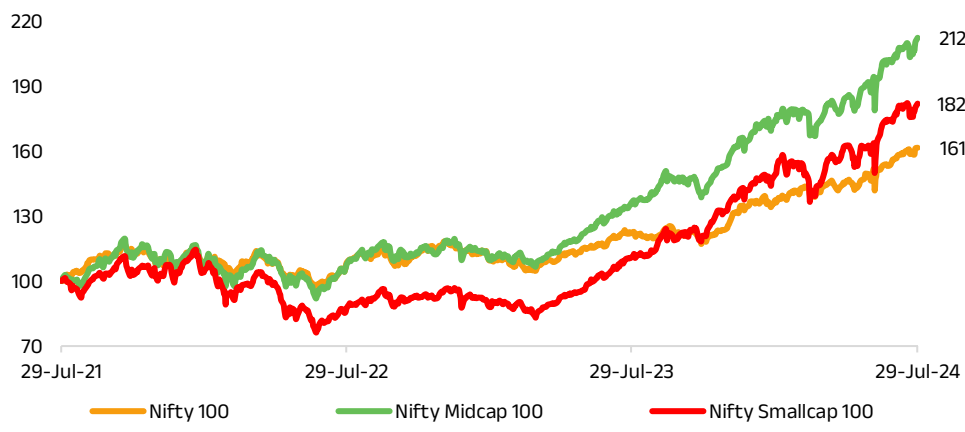


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	29-Jul-24	1 Day	1 Week	1 Month
Nifty 50	24,836.10	0.01%	1.33%	3.44%
Nifty 100	25,901.95	0.23%	1.61%	3.58%
Nifty 200	14,089.80	0.36%	1.85%	3.76%
Nifty 500	23,394.20	0.44%	1.97%	3.70%
Nifty Large Midcap 250	16,345.65	0.59%	2.24%	3.74%
Nifty Midcap 150	21,644.85	0.94%	2.87%	3.90%
Nifty Next 50	74,288.30	1.21%	2.80%	3.87%
Nifty Smallcap 250	17,836.55	1.07%	3.00%	4.24%

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

## Smart Beta Index

Index	29-Jul-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,637.15	1.26%	3.87%	3.79%
NIFTY 500 Value 50	15,432.46	1.18%	2.86%	4.74%
Nifty 200 Quality 30	22,158.20	0.41%	1.92%	7.14%
Nifty 50 Equal Weight	31,724.75	0.06%	2.46%	4.85%
NIFTY Alpha Low Volatility 30	29,598.20	0.26%	2.48%	5.56%
Nifty High Beta 50	4,312.62	1.73%	2.42%	3.06%
Nifty Low Volatility 50	24,983.32	-0.02%	1.80%	5.37%
Nifty Midcap150 Momentum 50	65,038.75	1.32%	2.57%	3.64%
Nifty PSE	11,537.60	1.17%	3.68%	7.97%
Nifty SME Emerge	15,099.33	0.13%	4.37%	5.62%
Nifty 100 ESG	4,964.30	0.19%	1.73%	4.58%

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

## Sector Indices

Index	29-Jul-24	1 Day	1 Week	1 Month
Nifty Auto	26,426.55	0.67%	4.66%	4.86%
Nifty Bank	51,406.25	0.22%	-1.67%	-1.79%
Nifty Consumption	11,750.70	-0.09%	2.60%	5.56%
Nifty Financial	23,315.30	-0.01%	-1.32%	-0.45%
Nifty FMCG	62,513.85	-0.34%	2.68%	10.14%
Nifty Healthcare	13,725.60	0.17%	4.69%	9.14%
Nifty IT	40,820.10	-0.38%	2.63%	12.90%
Nifty Media	2,113.05	1.80%	8.16%	6.06%
Nifty Metal	9,450.30	0.29%	1.07%	-3.71%
Nifty MNC	31,129.55	0.65%	1.41%	2.53%
Nifty Pharma	21,674.95	0.33%	5.01%	9.85%
Nifty Realty	1,093.05	1.43%	0.20%	-1.06%
Nifty Energy	43,438.70	0.46%	3.56%	3.95%

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

## Nifty 50 Top 5 Gainers

Company	29-Jul-24	Prev_Day	% Change	1 Week
Divi's Lab	4,923.85	4,790.60	2.78	8.58
BPCL	337.90	328.80	2.77	9.62
L&T Ltd.	3,774.95	3,679.90	2.58	3.38
Indian Oil	180.39	176.55	2.18	7.25
Ultratech Cem	11,873.80	11,673.05	1.72	3.11

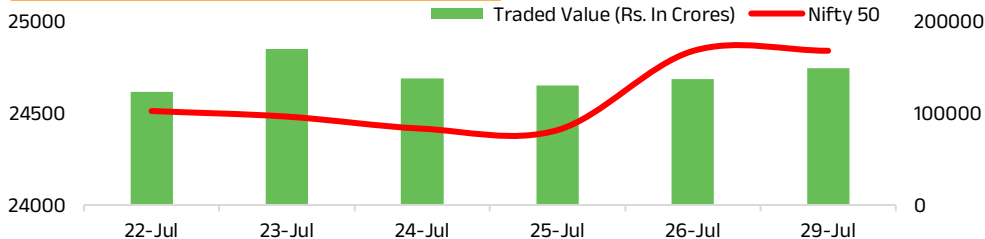
Source: NSE

## Nifty 50 Top 5 Losers

Company	29-Jul-24	Prev_Day	% Change	1 Week
Titan Industries Limited	3,411.70	3494	-2.36	4.83
Bharti Airtel	1,481.35	1514	-2.18	1.09
Cipla	1,553.95	1575	-1.34	4.29
ITC	496.05	502	-1.22	6.32
Shree Cements Limited	27,237.90	27567	-1.19	-2.44

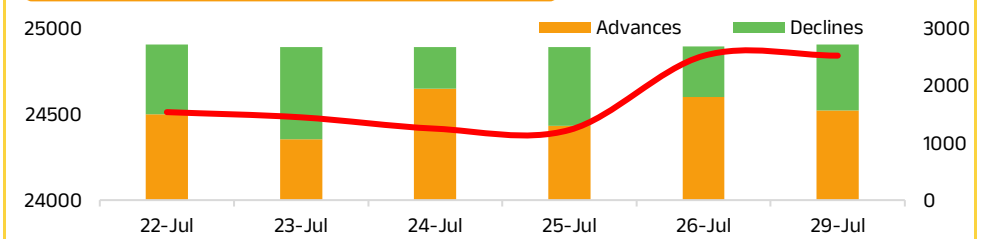
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

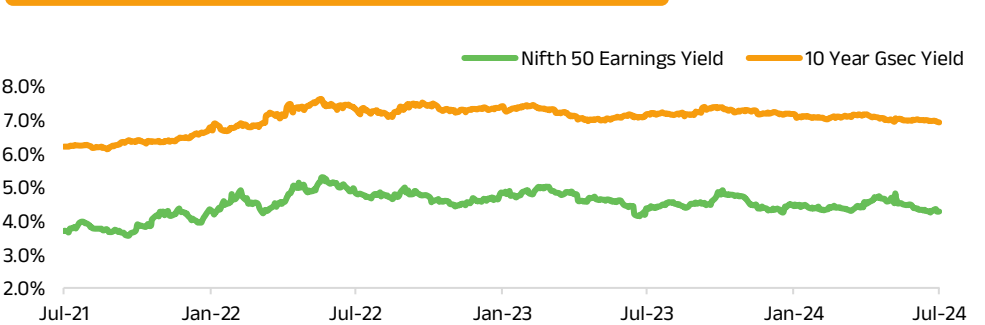
Indian equity markets closed on a flat note as signs of growing tensions in the Middle East offset hopes for more interest rate cuts from the U.S. Federal Reserve this year. The market started early trading on a positive note driven mainly by positive global cues. On the other hand, investors awaited the release of mega-cap U.S. technology company earnings and central bank policy meetings.

Adani Total Gas announced a net profit of Rs 172 crore for the first quarter ending in Jun 2024, marking a 15% increase from the Rs 150 crore reported in the same quarter last year. Revenue from operations in the reporting period rose 9% YoY to Rs 1,239 crore against Rs 1,135 crore posted in the last year period.

Bharat Electronics (BEL) announced a 46% YoY increase in its standalone net profit to Rs 776.14 crore for Q1FY25. In the same period last year, the company had recorded a net profit of Rs 530.84 crore. However, its net profit declined 56.48% in QoQ from Rs 1,783.5 crore reported in Q4FY24.

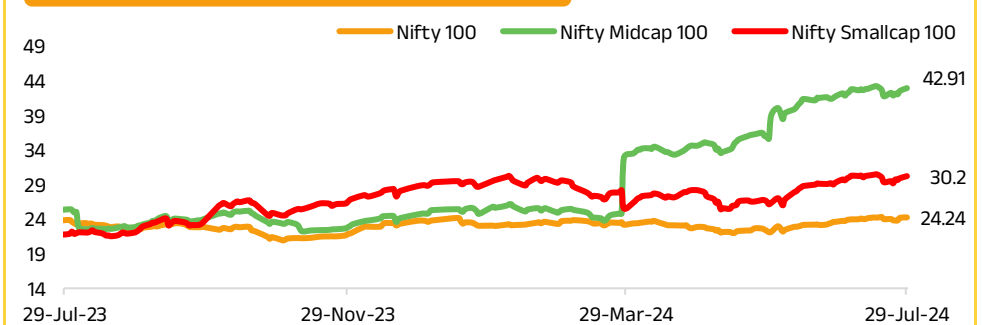
Adani Wilmar announced a consolidated net profit of Rs 313.2 crore for Q1FY25, compared to a loss of Rs 78.9 crore in the same quarter of the previous year. Its revenue jumped 9.6% YoY to Rs 14,168 crore, up from Rs 12,928 crore in the same quarter of the previous year.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



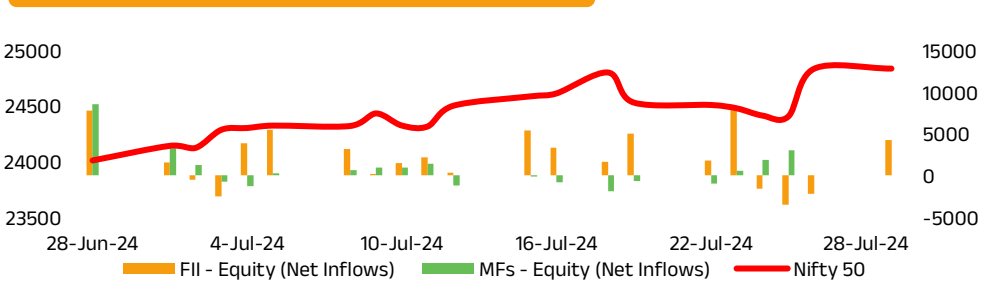
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	4269.26	37,957	37,957	41,158
MF**	3000.99	6,616	6,616	198,042
DII	5665.54	14,554	14,554	250,681

Source: SEBI, NSDL;\*\*As on 25th Jul 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	24910.50	24915.50	-0.02%
Near Basis	74.35	80.60	-7.75%
Mid Futures	25024.70	25022.70	0.01%
Mid Basis	188.60	187.80	0.43%
Near Open Interest (Cr.)	1.43	1.43	0.45%
Mid Open Interest (Cr.)	0.09	0.09	0.25%
Rollover (%)	6.80	6.63	2.52%
Put Call Ratio (OI)	1.14	1.36	-16.14%
Put Call Ratio(Vol)	1.01	0.82	22.27%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	8782	4415	34523
Index Options	1717013	1662261	400002
Stock Futures	39933	32859	318026
Stock Options	40934	41717	20229
Total	1806663	1741252	772779

Source: NSE

## Global Equity Market

Global Indices	29-Jul-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2984.22	0.07%	-1.66%	0.32%
Nasdaq 100 (U.S.)	19059.49	0.19%	-3.85%	-3.17%
FTSE (U.K.)	8292.35	0.08%	1.14%	1.57%
DAX Index (Germany)	18320.67	-0.53%	-0.47%	0.47%
CAC 40 Index (France)	7443.84	-0.98%	-2.34%	-0.48%
SSE Composite (China)	2891.85	0.03%	-2.44%	-2.55%
Nikkei (Japan)	38468.63	2.13%	-2.85%	-2.82%
Kospi (South Korea)	2765.53	1.23%	0.07%	-1.15%
HangSeng (Hong Kong)	17238.34	1.28%	-2.25%	-2.71%
Strait Times (Singapore)	3444.18	0.52%	0.20%	3.34%
Ibovespa Sao Paulo (Brazil)	126953.86	-0.42%	-0.71%	2.46%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7989.60	0.86%	0.73%	2.86%
Jakarta Composite (Indonesia)	7288.90	0.01%	-0.45%	3.19%
KLSE (Malaysia)	1624.56	0.72%	0.15%	2.17%

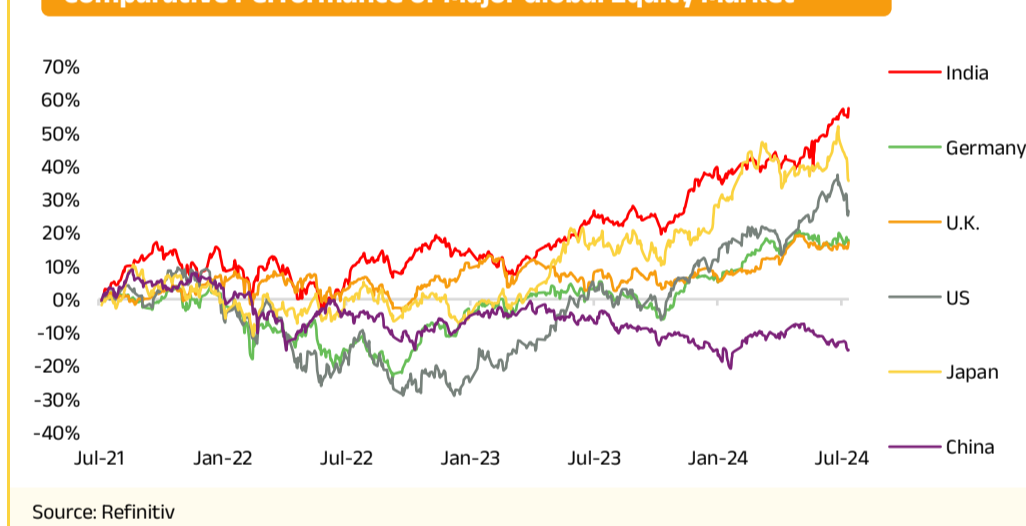
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

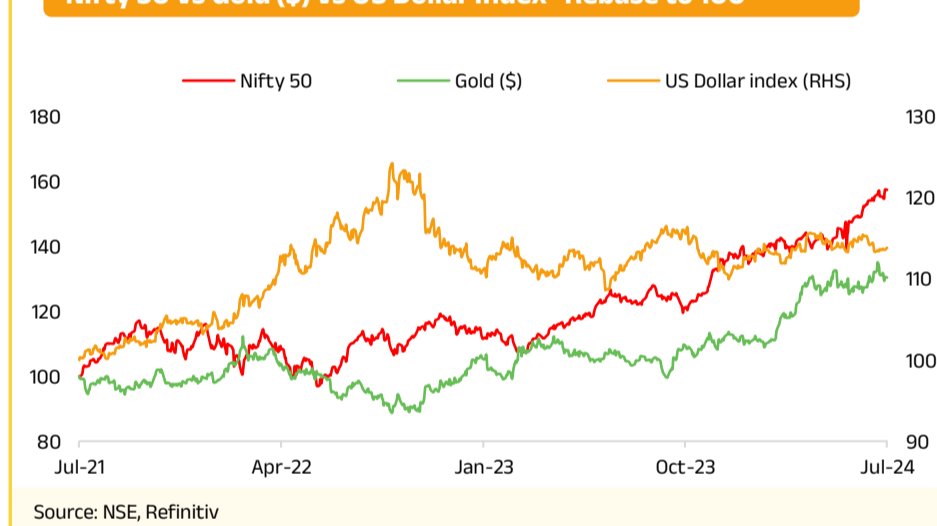
Commodity Prices	29-Jul-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	68,527	0.95%	-5.97%	-4.24%
Gold (\$/oz)	2,383.54	-0.09%	-0.59%	2.49%
Silver (INR/1 kg)	82,058	1.08%	-7.02%	-6.58%
Silver (\$/oz)	27.86	-0.11%	-4.59%	-4.35%
Brent Crude(\$/bbl)	82.18	-0.50%	-3.24%	-7.40%
Crude Oil (INR/1 bbl)	6,460.00	-1.42%	-3.61%	-5.33%
NYMEX Crude(\$/bbl)	77.12	-1.67%	-4.97%	-6.78%
Natural Gas (INR/1 mmbtu)	168.00	-1.64%	-5.62%	-25.07%
Aluminium (INR/1 kg)	213.15	-0.12%	-3.40%	-8.42%
Copper (INR/1 kg)	790.00	-2.01%	-3.86%	-5.87%
Nickel (INR/1 kg)	1,336.90	-0.01%	-2.52%	-8.70%
Lead (INR/1 kg)	196.55	-0.58%	2.91%	-0.23%
Zinc (INR/1 kg)	255.95	-0.52%	-3.38%	-6.07%
Mentha Oil (INR/1 kg)	975.50	-0.11%	1.43%	4.63%
Baltic Dry Index <sup>[1]</sup>	1,808	-1.42%	-4.64%	-11.80%

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



### Primary Instrument

Definition: It is a type of financial instrument whose price is derived from its own market value or whose price is not derived from any other instrument. It simply means that the price of the primary instrument is directly determined by the market.



### Explanation

Primary instruments include stocks, bonds, Certificate of Deposit (CD) and anything else that has its own value. In contrast to this, the price of derivative instruments, such as options, swaps and futures, is based on the value of their underlying assets like spot equity, currency, commodity and bonds. Hence, derivative products are known non-primary instruments.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.75	18.58	35.12	17.97
Mid Cap Fund	3.86	26.39	52.99	24.96
Large & Mid Cap Fund	3.54	22.75	44.20	21.76
Small Cap Fund	4.18	21.87	49.16	25.36
Multi Cap Fund	3.79	21.74	46.15	22.82
Focused Fund	3.49	20.06	37.98	19.12
Value Fund	4.41	21.38	47.55	23.62
Contra Fund	4.32	23.46	49.17	25.78
ELSS	3.41	20.20	40.25	20.96
Equity Savings	1.60	8.21	15.75	9.78
Arbitrage Fund	0.58	3.67	7.56	5.53
Dividend Yield Fund	5.26	22.04	49.12	24.61
Aggressive Hybrid Fund	3.13	16.70	31.28	16.40
Balanced Advantage	2.67	12.16	24.82	13.01

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 26 Jul, 2024

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