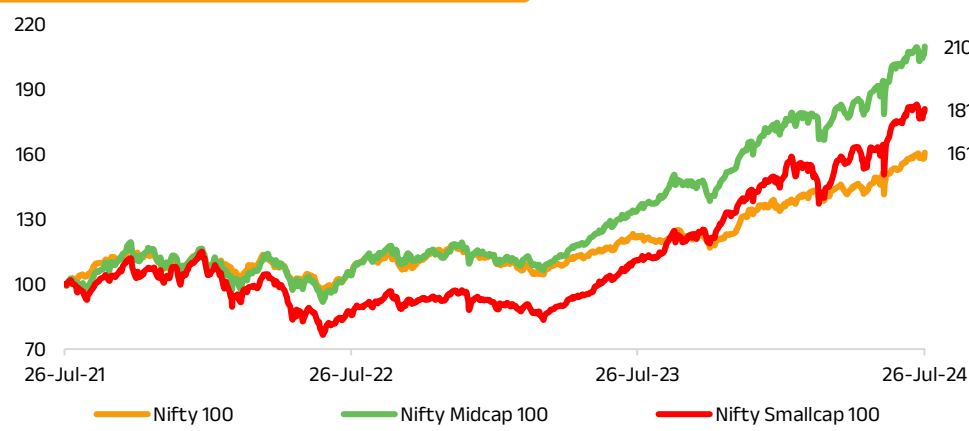


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

|                        | 26-Jul-24 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|-------|--------|---------|
| Nifty 50               | 24,834.85 | 1.76% | 1.24%  | 4.05%   |
| Nifty 100              | 25,841.90 | 1.71% | 1.54%  | 3.92%   |
| Nifty 200              | 14,039.20 | 1.73% | 1.82%  | 4.02%   |
| Nifty 500              | 23,292.05 | 1.64% | 1.92%  | 3.81%   |
| Nifty Large Midcap 250 | 16,250.35 | 1.71% | 2.27%  | 3.79%   |
| Nifty Midcap 150       | 21,442.40 | 1.72% | 3.03%  | 3.68%   |
| Nifty Next 50          | 73,400.65 | 1.65% | 2.87%  | 3.04%   |
| Nifty Smallcap 250     | 17,647.40 | 0.94% | 2.82%  | 3.23%   |

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

## Smart Beta Index

| Index                         | 26-Jul-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|-------|--------|---------|
| Nifty 200 Momentum 30 Index   | 36,180.35 | 2.63% | 4.20%  | 2.60%   |
| NIFTY 500 Value 50            | 15,252.50 | 1.58% | 3.01%  | 4.91%   |
| Nifty 200 Quality 30          | 22,068.45 | 1.61% | 1.92%  | 7.57%   |
| Nifty 50 Equal Weight         | 31,705.45 | 2.19% | 2.44%  | 5.88%   |
| NIFTY Alpha Low Volatility 30 | 29,521.00 | 1.52% | 2.82%  | 6.06%   |
| Nifty High Beta 50            | 4,239.09  | 2.49% | 2.01%  | 1.62%   |
| Nifty Low Volatility 50       | 24,988.95 | 1.32% | 2.02%  | 6.30%   |
| Nifty Midcap150 Momentum 50   | 64,192.45 | 1.61% | 2.07%  | 2.39%   |
| Nifty PSE                     | 11,404.05 | 1.48% | 4.35%  | 8.17%   |
| Nifty SME Emerge              | 15,079.62 | 1.04% | 4.66%  | 4.77%   |
| Nifty 100 ESG                 | 4,954.95  | 1.86% | 1.76%  | 5.05%   |

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

## Sector Indices

| Index             | 26-Jul-24 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|-------|--------|---------|
| Nifty Auto        | 26,250.70 | 2.43% | 5.16%  | 4.92%   |
| Nifty Bank        | 51,295.95 | 0.80% | -1.86% | -2.98%  |
| Nifty Consumption | 11,760.70 | 1.93% | 3.22%  | 6.04%   |
| Nifty Financial   | 23,316.70 | 1.16% | -1.19% | -1.17%  |
| Nifty FMCG        | 62,728.80 | 0.95% | 2.69%  | 11.09%  |
| Nifty Healthcare  | 13,702.35 | 2.73% | 5.67%  | 10.60%  |
| Nifty IT          | 40,977.35 | 2.30% | 2.64%  | 15.73%  |
| Nifty Media       | 2,075.65  | 1.68% | 5.74%  | 2.58%   |
| Nifty Metal       | 9,423.40  | 3.01% | 1.81%  | -2.99%  |
| Nifty MNC         | 30,927.35 | 1.15% | 1.55%  | 2.62%   |
| Nifty Pharma      | 21,603.10 | 2.36% | 5.77%  | 10.53%  |
| Nifty Realty      | 1,077.65  | 1.15% | -1.69% | -1.99%  |
| Nifty Energy      | 43,238.30 | 1.09% | 2.79%  | 5.92%   |

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

## Nifty 50 Top 5 Gainers

| Company           | 26-Jul-24 | Prev_Day | % Change | 1 Week |
|-------------------|-----------|----------|----------|--------|
| Divi's Lab        | 4,790.60  | 4,547.00 | 5.36     | 5.99   |
| Cipla             | 1,575.00  | 1,500.05 | 5.00     | 6.02   |
| Bharti Airtel     | 1,514.40  | 1,449.15 | 4.50     | 3.60   |
| Adani Ports & SEZ | 1,542.75  | 1,487.00 | 3.75     | 5.00   |
| Wipro             | 524.80    | 506.85   | 3.54     | -5.81  |

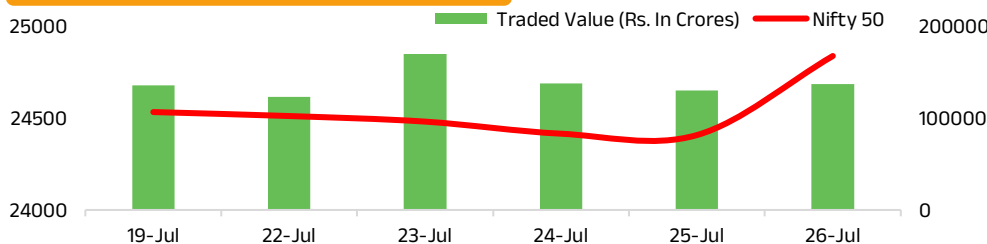
Source: NSE

## Nifty 50 Top 5 Losers

| Company        | 26-Jul-24 | Prev_Day | % Change | 1 Week |
|----------------|-----------|----------|----------|--------|
| ONGC           | 331.60    | 336      | -1.25    | 3.74   |
| Tata Beverages | 1,213.65  | 1224     | -0.81    | 2.16   |
| Indian Oil     | 176.55    | 177      | -0.17    | 6.68   |
| NA             | NA        | NA       | NA       | NA     |
| NA             | NA        | NA       | NA       | NA     |

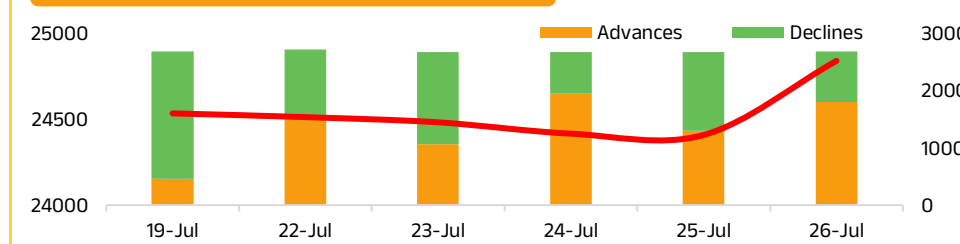
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

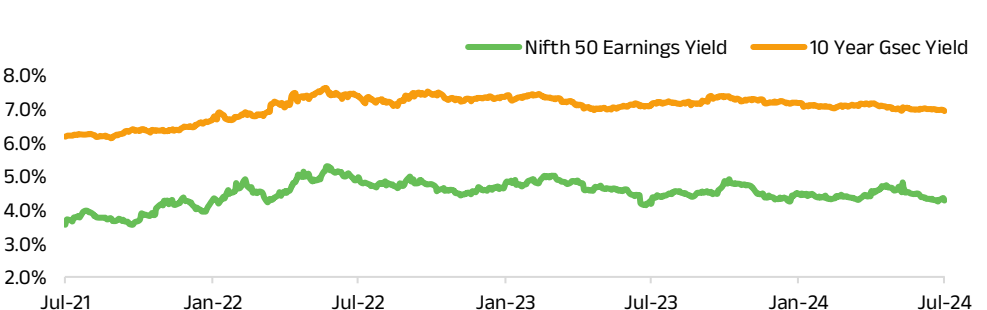
Indian equity markets snapped its five-day losing streak and closed with healthy gains amid positive global cues. The key benchmark indices rallied and reached fresh high supported by all-round buying across the sectors as investors went for value buying following the recent fall. Sentiments were boosted following the faster-than-expected U.S. GDP growth data.

Cipla announced a 17.4% increase in net profit to Rs. 1,178 crore in Q1FY2025. This growth was primarily driven by robust sales performance in the U.S., India, and South Africa. The company reported Rs. 1,003 crore net profit during the corresponding period of the previous year. Revenue from operations rose 7% YoY to Rs. 6,694 crore in Q1FY25 compared to Rs. 6,258 crore in Q1FY24.

Shriram Finance announced a consolidated net profit of Rs. 2,022.8 crore (attributable to owners of the company) for Q1FY25. The company's profit increased by 19% compared to the Rs. 1,705 crore reported in the same period last year. However, net profit after tax for the period from total operations stood at Rs. 2,031 crore.

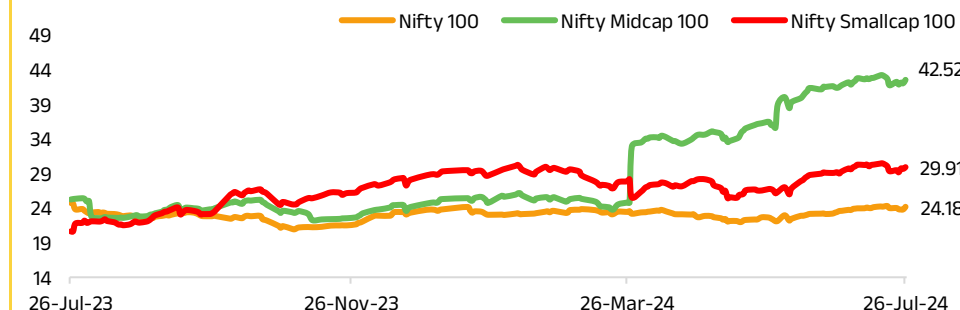
DLF Ltd announced a 23% increase in its consolidated net profit to Rs 646 crore for Q1FY25. This marks a significant rise from Rs. 527 crore in the corresponding quarter of the previous year. Revenue from operations in the reporting quarter fell 4% YoY to Rs. 1,362 crore against Rs. 1,423 crore in the same quarter of the previous year.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



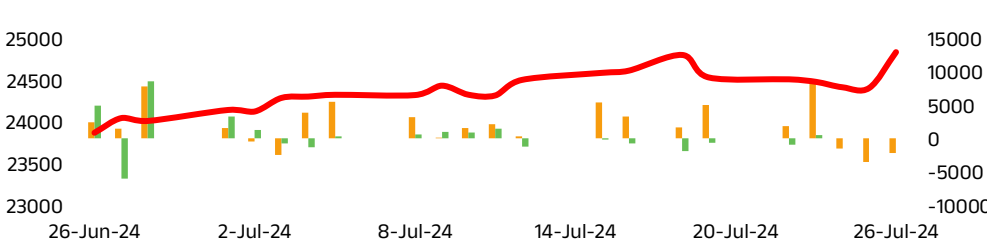
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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         | -2197.78 | 33,688 | 33,688 | 36,888  |
| MF**        | 542.05   | 1,707  | 1,707  | 193,133 |
| DII         | 2774.31  | 8,889  | 8,889  | 245,016 |

Source: SEBI, NSDL; \*\*As on 23rd Jul 2024;

## F&O Trends

|                          | Latest   | Previous | Change %  |
|--------------------------|----------|----------|-----------|
| Near Futures             | 24915.50 | 24405.30 | 2.09%     |
| Near Basis               | 80.60    | -0.85    | -9582.35% |
| Mid Futures              | 25022.70 | 24455.40 | 2.32%     |
| Mid Basis                | 187.80   | 49.30    | 280.93%   |
| Near Open Interest (Cr.) | 1.43     | 0.60     | 138.12%   |
| Mid Open Interest (Cr.)  | 0.09     | 1.30     | -92.85%   |
| Rollover (%)             | 6.63     | 69.69    | -90.49%   |
| Put Call Ratio (OI)      | 1.36     | 1.01     | 34.53%    |
| Put Call Ratio(Vol)      | 0.82     | 0.88     | -6.29%    |

Source: NSE

## FII Derivative Trade Statistics

|               | Buy     | Sell    | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 11348   | 14436   | 30363     |
| Index Options | 2778767 | 2799625 | 254227    |
| Stock Futures | 62899   | 64399   | 312983    |
| Stock Options | 10747   | 13954   | 9372      |
| Total         | 2863762 | 2892414 | 606945    |

Source: NSE

## Global Equity Market

| Global Indices                | 26-Jul-24 | 1 Day  | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.)     | 2982.14   | 1.13%  | -0.68% | 0.02%   |
| Nasdaq 100 (U.S.)             | 19023.66  | 1.03%  | -2.56% | -3.68%  |
| FTSE (U.K.)                   | 8285.71   | 1.21%  | 1.59%  | 0.73%   |
| DAX Index (Germany)           | 18417.55  | 0.65%  | 1.35%  | 1.44%   |
| CAC 40 Index (France)         | 7517.68   | 1.22%  | -0.22% | -1.20%  |
| SSE Composite (China)         | 2890.90   | 0.14%  | -3.07% | -2.75%  |
| Nikkei (Japan)                | 37667.41  | -0.53% | -5.98% | -5.04%  |
| Kospi (South Korea)           | 2731.90   | 0.78%  | -2.27% | -2.15%  |
| HangSeng (Hong Kong)          | 17021.31  | 0.10%  | -2.28% | -5.91%  |
| Strait Times (Singapore)      | 3426.47   | -0.12% | -0.61% | 2.84%   |
| Ibovespa Sao Paulo (Brazil)   | 127492.49 | 1.22%  | -0.10% | 3.96%   |
| RTS Index (Russia)            | NA        | NA     | NA     | NA      |
| S&P/ASX 200 (Australia)       | 7921.30   | 0.76%  | -0.63% | 1.78%   |
| Jakarta Composite (Indonesia) | 7288.17   | 0.66%  | -0.09% | 5.54%   |
| KLSE (Malaysia)               | 1612.88   | -0.14% | -1.45% | 1.38%   |

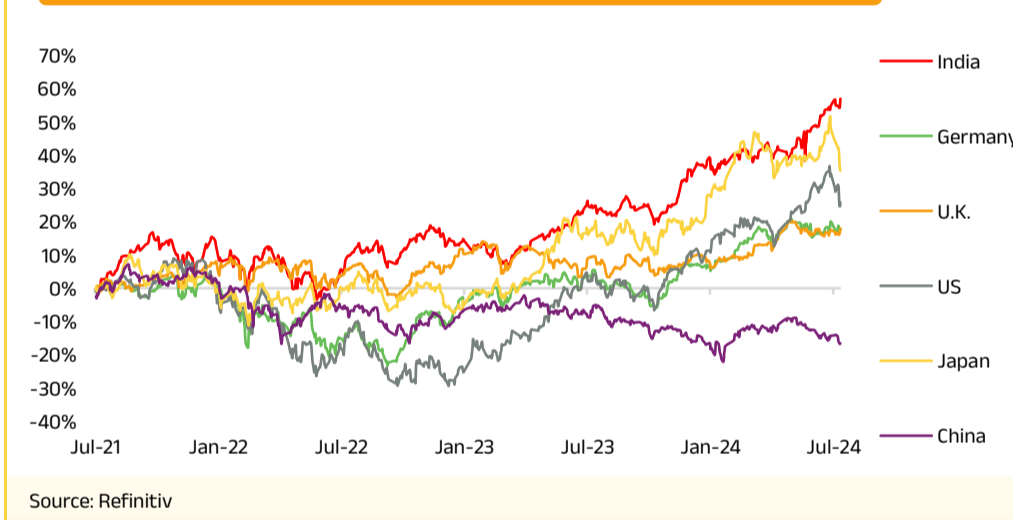
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

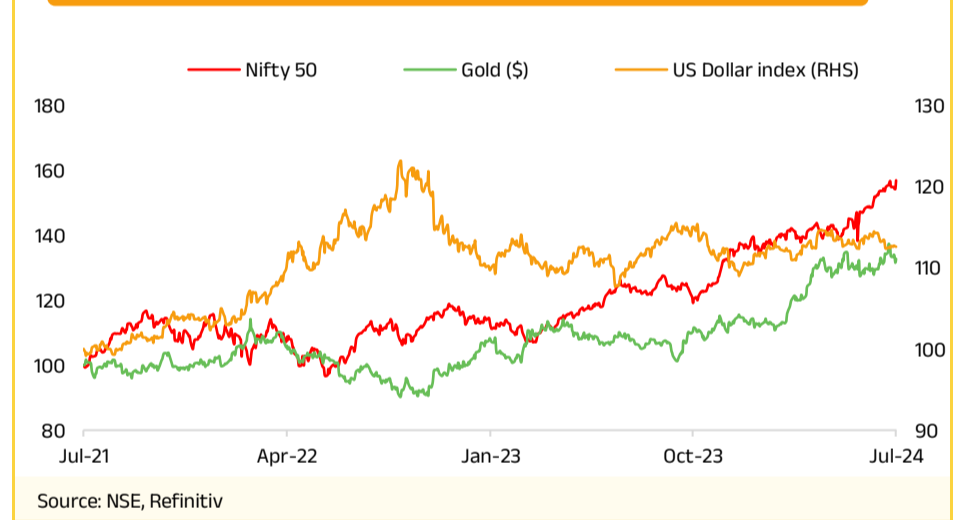
| Commodity Prices          | 26-Jul-24 | 1 Day  | 1 Week | 1 Month |
|---------------------------|-----------|--------|--------|---------|
| Gold (INR/10 gm)          | 67,884    | -0.15% | -7.22% | -4.49%  |
| Gold (\$/oz)              | 2,385.57  | 0.89%  | -0.63% | 3.81%   |
| Silver (INR/1 kg)         | 81,181    | -0.39% | -8.67% | -6.31%  |
| Silver (\$/oz)            | 27.89     | -0.28% | -4.68% | -3.02%  |
| Brent Crude(\$/bbl)       | 82.59     | -1.88% | -4.71% | -5.34%  |
| Crude Oil (INR/1 bbl)     | 6,553.00  | 0.89%  | -5.40% | -2.82%  |
| NYMEX Crude(\$/bbl)       | 78.43     | -1.07% | -3.57% | -4.46%  |
| Natural Gas (INR/1 mmbtu) | 170.80    | -3.61% | -3.88% | -25.71% |
| Aluminium (INR/1 kg)      | 213.40    | -0.07% | -4.80% | -7.36%  |
| Copper (INR/1 kg)         | 806.20    | 1.99%  | -2.06% | -3.89%  |
| Nickel (INR/1 kg)         | 1,337.00  | 0.72%  | -3.06% | -8.37%  |
| Lead (INR/1 kg)           | 197.70    | 2.28%  | 1.38%  | 2.36%   |
| Zinc (INR/1 kg)           | 257.30    | 0.45%  | -4.38% | -3.96%  |
| Mentha Oil (INR/1 kg)     | 976.60    | 0.71%  | 0.68%  | 4.07%   |
| Baltic Dry Index          | 1,808     | -1.42% | -4.94% | -7.94%  |

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



### Double Dip Recession

Definition: When an economy or a country's Gross Domestic Product (GDP) growth is negative for the second time following a short period of positive growth, the phenomenon is termed as double dip recession.



### Explanation

This type of pattern or movement is extremely damaging for an economy. It hits the confidence of consumers and businesses in the country. Due to this, double dip recession may sometimes lead to a prolonged period of recession before final recovery. The first recession often leads to layoffs and spending cuts, as a result of which the demand for goods and services fall, leading to the second recession.

## Mutual Fund Category Performance - Equity & Hybrid

| Category               | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund         | 3.89    | 20.20   | 34.54  | 17.85  |
| Mid Cap Fund           | 3.54    | 27.18   | 53.06  | 24.68  |
| Large & Mid Cap Fund   | 3.40    | 23.80   | 43.60  | 21.61  |
| Small Cap Fund         | 3.54    | 22.11   | 48.66  | 25.25  |
| Multi Cap Fund         | 3.55    | 22.74   | 45.78  | 22.74  |
| Focused Fund           | 3.35    | 21.21   | 37.56  | 19.05  |
| Value Fund             | 4.29    | 22.92   | 47.36  | 23.51  |
| Contra Fund            | 3.93    | 24.63   | 48.47  | 25.52  |
| ELSS                   | 3.35    | 21.27   | 39.71  | 20.88  |
| Equity Savings         | 1.57    | 8.59    | 15.60  | 9.73   |
| Arbitrage Fund         | 0.59    | 3.69    | 7.55   | 5.54   |
| Dividend Yield Fund    | 5.05    | 23.35   | 48.63  | 24.51  |
| Aggressive Hybrid Fund | 3.13    | 17.69   | 30.88  | 16.33  |
| Balanced Advantage     | 2.69    | 12.93   | 24.57  | 12.93  |

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.**