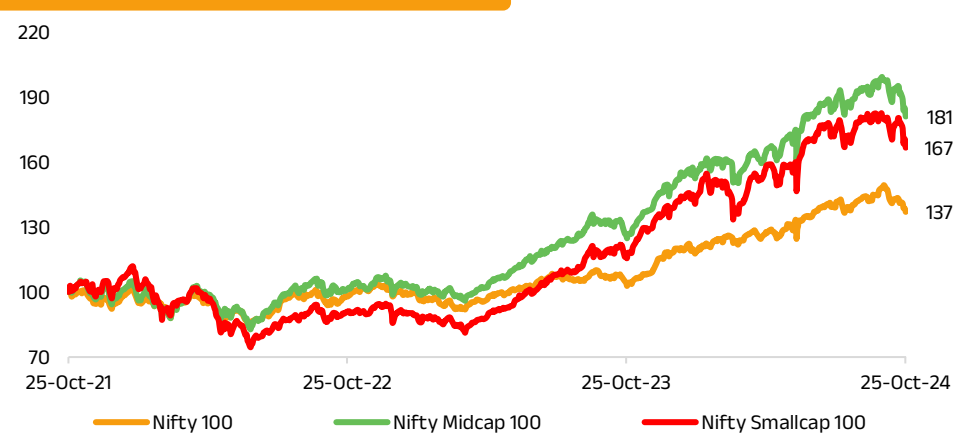


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	25-Oct-24	1 Day	1 Week	1 Month
Nifty 50	24,180.80	-0.90%	-2.71%	-7.01%
Nifty 100	25,022.20	-1.00%	-3.22%	-7.50%
Nifty 200	13,567.50	-1.15%	-3.64%	-7.68%
Nifty 500	22,499.05	-1.27%	-4.02%	-7.68%
Nifty Large Midcap 250	15,659.60	-1.38%	-4.36%	-7.76%
Nifty Midcap 150	20,563.70	-1.76%	-5.48%	-8.02%
Nifty Next 50	69,716.50	-1.57%	-6.15%	-8.89%
Nifty Smallcap 250	16,956.05	-2.28%	-7.02%	-8.44%

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

## Smart Beta Index

Index	25-Oct-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	34,278.00	-2.12%	-6.46%	-8.54%
NIFTY 500 Value 50	13,922.08	-2.70%	-6.67%	-8.11%
Nifty 200 Quality 30	21,574.70	-0.48%	-3.41%	-7.17%
Nifty 50 Equal Weight	30,488.45	-1.57%	-4.46%	-8.18%
NIFTY Alpha Low Volatility 30	28,401.95	-0.77%	-4.21%	-8.63%
Nifty High Beta 50	3,573.72	-3.26%	-8.65%	-13.16%
Nifty Low Volatility 50	24,385.71	-0.50%	-3.33%	-7.52%
Nifty Midcap150 Momentum 50	61,750.65	-2.07%	-6.80%	-8.77%
Nifty PSE	9,978.90	-2.58%	-7.46%	-10.20%
Nifty SME Emerge	15,320.36	-1.84%	-5.55%	-5.90%
Nifty 100 ESG	4,816.70	-1.33%	-3.49%	-7.32%

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

## Sector Indices

Index	25-Oct-24	1 Day	1 Week	1 Month
Nifty Auto	23,799.30	-2.16%	-5.36%	-11.49%
Nifty Bank	50,787.45	-1.44%	-2.51%	-6.13%
Nifty Consumption	11,562.60	-0.71%	-3.86%	-10.30%
Nifty Financial	23,732.70	-0.51%	-0.86%	-5.02%
Nifty FMCG	58,908.50	0.88%	-3.50%	-10.09%
Nifty Healthcare	14,302.35	0.43%	-2.70%	-2.54%
Nifty IT	42,038.85	-0.24%	-0.16%	0.19%
Nifty Media	1,894.35	-2.20%	-7.24%	-11.45%
Nifty Metal	9,048.95	-2.42%	-7.23%	-7.45%
Nifty MNC	29,144.90	-0.87%	-6.00%	-9.40%
Nifty Pharma	22,574.55	0.02%	-3.35%	-2.90%
Nifty Realty	974.35	-1.17%	-6.97%	-13.79%
Nifty Energy	39,063.75	-2.20%	-5.20%	-11.35%

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

## Nifty 50 Top 5 Gainers

Company	25-Oct-24	Prev_Day	% Change	1 Week
ITC	482.30	471.70	2.25	-0.90
Axis Bank	1,189.35	1,167.35	1.88	-0.63
Britannia Industries Limited	5,669.40	5,612.40	1.02	-3.70
HUL	2,528.05	2,505.10	0.92	-6.96
Divi's Lab	5,780.75	5,736.65	0.77	-4.01

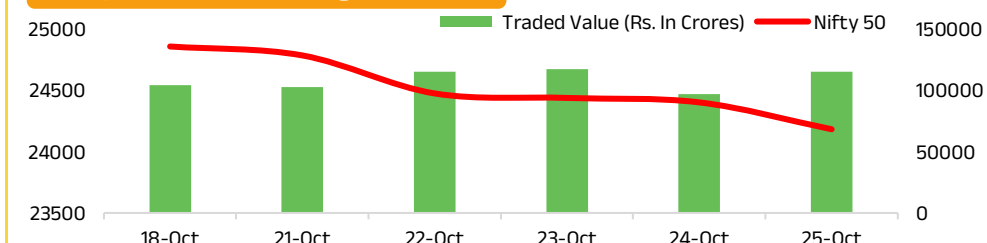
Source: NSE

## Nifty 50 Top 5 Losers

Company	25-Oct-24	Prev_Day	% Change	1 Week
IndusInd Bank	1,041.60	1280	-18.63	-22.69
BPCL	306.30	321	-4.71	-10.57
Indian Oil	146.31	153	-4.54	-11.52
M&M	2,720.85	2826	-3.73	-8.21
Coal India	461.10	477	-3.38	-6.32

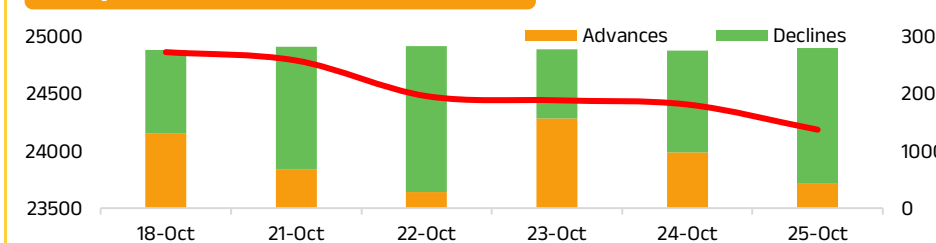
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

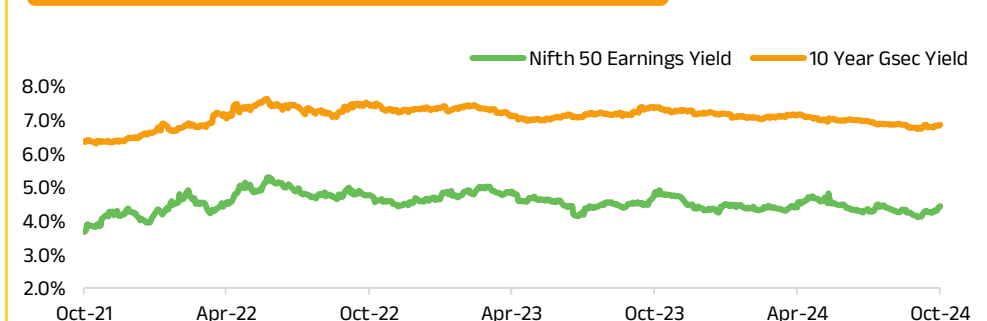
**Indian equity markets fell for the fifth straight session amid widespread sell-off in the market due to the continued outflows from foreign portfolio investors and weak quarterly earnings during the second quarter of the current fiscal, especially from the consumption sector which pointed to a slowdown in urban demand.**

**ITC Ltd announced a YoY increase of 3% in its net profit, amounting to Rs. 5,078.34 crore for the second quarter ended in Sep 2024. Additionally, the company's gross revenue from the sale of products and services rose by 16% YoY, reaching Rs. 20,359.95 crore, a growth attributed to its agriculture and hotels sectors.**

**JSW Steel Ltd announced an 84% decrease in its consolidated net profit, which amounted to Rs. 439 crore for the second quarter of FY25. This figure is a significant drop from Rs. 2,760 crore recorded in the same quarter of the previous year. Additionally, the company's revenue from operations during this period experienced an 11% YoY decline, totaling Rs. 39,684 crore.**

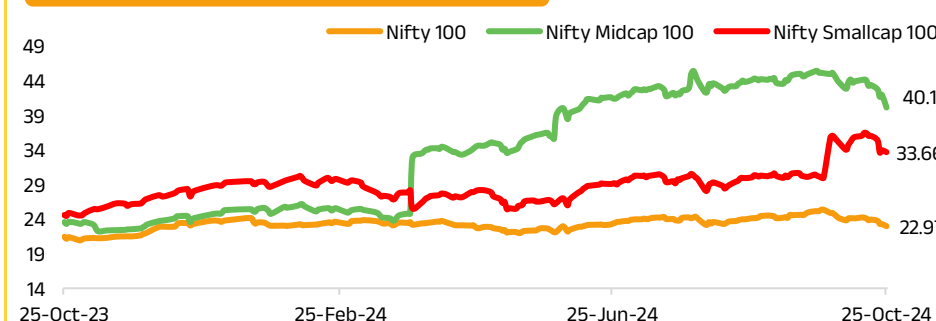
**Bharat Electronics Limited (BEL) announced on a 34% rise in its standalone net profit for the quarter that ended Sep 30, 2024. The profit reached Rs. 1,091 crore, up from Rs. 812 crore during the corresponding period of the previous year. The profit after tax (PAT) exceeded Street estimates of Rs.843 crore.**

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



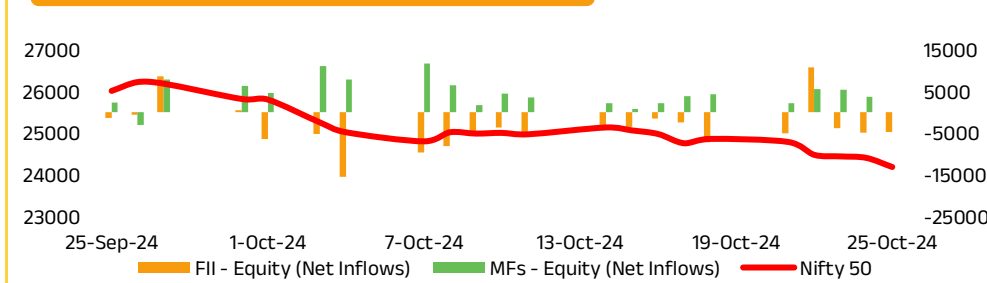
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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	-4836.55	-85,790	-85,790	14,819
MF**	3575.56	80,269	80,269	356,246
DII	4159.29	97,091	97,091	436,843

Source: SEBI, NSDL;\*\*As on 24th Oct 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	24192.80	24452.00	-1.06%
Near Basis	11.95	52.60	-77.28%
Mid Futures	24333.30	24593.90	-1.06%
Mid Basis	152.50	194.50	-21.59%
Near Open Interest (Cr.)	1.20	1.28	-6.36%
Mid Open Interest (Cr.)	0.26	0.24	7.88%
Rollover (%)	21.76	19.25	13.02%
Put Call Ratio (OI)	0.87	0.86	1.30%
Put Call Ratio(Vol)	0.96	0.95	0.65%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	6452	4779	32123
Index Options	2724581	2738814	409891
Stock Futures	34171	31422	331676
Stock Options	75773	74891	94342
Total	2840976	2849907	868032

Source: NSE

## Global Equity Market

Global Indices	25-Oct-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3171.64	-0.07%	-1.06%	1.55%
Nasdaq 100 (U.S.)	20352.01	0.59%	0.14%	1.90%
FTSE (U.K.)	8248.84	-0.25%	-1.31%	-0.24%
DAX Index (Germany)	19463.59	0.11%	-0.99%	2.88%
CAC 40 Index (France)	7497.54	-0.08%	-1.52%	-0.90%
SSE Composite (China)	3299.70	0.59%	1.17%	13.93%
Nikkei (Japan)	37913.92	-0.60%	-2.74%	0.12%
Kospi (South Korea)	2583.27	0.09%	-0.41%	-0.50%
HangSeng (Hong Kong)	20590.15	0.49%	-1.03%	7.64%
Strait Times (Singapore)	3593.41	-0.32%	-1.29%	0.28%
Ibovespa Sao Paulo (Brazil)	129893.32	-0.13%	-0.46%	-1.29%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8211.30	0.06%	-0.87%	1.04%
Jakarta Composite (Indonesia)	7694.66	-0.28%	-0.84%	-0.60%
KLSE (Malaysia)	1618.30	-0.85%	-1.68%	-3.29%

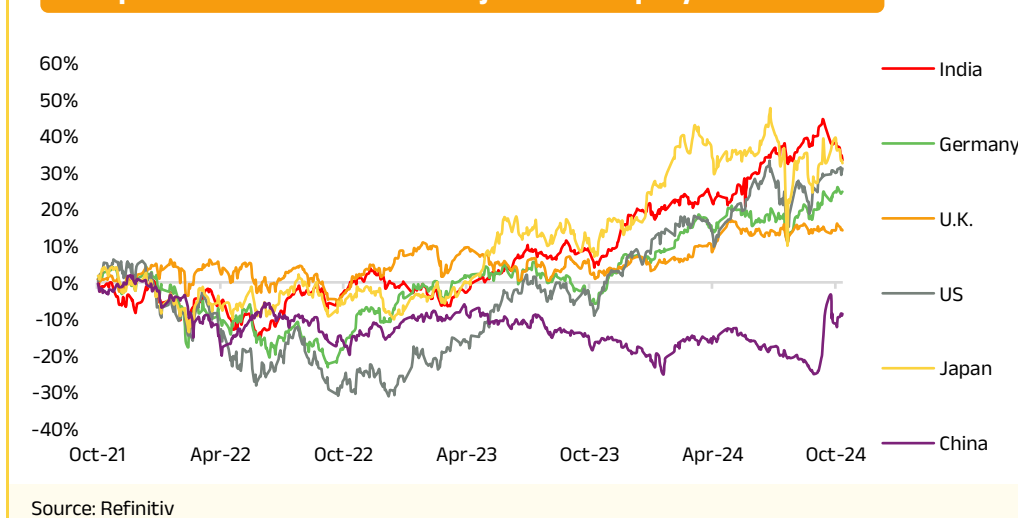
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

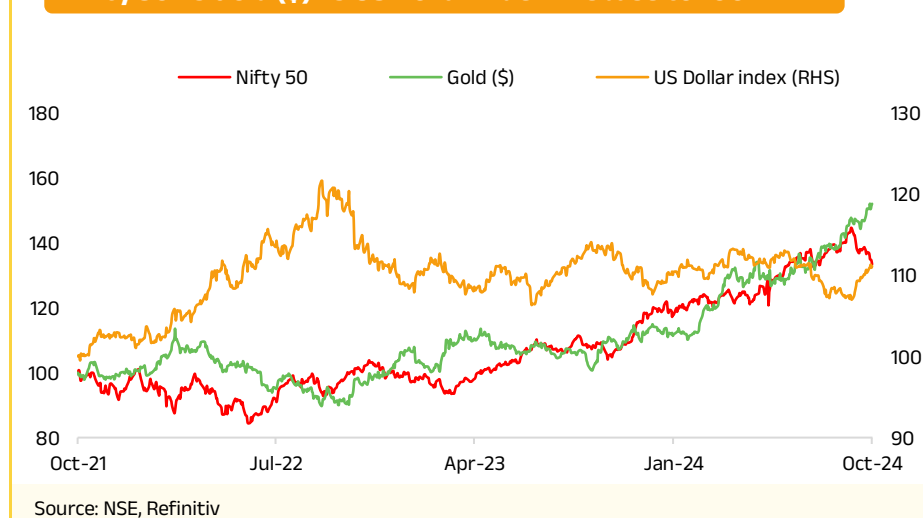
Commodity Prices	25-Oct-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	77,622	-0.48%	0.59%	3.46%
Gold (\$/oz)	2,747.69	0.44%	1.01%	3.42%
Silver (INR/1 kg)	95,128	-2.71%	3.26%	5.13%
Silver (\$/oz)	33.70	-0.01%	0.13%	5.83%
Brent Crude(\$/bbl)	76.67	1.81%	3.90%	0.01%
Crude Oil (INR/1 bbl)	5,901.00	-0.82%	-0.62%	-1.40%
NYMEX Crude(\$/bbl)	71.92	2.19%	3.21%	2.49%
Natural Gas (INR/1 mmbtu)	212.00	7.67%	7.51%	-0.61%
Aluminium (INR/1 kg)	240.70	-1.05%	1.41%	3.08%
Copper (INR/1 kg)	826.80	-0.98%	0.24%	-1.57%
Nickel (INR/1 kg)	1,372.00	-1.29%	-4.92%	-2.29%
Lead (INR/1 kg)	192.15	1.67%	2.04%	-1.96%
Zinc (INR/1 kg)	290.00	-3.77%	0.99%	4.88%
Mentha Oil (INR/1 kg)	980.20	-0.35%	0.74%	-0.14%
Baltic Dry Index	1,410	-0.49%	-10.53%	-30.06%

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



### Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



### Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-7.11	8.19	33.01	12.29
Mid Cap Fund	-6.93	14.22	45.02	20.84
Large & Mid Cap Fund	-6.86	11.52	40.46	16.87
Small Cap Fund	-7.05	12.03	40.09	22.03
Multi Cap Fund	-7.10	10.87	39.58	18.33
Focused Fund	-6.89	10.39	36.88	14.22
Value Fund	-7.06	9.66	41.46	18.53
Contra Fund	-6.26	12.36	45.76	21.07
ELSS	-6.71	10.05	36.40	16.44
Equity Savings	-1.66	5.61	15.55	8.42
Arbitrage Fund	0.57	3.58	7.31	5.88
Dividend Yield Fund	-6.79	10.69	42.03	19.57
Aggressive Hybrid Fund	-5.20	8.88	29.73	12.86
Balanced Advantage	-3.72	6.57	23.26	11.01

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.

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