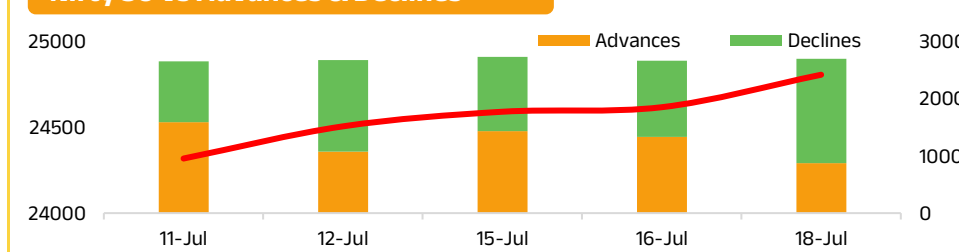
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

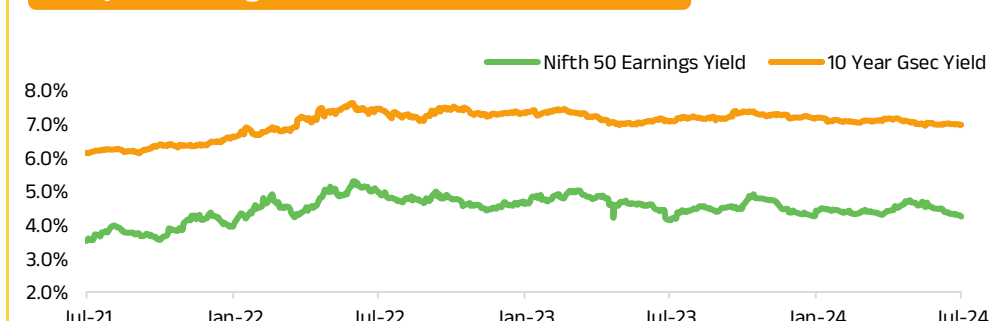
Indian equity markets recovered from initial losses and closed with healthy gains, as the key benchmark indices surged in the second half and reached record high levels, led by select information technology heavyweights in anticipation of healthy first quarter earnings of FY25.

Asian Paints reported a 24.5% decline in net profit during Q1FY25, attributed to sluggish demand caused by the general elections and intense heat waves. The leading paint manufacturer in the country witnessed a decrease in profits to Rs 1,170 crore, while the volume of its decorative paints business in India was recorded at 7%.

Mindtree reported a consolidated net profit of Rs 1,134 crore for the quarter ended Jun 30, 2024, which is a decrease of 1.5% compared to the Rs 1,152 crore reported in the previous year. The revenue from operations for the reported quarter stood at Rs 9,143 crore, higher by 5% YoY over Rs 8,702 crore reported in the corresponding quarter of the last financial year.

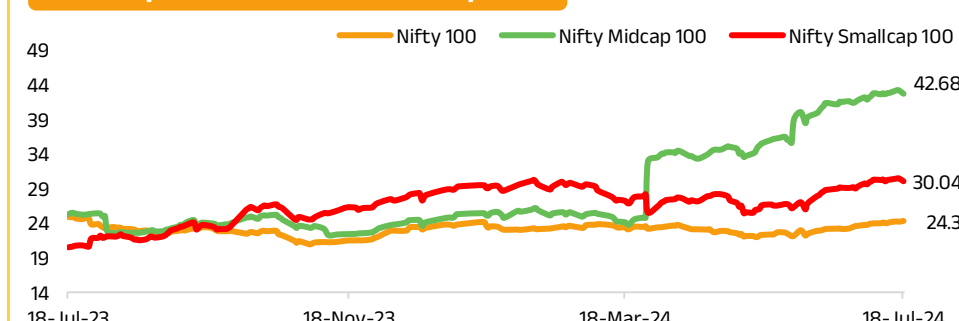
Hathway Cable & Datacom Ltd reported a decrease of 18.1% in consolidated net profit to Rs 18.32 crore for Q1FY25. The company had posted a net profit of Rs 22.36 crore in the Apr-Jun period a year ago. The total revenue for Q1FY25 remained unchanged at Rs. 502.61 crore, compared to Rs. 499.23 crore in the corresponding period a year ago.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



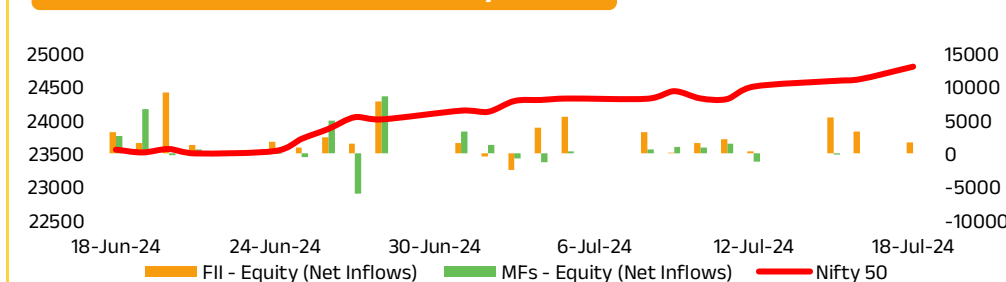
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1660.8	25,719	25,719	28,919
MF**	-148.98	5,433	5,433	196,859
DII	-2904.25	1,241	1,241	237,368

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

F&O Trends

	Latest	Previous	Change %
Near Futures	24809.00	24644.50	0.67%
Near Basis	8.20	31.45	-73.93%
Mid Futures	24924.20	24757.30	0.67%
Mid Basis	123.30	144.25	-14.52%
Near Open Interest (Cr.)	1.51	1.44	4.90%
Mid Open Interest (Cr.)	0.28	0.21	30.03%
Rollover (%)	17.40	14.79	17.62%
Put Call Ratio (OI)	1.27	1.25	1.62%
Put Call Ratio(Vol)	0.97	1.02	-4.06%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2115	2174	36285
Index Options	2839538	2858455	268360
Stock Futures	23512	26848	322983
Stock Options	51858	51474	57850
Total	2917023	2938951	685477

Source: NSE

Global Equity Market

Global Indices	18-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3022.13	-0.83%	-0.62%	1.23%
Nasdaq 100 (U.S.)	19705.09	-0.48%	-2.50%	-1.02%
FTSE (U.K.)	8204.89	0.21%	-0.22%	0.17%
DAX Index (Germany)	18354.76	-0.45%	-0.97%	1.23%
CAC 40 Index (France)	7586.55	0.21%	-0.53%	-0.55%
SSE Composite (China)	2977.13	0.48%	0.23%	-1.75%
Nikkei (Japan)	40126.35	-2.36%	-4.97%	4.27%
Kospi (South Korea)	2824.35	-0.67%	-2.32%	2.19%
HangSeng (Hong Kong)	17778.41	0.22%	-0.30%	-0.77%
Strait Times (Singapore)	3471.16	-0.53%	-0.11%	5.13%
Ibovespa Sao Paulo (Brazil)	127652.06	-1.39%	-0.50%	6.71%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8036.50	-0.27%	1.86%	3.32%
Jakarta Composite (Indonesia)	7321.07	1.34%	0.28%	8.70%
KLSE (Malaysia)	1633.81	0.02%	0.66%	1.72%

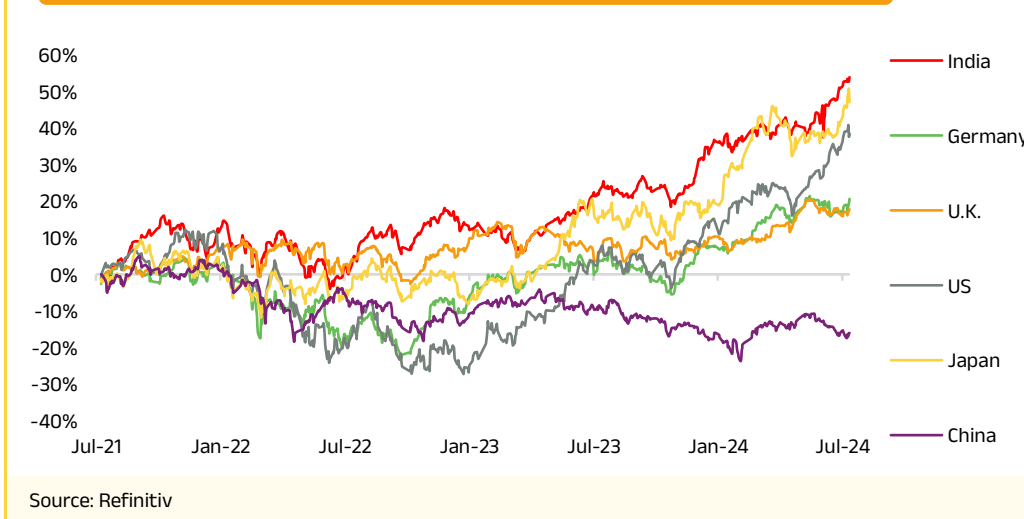
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

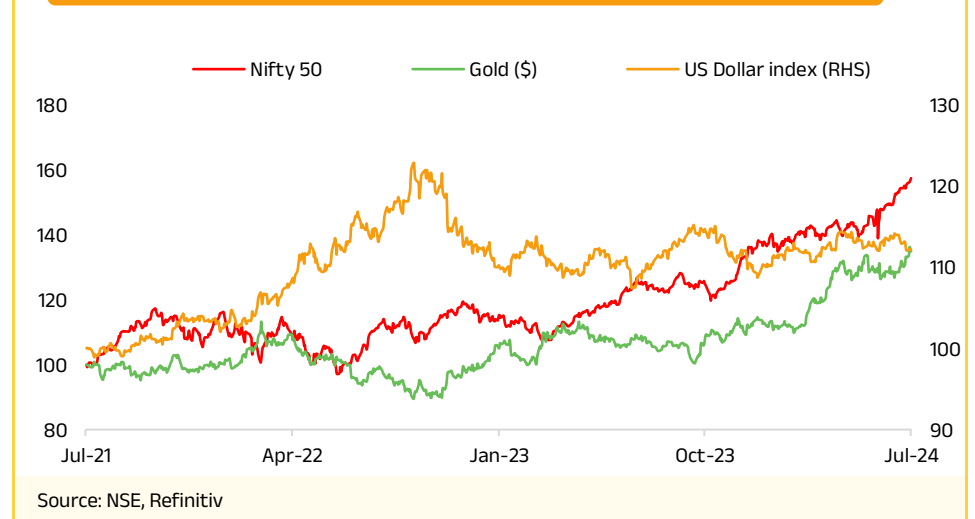
Commodity Prices	18-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	73,926	0.83%	1.93%	4.08%
Gold (\$/oz)	2,444.97	-0.55%	1.25%	5.01%
Silver (INR/1 kg)	91,324	-0.57%	-0.67%	4.48%
Silver (\$/oz)	30.04	-0.84%	-4.44%	1.76%
Brent Crude(\$/bbl)	87.75	0.58%	-0.17%	2.17%
Crude Oil (INR/1 bbl)	6,924.00	1.15%	1.01%	3.17%
NYMEX Crude(\$/bbl)	84.07	0.01%	0.30%	1.82%
Natural Gas (INR/1 mmbtu)	170.10	-5.66%	-12.54%	-26.96%
Aluminium (INR/1 kg)	225.95	-1.40%	-2.04%	-2.57%
Copper (INR/1 kg)	840.85	-1.71%	-3.39%	-0.20%
Nickel (INR/1 kg)	1,392.50	-1.68%	-3.13%	-5.03%
Lead (INR/1 kg)	196.70	-0.61%	-0.73%	1.39%
Zinc (INR/1 kg)	270.55	-2.47%	-3.56%	3.92%
Mentha Oil (INR/1 kg)	969.70	0.85%	-1.74%	0.93%
Baltic Dry Index ^[1]	1,890	-2.68%	-2.93%	-3.62%

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



Income shares

Definition: These are a class of capital shares which are offered by a dual-purpose fund that has little room for capital appreciation but gives the holder a portion of all income earned in the portfolio.



Explanation

Investors that own income shares receive dividends from the entire fund's performance. Those who invest in this class of stock are typically looking for steady income in the form of dividends instead of capital gains. An income share carries lower risk than a capital share. The fund's two kinds of potential cash flows allow individual investors to choose classes that are more in line with their investment objectives.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	4.40	19.72	34.79	17.66
Mid Cap Fund	2.22	26.06	53.22	24.34
Large & Mid Cap Fund	3.08	23.12	44.13	21.36
Small Cap Fund	3.17	21.08	48.69	24.88
Multi Cap Fund	3.12	22.29	46.52	22.53
Focused Fund	3.62	20.65	38.18	18.89
Value Fund	4.32	22.84	48.36	23.23
Contra Fund	4.14	24.15	49.18	25.25
ELSS	3.42	20.68	40.20	20.59
Equity Savings	1.67	8.41	15.75	9.65
Arbitrage Fund	0.56	3.76	7.48	5.53
Dividend Yield Fund	4.63	23.61	48.96	24.40
Aggressive Hybrid Fund	3.24	17.15	31.12	16.11
Balanced Advantage	2.71	12.79	24.57	12.85

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 17 Jul, 2024

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.