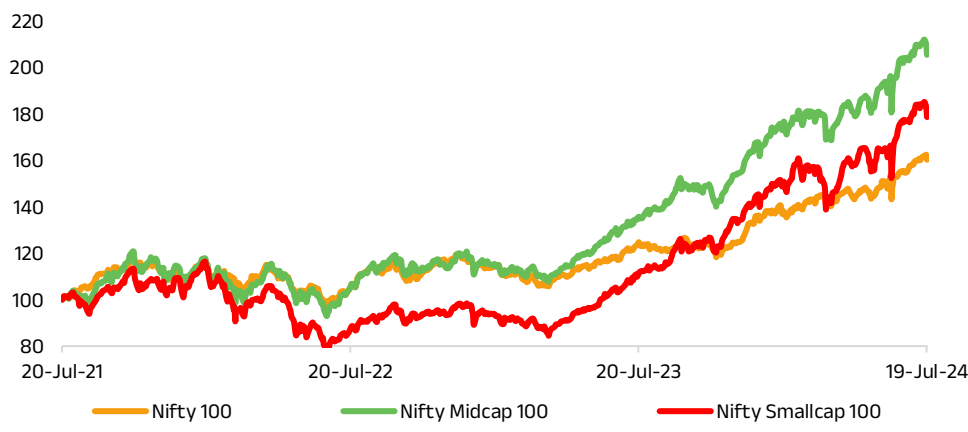


Broad Indices Historical Movement



Source: NSE

Broad Indices

	19-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,530.90	-1.09%	0.12%	4.32%
Nifty 100	25,450.85	-1.30%	-0.49%	3.46%
Nifty 200	13,788.15	-1.42%	-0.77%	3.18%
Nifty 500	22,853.60	-1.54%	-1.05%	2.83%
Nifty Large Midcap 250	15,889.15	-1.69%	-1.39%	2.24%
Nifty Midcap 150	20,812.25	-2.09%	-2.29%	1.07%
Nifty Next 50	71,353.00	-2.41%	-3.23%	-0.26%
Nifty Smallcap 250	17,163.40	-2.36%	-2.92%	1.30%

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

Smart Beta Index

Index	19-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	34,722.40	-3.09%	-4.27%	-2.80%
NIFTY 500 Value 50	14,807.06	-2.89%	-2.44%	1.47%
Nifty 200 Quality 30	21,653.20	-1.13%	-0.31%	5.66%
Nifty 50 Equal Weight	30,950.30	-1.58%	-0.07%	3.68%
NIFTY Alpha Low Volatility 30	28,709.95	-1.71%	-0.81%	3.74%
Nifty High Beta 50	4,155.65	-2.73%	-3.39%	-0.50%
Nifty Low Volatility 50	24,494.61	-1.36%	-0.02%	4.80%
Nifty Midcap150 Momentum 50	62,890.10	-2.42%	-3.63%	-0.25%
Nifty PSE	10,929.00	-3.19%	-3.92%	2.35%
Nifty SME Emerge	14,408.35	-1.94%	-3.18%	3.11%
Nifty 100 ESG	4,869.20	-1.30%	-0.17%	4.06%

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

Sector Indices

Index	19-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	24,963.35	-2.40%	-0.72%	-1.65%
Nifty Bank	52,265.60	-0.67%	-0.03%	1.69%
Nifty Consumption	11,394.30	-1.14%	0.41%	2.49%
Nifty Financial	23,596.35	-0.79%	-0.03%	2.84%
Nifty FMCG	61,087.90	-0.22%	2.28%	7.84%
Nifty Healthcare	12,967.65	-1.72%	-0.59%	4.23%
Nifty IT	39,923.30	-0.22%	2.31%	14.30%
Nifty Media	1,962.95	-2.32%	-5.36%	-2.74%
Nifty Metal	9,256.30	-3.95%	-4.65%	-5.29%
Nifty MNC	30,454.95	-1.70%	-1.34%	0.86%
Nifty Pharma	20,425.40	-1.65%	-0.91%	3.98%
Nifty Realty	1,096.20	-2.36%	0.27%	-1.92%
Nifty Energy	42,062.80	-2.71%	-1.83%	3.60%

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

Nifty 50 Top 5 Gainers

Company	19-Jul-24	Prev_Day	% Change	1 Week
Infosys	1,792.95	1,758.05	1.99	4.74
ITC	474.55	470.25	0.91	3.38
Asian Paints	2,946.05	2,931.55	0.49	-1.77
Britannia Industries Limited	5,877.95	5,871.50	0.11	1.57
NA	NA	NA	NA	NA

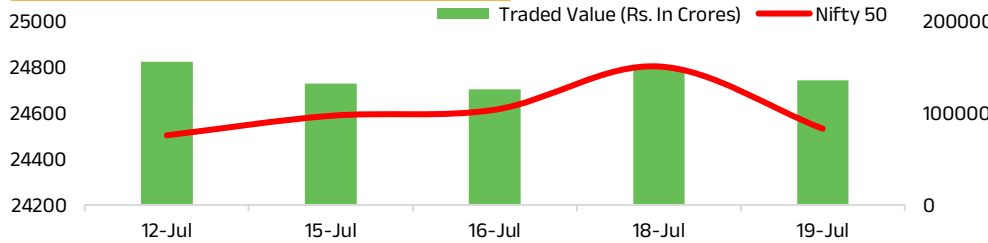
Source: NSE

Nifty 50 Top 5 Losers

Company	19-Jul-24	Prev_Day	% Change	1 Week
BPCL	303.80	318	-4.51	-0.25
JSW Steel	889.45	931	-4.51	-4.81
Hindalco	663.00	690	-3.91	-4.20
ONGC	319.65	332	-3.63	4.09
NTPC	364.65	378	-3.47	-3.31

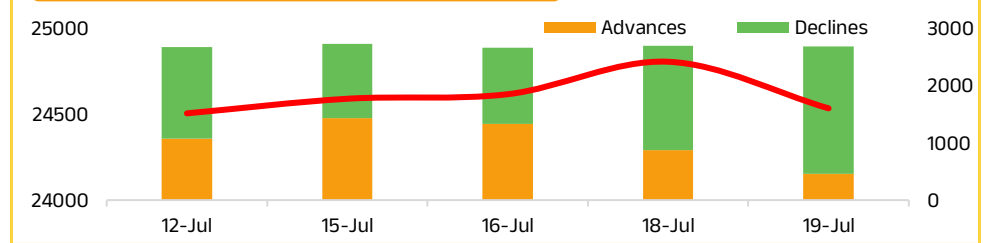
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

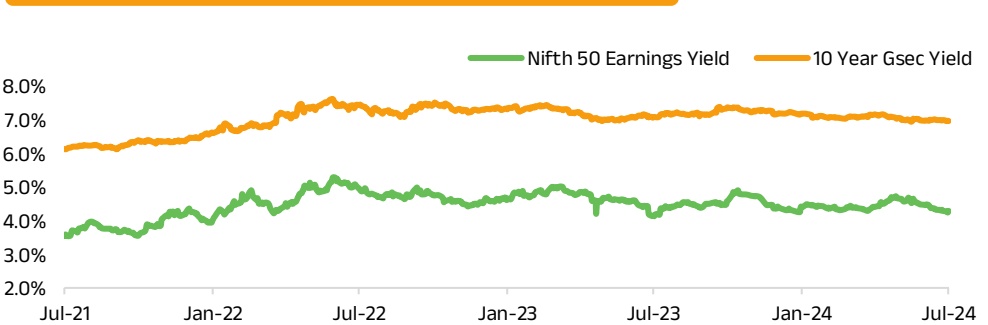
Indian equity markets witnessed significant losses amid weak global cues. The key benchmark indices fell towards southwards due to sell-off across the sectors as investors preferred to book profits ahead of the Union Budget 2024.

Infosys announced a consolidated Profit After Tax (PAT) of Rs. 6,368 crores for the quarter ended Jun 2024, the figure saw a 7.1% uptick from the prior year's Rs. 5,945 crores. The revenue from operations for the quarter was Rs. 39,315 crores, up by 3.6% from Rs. 37,933 crores in the Q1 of FY24.

JSW Steel announced a 64% decrease in its consolidated net profit to Rs 845 crore for Q1FY25, falling short of the expected Rs 1,254 crore. Meanwhile, the revenue from operations for the Jun quarter rose by 2% YoY to Rs 42,943 crore. EBITDA for the reporting quarter fell 22% YoY to Rs 5,510 crore, while margins declined 390 basis points to 12.8%.

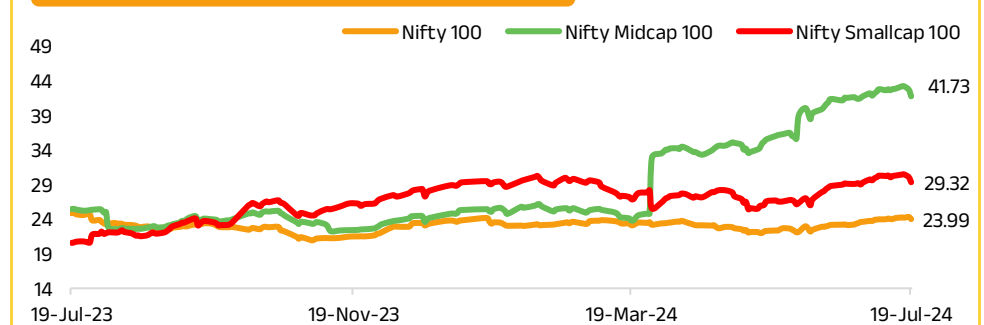
UltraTech Cement disclosed a consolidated net profit of Rs 1,697 crore for the quarter ending on Jun 30, 2024, which is a slight uptick of 0.50% compared to the Rs 1,688 crore reported in the same period last year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



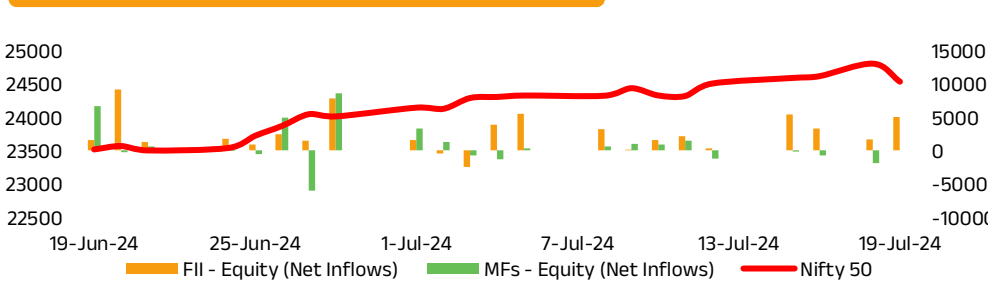
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	5052.87	30,772	30,772	33,972
MF**	-1899.11	2,758	2,758	194,183
DII	-461.56	779	779	236,906

Source: SEBI, NSDL;**As on 18th Jul 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	24529.10	24809.00	-1.13%
Near Basis	-1.80	8.20	-121.95%
Mid Futures	24657.20	24924.20	-1.07%
Mid Basis	126.30	123.30	2.43%
Near Open Interest (Cr.)	1.41	1.51	-6.22%
Mid Open Interest (Cr.)	0.32	0.28	14.05%
Rollover (%)	20.33	17.40	16.85%
Put Call Ratio (OI)	1.11	1.27	-12.95%
Put Call Ratio(Vol)	1.13	0.97	15.67%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	8178	5583	40981
Index Options	3192481	3150753	237632
Stock Futures	48159	40603	333142
Stock Options	69268	70897	59838
Total	3318087	3267837	671594

Source: NSE

Global Equity Market

Global Indices	19-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3002.53	-0.65%	-1.83%	0.58%
Nasdaq 100 (U.S.)	19522.62	-0.93%	-3.98%	-1.94%
FTSE (U.K.)	8155.72	-0.60%	-1.18%	-0.60%
DAX Index (Germany)	18171.93	-1.00%	-3.07%	0.58%
CAC 40 Index (France)	7534.52	-0.69%	-2.46%	-0.47%
SSE Composite (China)	2982.31	0.17%	0.37%	-1.18%
Nikkei (Japan)	40063.79	-0.16%	-2.74%	3.87%
Kospi (South Korea)	2795.46	-1.02%	-2.15%	-0.07%
HangSeng (Hong Kong)	17417.68	-2.03%	-4.79%	-5.49%
Strait Times (Singapore)	3447.56	-0.68%	-1.44%	4.35%
Ibovespa Sao Paulo (Brazil)	127616.46	-0.03%	-0.99%	6.12%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7971.60	-0.81%	0.15%	2.60%
Jakarta Composite (Indonesia)	7294.49	-0.36%	-0.45%	8.44%
KLSE (Malaysia)	1636.55	0.17%	1.08%	2.30%

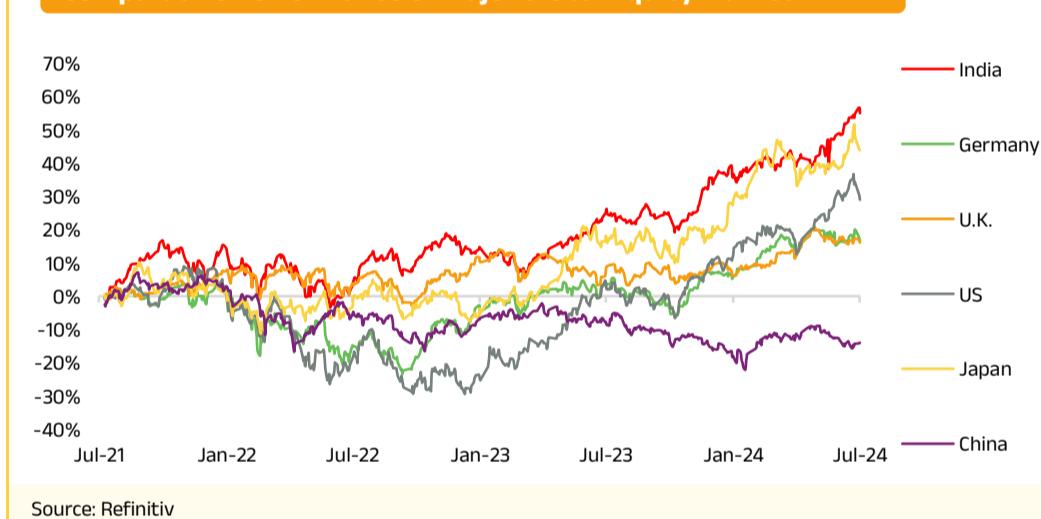
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

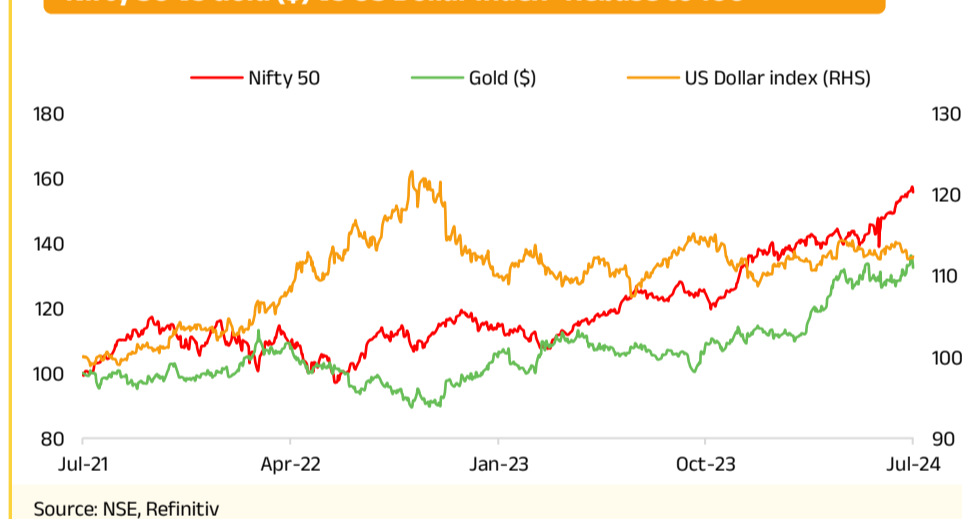
Commodity Prices	19-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	73,168	-1.03%	0.58%	2.29%
Gold (\$/oz)	2,400.79	-1.81%	-0.43%	3.21%
Silver (INR/1 kg)	88,885	-2.67%	-2.87%	0.84%
Silver (\$/oz)	29.26	-4.69%	-4.91%	-0.66%
Brent Crude(\$/bbl)	86.67	-1.23%	-2.40%	0.03%
Crude Oil (INR/1 bbl)	6,927.00	0.04%	0.36%	1.72%
NYMEX Crude(\$/bbl)	81.33	-3.26%	-2.47%	-1.50%
Natural Gas (INR/1 mmbtu)	177.70	4.47%	-6.23%	-26.81%
Aluminium (INR/1 kg)	224.15	-0.80%	-2.97%	-3.69%
Copper (INR/1 kg)	823.15	-2.11%	-4.23%	-3.26%
Nickel (INR/1 kg)	1,379.20	-0.96%	-3.60%	-6.42%
Lead (INR/1 kg)	195.00	-0.86%	-1.52%	0.57%
Zinc (INR/1 kg)	269.10	-0.54%	-2.99%	1.93%
Mentha Oil (INR/1 kg)	970.00	0.03%	0.01%	2.59%
Baltic Dry Index	1,902	-0.52%	-4.76%	-2.11%

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



Securities Transaction Tax

Definition: Securities Transaction Tax (STT) refers to the tax levied on transaction (purchase or sale) of securities listed on the Indian stock exchange. Such securities include equity shares, derivatives and equity-oriented mutual fund units. The rate is specified by the Central Government from time to time.



Explanation

STT is levied at the rate of 0.100% on purchase or sale of equity shares in a company, where such contract is settled by the actual delivery or transfer of such share or unit. However, for sale of a unit of an equity-oriented fund, where such contract is settled by the actual delivery or transfer of such share or unit, the rate has been revised to 0.001% with effect from June 1, 2013. The same shall be borne by the seller. Meanwhile, the rate of STT is 0.025% for sale of equity shares or a unit of equity-oriented fund, where such contract is settled other than by the actual delivery or transfer of such share or unit.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.44	17.09	32.47	17.53
Mid Cap Fund	1.05	22.11	49.32	23.72
Large & Mid Cap Fund	2.05	19.85	41.05	20.99
Small Cap Fund	1.56	17.76	44.68	24.14
Multi Cap Fund	1.82	18.91	42.94	22.05
Focused Fund	2.52	17.82	35.46	18.66
Value Fund	3.21	19.71	45.37	22.93
Contra Fund	3.38	21.59	46.82	25.05
ELSS	2.11	17.61	37.14	20.20
Equity Savings	1.35	7.67	15.12	9.60
Arbitrage Fund	0.63	3.84	7.66	5.56
Dividend Yield Fund	3.83	20.55	46.36	23.94
Aggressive Hybrid Fund	2.37	14.99	29.14	15.91
Balanced Advantage	2.08	11.11	23.15	12.62

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.

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.