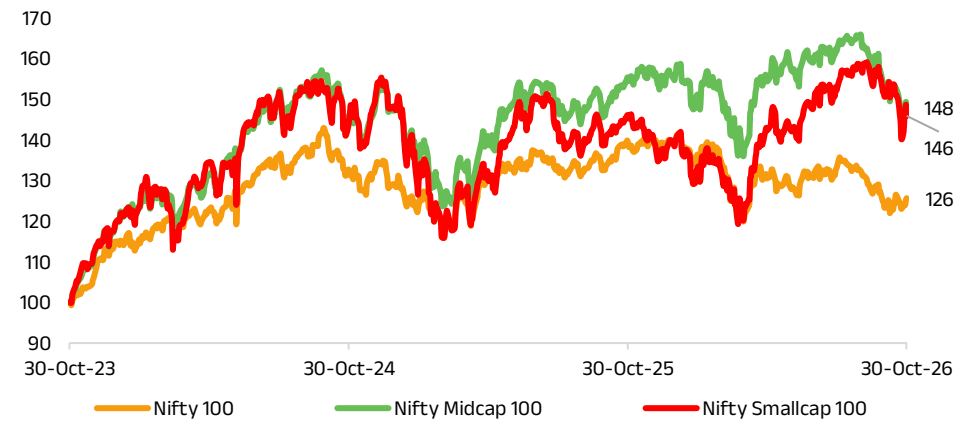
Daily Equity Market Pulse - November 02, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	30-Oct-26	1 Day	1 Week	1 Month
Nifty 50	23,053.10	0.51%	2.00%	1.91%
Nifty 100	23,971.55	0.30%	2.16%	1.00%
Nifty 200	13,183.95	0.06%	2.26%	0.11%
Nifty 500	21,895.90	-0.21%	2.19%	-0.80%
Nifty Large Midcap 250	15,541.55	-0.30%	2.18%	-1.37%
Nifty Midcap 150	21,047.50	-0.93%	2.21%	-3.75%
Nifty Next 50	67,709.10	-0.61%	2.86%	-2.92%
Nifty Smallcap 250	16,764.55	-1.97%	2.32%	-5.81%

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

Smart Beta Index

Index	30-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,565.45	-0.55%	4.63%	-3.23%
NIFTY 500 Value 50	14,651.40	-0.82%	1.39%	-3.79%
Nifty 200 Quality 30	18,937.80	0.04%	1.38%	-0.03%
Nifty 50 Equal Weight	31,194.45	0.49%	2.73%	0.94%
NIFTY Alpha Low Volatility 30	24,957.70	0.20%	2.50%	-1.04%
Nifty High Beta 50	3,945.75	-1.74%	2.05%	-5.80%
Nifty Low Volatility 50	23,279.05	0.66%	2.37%	0.82%
Nifty Midcap150 Momentum 50	59,469.45	-0.60%	4.68%	-2.15%
Nifty PSE	9,075.35	-0.24%	2.13%	-3.05%
Nifty SME Emerge	14,278.80	-0.90%	2.19%	-6.15%
Nifty 100 ESG	4,751.05	0.24%	2.22%	1.43%

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

Sector Indices

Index	30-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,422.70	-0.87%	2.25%	-3.31%
Nifty Bank	54,686.95	-0.41%	0.74%	0.10%
Nifty Consumption	11,090.70	0.29%	3.39%	0.16%
Nifty Financial	24,712.20	0.03%	1.27%	0.25%
Nifty FMCG	43,609.20	-0.62%	2.18%	-2.02%
Nifty Healthcare	16,449.55	1.58%	6.91%	1.93%
Nifty IT	32,606.90	2.32%	1.91%	17.69%
Nifty Media	1,631.25	-1.46%	4.34%	3.03%
Nifty Metal	11,784.90	-0.54%	2.67%	-7.65%
Nifty MNC	28,416.15	-0.40%	2.34%	-6.33%
Nifty Pharma	27,124.85	1.55%	7.09%	2.60%
Nifty Realty	813.90	-0.72%	3.77%	-3.95%
Nifty Energy	34,957.90	-0.97%	1.27%	-4.58%

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

Nifty 50 Top 5 Gainers

Company	30-Oct-26	Prev_Day	% Change	1 Week
Wipro	198.31	190.10	4.32	4.46
Infosys	1,185.00	1,146.50	3.36	2.70
Power Grid	265.00	260.00	1.92	7.11
NTPC	316.25	310.50	1.85	6.12
HCL Tech	1,428.10	1,403.90	1.72	0.41

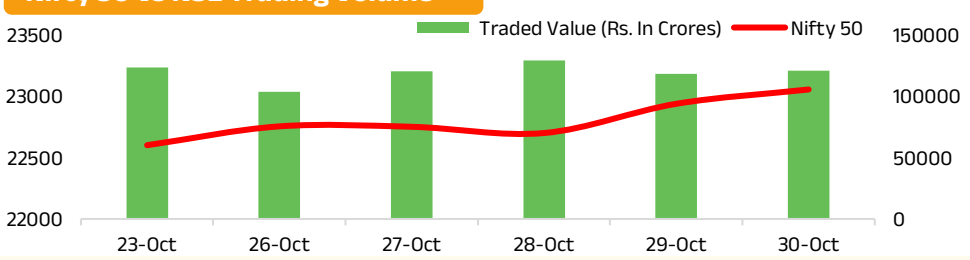
Source: NSE

Nifty 50 Top 5 Losers

Company	30-Oct-26	Prev_Day	% Change	1 Week
United Phos	513.35	542	-5.28	0.92
IndusInd Bank	838.00	868	-3.46	0.36
M&M	2,840.30	2890	-1.72	-0.73
BPCL	284.90	289	-1.49	1.05
Adani Ports & SEZ	1,850.00	1872	-1.18	8.65

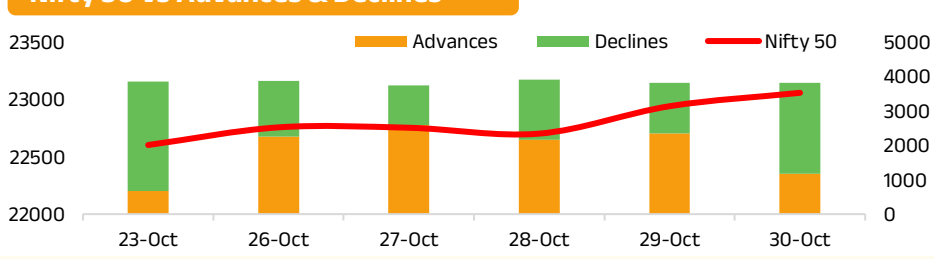
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

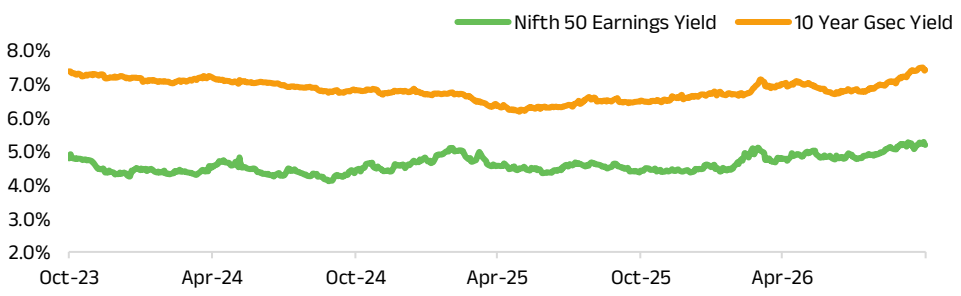
Indian equity markets advanced for the second consecutive session, led by gains in information technology stocks, as disappointing earnings from major global technology companies prompted investors to reduce exposure to artificial intelligence-focused investments globally.

Microsoft Corp.'s $25 billion bond offering received an enthusiastic response from investors. However, this does not necessarily mean that future debt issuances by other Big Tech companies will be met with the same level of demand.

The Vedanta Group has planned $25 billion in investments over the next three years to expand capacity across its existing businesses through organic growth and brownfield expansion projects.

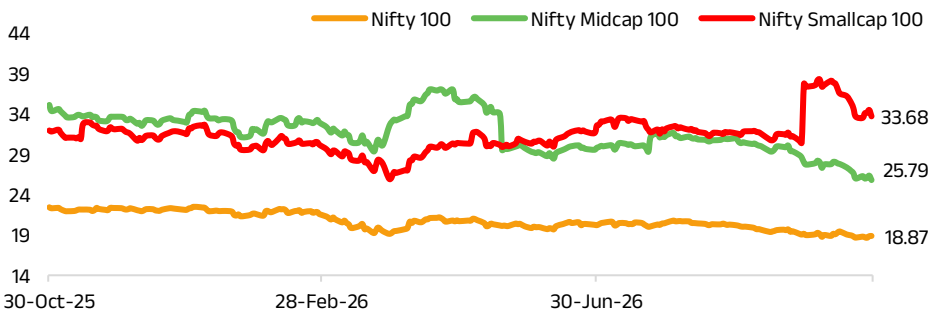
Indian Hotels Company Limited (IHCL) and Adani Airport Holdings Limited (AAHL) announced on Oct 29, 2026, a multi-hotel operating agreement covering eight airport-linked hotels with more than 2,000 rooms across key locations, including Mumbai, Ahmedabad, Lucknow, and Guwahati.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



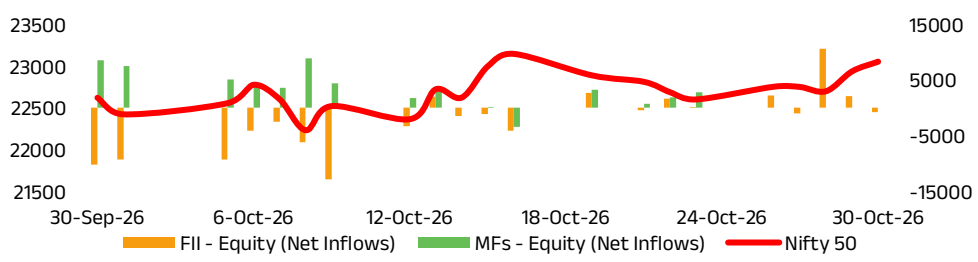
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FIIs & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

INR Cr.

Description	Net	MTD	QTD	YTD
FII	-802.91	-34,843	-34,843	-295,146
MF**	2802.33	43,787	43,787	454,775
DII	-817.51	62,220	62,220	695,509

Source: SEBI, NSDL;**As on 23rd Oct 2026;

Daily Equity Market Pulse - November 02, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	23098.90	23047.40	0.22%
Near Basis	45.80	110.65	-58.61%
Mid Futures	23235.80	23200.40	0.15%
Mid Basis	182.70	263.65	-30.70%
Near Open Interest (Cr.)	1.56	1.58	-1.36%
Mid Open Interest (Cr.)	0.12	0.12	-0.44%
Rollover (%)	7.80	7.61	2.49%
Put Call Ratio (OI)	1.42	1.31	8.54%
Put Call Ratio(Vol)	0.99	0.94	5.23%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1663	2092	47556
Index Options	3912710	3897503	497238
Stock Futures	18338	16226	391010
Stock Options	20250	20168	39309
Total	3952961	3935989	975113

Source: NSE

Global Equity Market

Global Indices	30-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4124.50	-1.80%	-0.54%	-0.75%
Nasdaq 100 (U.S.)	28384.85	-3.46%	-1.98%	-6.65%
FTSE (U.K.)	10729.78	0.07%	0.37%	1.17%
DAX Index (Germany)	25818.21	-0.85%	2.53%	2.46%
CAC 40 Index (France)	7969.42	-0.01%	2.40%	0.06%
SSE Composite (China)	3599.02	-1.44%	-2.48%	-6.33%
Nikkei (Japan)	63290.11	-2.12%	0.95%	-5.19%
Kospi (South Korea)	5730.74	-3.48%	3.25%	-16.19%
HangSeng (Hong Kong)	23294.42	1.46%	0.87%	-5.36%
Strait Times (Singapore)	5376.74	-0.36%	-0.84%	-5.27%
Ibovespa Sao Paulo (Brazil)	167921.80	-0.75%	-18.12%	-9.88%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8908.10	0.18%	1.28%	1.35%
Jakarta Composite (Indonesia)	5057.05	-0.80%	-7.03%	-16.70%
KLSE (Malaysia)	1615.60	0.28%	0.25%	-2.15%

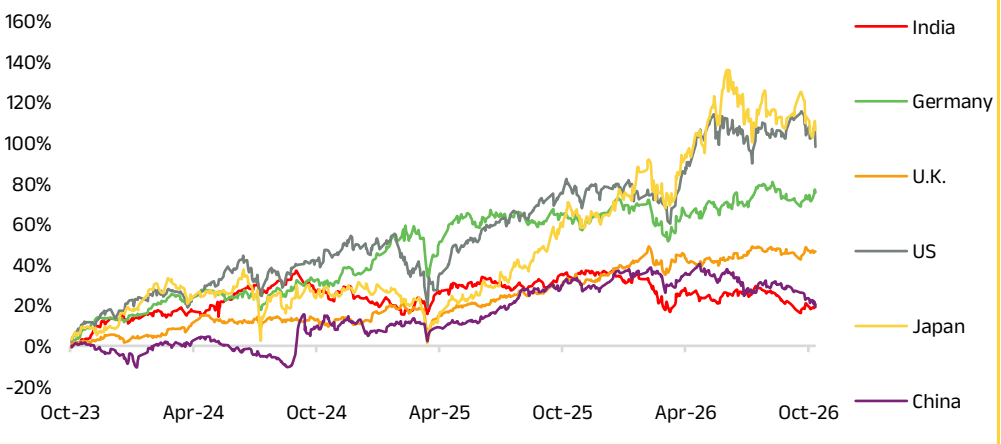
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	30-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	139,830	-1.27%	-0.85%	-5.27%
Gold ($/oz)	3,875.02	-3.62%	-3.02%	-6.76%
Silver (INR/1 kg)	182,442	-4.18%	-6.04%	-17.49%
Silver ($/oz)	49.10	-6.27%	-8.89%	-18.71%
Brent Crude($/bbl)	120.76	-12.48%	-18.72%	-8.49%
Crude Oil (INR/1 bbl)	9,728.00	-0.61%	3.27%	13.34%
NYMEX Crude($/bbl)	107.46	3.93%	2.67%	17.55%
Natural Gas (INR/1 mmbtu)	281.50	-2.49%	6.31%	-2.66%
Aluminium (INR/1 kg)	332.15	-0.05%	1.79%	-4.06%
Copper (INR/1 kg)	1,395.50	-1.17%	0.58%	-1.73%
Nickel (INR/1 kg)	1,515.70	-0.86%	-1.78%	-4.52%
Lead (INR/1 kg)	199.50	0.73%	1.48%	1.58%
Zinc (INR/1 kg)	427.00	-1.61%	-2.06%	-1.67%
Mentha Oil (INR/1 kg)	1,426.10	-0.12%	2.55%	3.69%
Baltic Dry Index	2,714	0.07%	2.03%	-12.82%

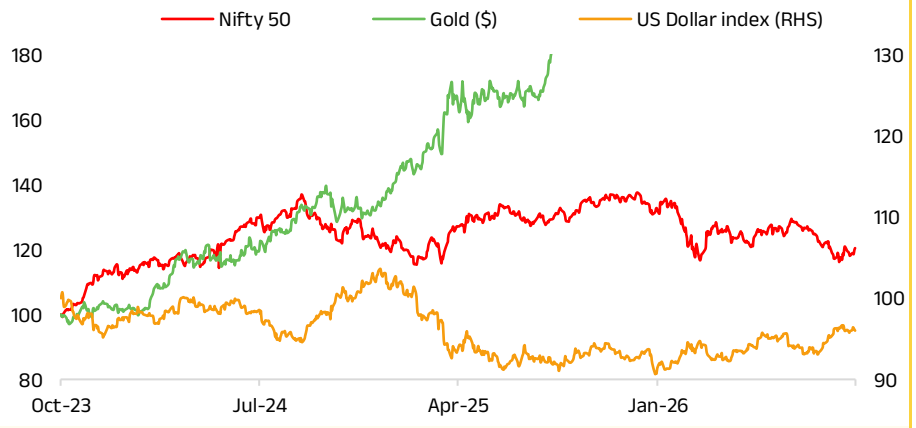
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Comparative Performance of Major Global Equity Market



Source: Refinitiv

Nifty 50 vs Gold ($) vs US Dollar Index- Rebase to 100



Source: NSE, Refinitiv

Term of the Day

Risk Management

Definition: Risk management is a process by means of which risks are identified, assessed, monitored and finally mitigated for any process or organisation. It is a process which is considered very critical for proper functioning and maintenance of any organisation. Some of the risks which a company is generally exposed to are financial risk, environmental risk, theft risk besides others.

Explanation

Risk Management is a critical part of organization's strategy and it is widely seen as an essential part of the business. Companies face various risks and it is strategically very important to make provisions for them and mitigate them wherever possible. Effective risk management practices of the organization makes it less vulnerable and better prepared for uncertainty. Some of the common methods of mitigating risks are transferring it to a third party (insurance), budgeting for the same, implementing stringent control measures and finally creating a backup plan. Let us take an example of a company X based in India.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	0.53	-1.56	-7.35	9.17
Flexi Cap Fund	-1.78	0.25	-4.81	10.64
Mid Cap Fund	-3.45	-0.69	-2.91	13.97
Large & Mid Cap Fund	-1.86	-0.97	-5.09	12.03
Small Cap Fund	-5.95	4.39	1.79	12.58
Multi Cap Fund	-2.75	1.34	-2.40	12.42
Focused Fund	-1.12	0.76	-4.21	10.93
Value Fund	-2.38	-3.52	-6.10	10.91
Contra Fund	-1.22	-2.58	-8.50	11.53
ELSS	-2.41	-2.06	-6.74	9.87
Equity Savings	-0.11	1.11	1.01	7.40
Arbitrage Fund	0.51	2.86	5.90	6.46
Dividend Yield Fund	-1.67	-3.66	-6.52	10.89
Aggressive Hybrid Fund	-0.98	-0.91	-4.51	9.41
Balanced Advantage	-0.65	-0.53	-3.26	7.77

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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