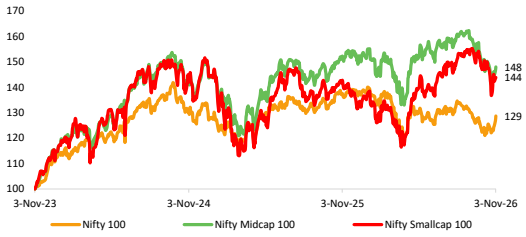
Daily Equity Market Pulse - November 04, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	3-Nov-26	1 Day	1 Week	1 Month
Nifty 50	23,810.85	1.58%	4.66%	6.19%
Nifty 100	24,739.50	1.47%	4.43%	5.20%
Nifty 200	13,582.10	1.39%	4.10%	4.11%
Nifty 500	22,520.35	1.25%	3.61%	3.03%
Nifty Large Midcap 250	15,968.05	1.24%	3.47%	2.33%
Nifty Midcap 150	21,523.35	1.00%	2.48%	-0.56%
Nifty Next 50	69,624.35	0.96%	3.39%	0.93%
Nifty Smallcap 250	17,061.65	0.42%	0.76%	-3.00%

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

Smart Beta Index

Index	3-Nov-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Inde	29,350.40	0.64%	3.55%	0.46%
NIFTY 500 Value 50	14,963.45	-0.05%	2.38%	-0.14%
Nifty 200 Quality 30	19,541.05	1.93%	3.81%	3.92%
Nifty 50 Equal Weight	32,058.20	1.30%	4.39%	5.00%
NIFTY Alpha Low Volatility 3(	25,757.00	1.88%	4.36%	3.30%
Nifty High Beta 50	4,073.85	1.31%	3.76%	-1.03%
Nifty Low Volatility 50	23,930.75	1.64%	4.41%	4.59%
Nifty Midcap150 Momentum !	60,569.50	0.79%	3.06%	0.46%
Nifty PSE	9,299.95	0.13%	2.78%	0.99%
Nifty SME Emerge	14,385.95	0.83%	0.65%	-4.05%
Nifty 100 ESG	4,877.10	1.44%	3.86%	4.98%

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

Sector Indices

Index	3-Nov-26	1 Day	1 Week	1 Month
Nifty Auto	26,201.95	1.71%	3.40%	3.22%
Nifty Bank	55,540.05	0.98%	2.90%	2.00%
Nifty Consumption	11,458.95	2.29%	4.78%	5.49%
Nifty Financial	25,357.90	1.84%	4.34%	3.27%
Nifty FMCG	45,580.00	3.65%	5.71%	4.09%
Nifty Healthcare	16,580.40	0.61%	4.16%	3.01%
Nifty IT	32,551.60	0.34%	1.13%	15.00%
Nifty Media	1,626.85	0.49%	0.73%	5.21%
Nifty Metal	12,146.15	-0.14%	2.88%	-2.52%
Nifty MNC	29,491.10	1.88%	4.26%	-1.61%
Nifty Pharma	27,218.50	0.42%	3.62%	3.45%
Nifty Realty	841.40	2.33%	4.52%	0.77%
Nifty Energy	36,290.70	-0.11%	2.92%	-0.27%

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

Nifty 50 Top 5 Gainers

Company	3-Nov-26	Prev_Day	% Change	1 Week
Britannia Industries Limited	4,930.00	4,635.00	6.36	8.11
Tata Beverages	1,073.00	1,028.90	4.29	7.30
Asian Paints	2,437.80	2,344.30	3.99	7.06
Bharti Airtel	2,065.00	1,989.90	3.77	4.36
HDFC Bank	725.50	700.00	3.64	6.66

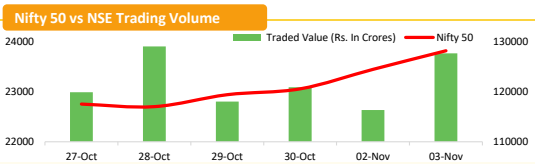
Source: NSE

Nifty 50 Top 5 Losers

Company	3-Nov-26	Prev_Day	% Change	1 Week
Power Grid	259.55	268	-3.04	3.10
SBI	970.25	987	-1.70	2.66
ONGC	232.17	235	-1.13	1.01
Infosys	1,148.10	1161	-1.11	-1.28
NTPC	321.55	323	-0.45	6.54

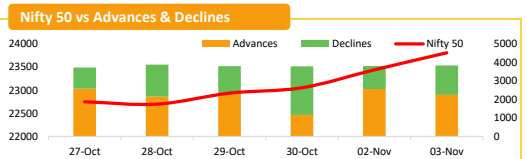
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

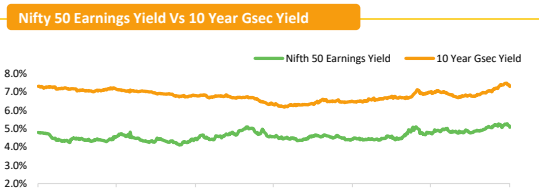
Indian equity markets extended their gains for a fourth consecutive session, supported by improving investor sentiment amid diplomatic efforts involving the U.S., Iran, and Qatar that raised hopes of de-escalation and alleviated concerns over potential disruptions to global energy supplies. Sentiment was further aided by the return of foreign institutional investors as net buyers in the previous session.

State Bank of India reported standalone net profit of Rs. 23,038 crore for the quarter ended Sep 2025, up 14% YoY. Net interest income increased 15% YoY, supported by healthy credit growth and core banking performance. The results reflected continued strength in the bank's operating metrics and lending franchise.

ITC reported a 20% YoY decline in net profit for the quarter ended Sep 2025 as higher taxes weighed on margins. Despite pressure on profitability, the company continued to see support from its diversified business portfolio. Management highlighted the impact of taxation and cost factors on quarterly earnings.

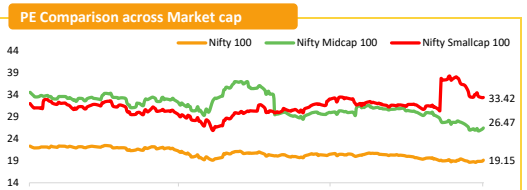
Marico posted a 31% YoY jump in profit for the quarter ended Sep 2025, driven by resilient demand and operational performance. The company, however, cautioned that rising input costs and geopolitical challenges in West Asia could affect margins going forward. It continues to monitor commodity trends closely.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



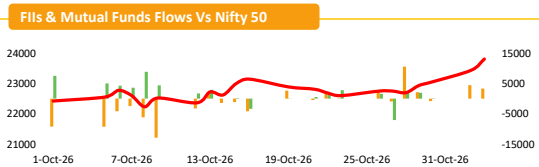
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	3352.12	7,810	-27,033	-287,336
MF**	-77.86		39,251	450,239
DII	-3678.85	-4,071	58,149	691,438

Source: SEBI, NSDL;**As on 30th Oct 2026;

Daily Equity Market Pulse - November 04, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	23780.50	23407.40	1.59%
Near Basis	-30.35	-33.40	-9.13%
Mid Futures	23906.80	23534.60	1.58%
Mid Basis	95.95	93.80	2.29%
Near Open Interest (Cr.)	1.38	1.51	-8.61%
Mid Open Interest (Cr.)	0.13	0.13	2.46%
Rollover (%)	9.77	8.48	15.29%
Put Call Ratio (OI)	1.50	1.40	7.53%
Put Call Ratio(Vol)	1.04	1.01	3.19%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3156	2042	45918
Index Options	1953578	1943012	597594
Stock Futures	22065	18294	394345
Stock Options	29917	29518	55691
Total	2008716	1992866	1093549

Source: NSE

Global Equity Market

Global Indices	3-Nov-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4121.34	0.37%	-1.84%	-1.82%
Nasdaq 100 (U.S.)	28180.26	0.68%	-4.96%	-8.53%
FTSE (U.K.)	10638.43	-1.14%	-0.45%	1.69%
DAX Index (Germany)	25864.62	-0.45%	1.07%	2.51%
CAC 40 Index (France)	8020.31	-0.34%	1.69%	1.56%
SSE Composite (China)	3608.10	-0.82%	-1.10%	-6.09%
Nikkei (Japan)[1]	63081.86	-0.33%	-0.29%	-7.65%
Kospi (South Korea)	5648.79	-3.59%	0.19%	-19.35%
HangSeng (Hong Kong)	23525.97	0.57%	2.10%	-1.86%
Strait Times (Singapore)	5269.29	-0.65%	-2.37%	-6.49%
Ibovespa Sao Paulo (Brazil)	165528.92	-1.42%	-5.79%	-13.84%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8886.80	0.34%	0.41%	2.36%
Jakarta Composite (Indonesia)	4904.29	-3.78%	-6.87%	-18.76%
KLSE (Malaysia)	1621.85	0.14%	0.62%	-0.55%

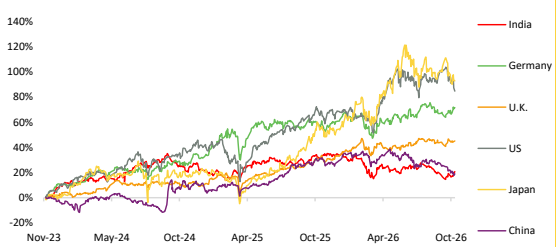
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	3-Nov-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	137,034	0.09%	-2.69%	-7.27%
Gold ($/oz)	3,928.25	-0.49%	-3.19%	-5.17%
Silver (INR/1 kg)	176,148	-2.27%	-8.35%	-20.45%
Silver ($/oz)	49.77	-1.69%	-8.44%	-17.58%
Brent Crude($/bbl)	110.01	0.68%	-24.80%	-21.37%
Crude Oil (INR/1 bbl)	9,152.00	-7.71%	-5.48%	5.45%
NYMEX Crude($/bbl)	99.54	-0.42%	-1.74%	8.07%
Natural Gas (INR/1 mmb	271.00	-1.81%	9.45%	-6.68%
Aluminium (INR/1 kg)	331.70	-0.24%	0.44%	-2.78%
Copper (INR/1 kg)	1,392.50	-0.48%	-0.77%	-1.49%
Nickel (INR/1 kg)	1,496.50	-0.75%	-2.30%	-5.15%
Lead (INR/1 kg)	197.75	-0.25%	-0.45%	0.53%
Zinc (INR/1 kg)	427.70	-0.96%	-2.64%	0.79%
Mentha Oil (INR/1 kg)	1,425.10	0.50%	1.52%	2.86%
Baltic Dry Index	2,590	-2.19%	-0.50%	-17.73%

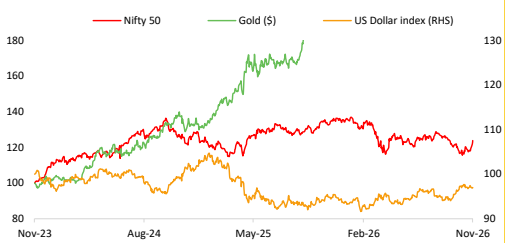
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose

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	4.08	1.09	-4.67	9.79
Flexi Cap Fund	1.42	2.59	-2.50	11.09
Mid Cap Fund	-0.50	1.40	-0.98	14.14
Large & Mid Cap Fun	1.37	1.30	-2.96	12.40
Small Cap Fund	-3.34	6.15	3.04	12.49
Multi Cap Fund	0.31	3.51	-0.41	12.77
Focused Fund	2.18	3.21	-1.77	11.40
Value Fund	0.82	-1.22	-3.92	11.27
Contra Fund	1.83	-0.57	-6.44	11.75
ELSS	0.80	0.20	-4.46	10.22
Equity Savings	1.16	2.07	1.99	7.62
Arbitrage Fund	0.68	3.05	6.05	6.50
Dividend Yield Fund	1.11	-1.72	-4.72	11.13
Aggressive Hybrid Fu	1.70	1.12	-2.45	9.86
Balanced Advantage	1.75	1.26	-1.50	8.21

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.

[1]Data as on 02 Nov,

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