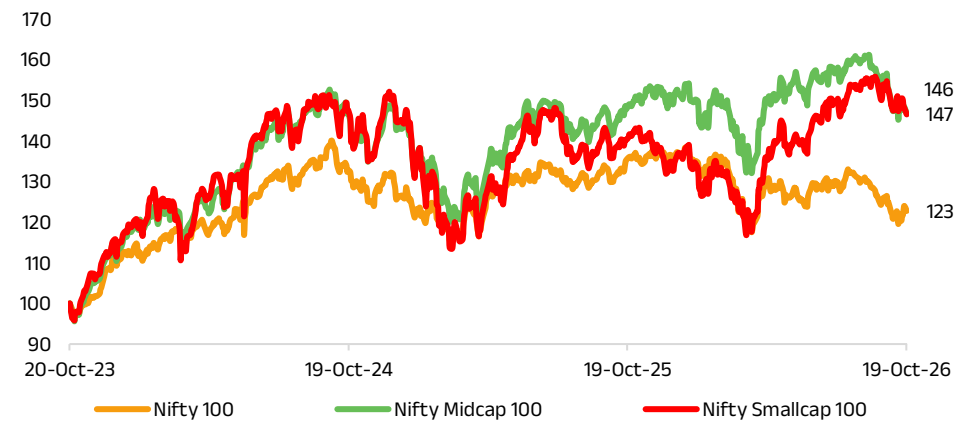
Daily Equity Market Pulse - October 21, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	19-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,888.95	-1.11%	0.73%	-1.96%
Nifty 100	23,895.45	-0.98%	0.53%	-2.46%
Nifty 200	13,203.35	-1.01%	0.10%	-3.18%
Nifty 500	22,041.60	-1.03%	-0.22%	-3.50%
Nifty Large Midcap 250	15,678.75	-1.04%	-0.49%	-4.31%
Nifty Midcap 150	21,499.30	-1.09%	-1.51%	-6.12%
Nifty Next 50	68,695.85	-0.42%	-0.34%	-4.62%
Nifty Smallcap 250	17,435.15	-1.15%	-2.23%	-4.66%

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

Smart Beta Index

Index	19-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,924.95	-0.57%	-1.64%	-4.93%
NIFTY 500 Value 50	14,924.05	-0.30%	-0.30%	-4.99%
Nifty 200 Quality 30	19,244.10	-1.16%	-0.13%	-1.62%
Nifty 50 Equal Weight	30,908.40	-0.93%	0.10%	-3.24%
NIFTY Alpha Low Volatility 30	24,753.65	-0.64%	-0.24%	-5.20%
Nifty High Beta 50	4,101.85	-0.88%	-1.99%	-5.89%
Nifty Low Volatility 50	23,054.45	-0.89%	0.15%	-3.07%
Nifty Midcap150 Momentum 50	59,774.70	-0.81%	-1.86%	-5.67%
Nifty PSE	9,190.60	-0.61%	-0.07%	-4.23%
Nifty SME Emerge	14,870.80	-1.71%	-1.18%	-0.63%
Nifty 100 ESG	4,737.10	-1.09%	0.69%	-2.65%

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

Sector Indices

Index	19-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,591.25	-0.69%	0.79%	-5.67%
Nifty Bank	55,488.10	-0.64%	0.01%	-1.54%
Nifty Consumption	10,938.60	-1.05%	-0.09%	-4.56%
Nifty Financial	24,987.10	-1.58%	-0.96%	-2.05%
Nifty FMCG	43,975.50	-1.44%	-1.69%	-3.28%
Nifty Healthcare	15,557.60	-0.80%	-1.91%	-6.36%
Nifty IT	31,516.30	-1.28%	5.65%	9.22%
Nifty Media	1,643.90	-0.26%	0.75%	5.80%
Nifty Metal	12,066.40	-0.55%	-0.18%	-7.56%
Nifty MNC	29,239.80	-0.93%	-1.98%	-7.72%
Nifty Pharma	25,615.00	-0.65%	-1.76%	-4.10%
Nifty Realty	816.05	-1.20%	-1.67%	-3.33%
Nifty Energy	35,974.45	-0.60%	0.00%	-4.76%

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

Nifty 50 Top 5 Gainers

Company	19-Oct-26	Prev_Day	% Change	1 Week
JSW Steel	1,241.30	1,216.30	2.06	5.50
ONGC	225.00	222.00	1.35	1.06
SBI	973.70	962.60	1.15	1.75
L&T Ltd.	3,661.90	3,627.10	0.96	-0.36
Eicher Motors Limited	7,349.00	7,284.50	0.89	2.60

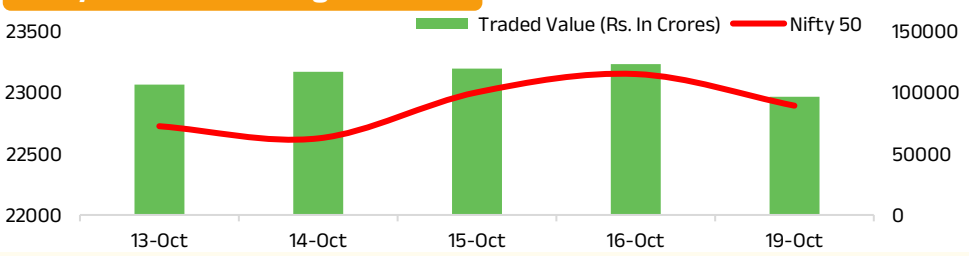
Source: NSE

Nifty 50 Top 5 Losers

Company	19-Oct-26	Prev_Day	% Change	1 Week
Axis Bank	1,236.00	1290	-4.19	-2.55
Tata Motors	278.00	287	-3.09	-2.75
Infosys	1,130.70	1161	-2.63	6.46
Ultratech Cem	10,650.00	10907	-2.36	-0.93
HDFC Bank	712.00	729	-2.31	-0.28

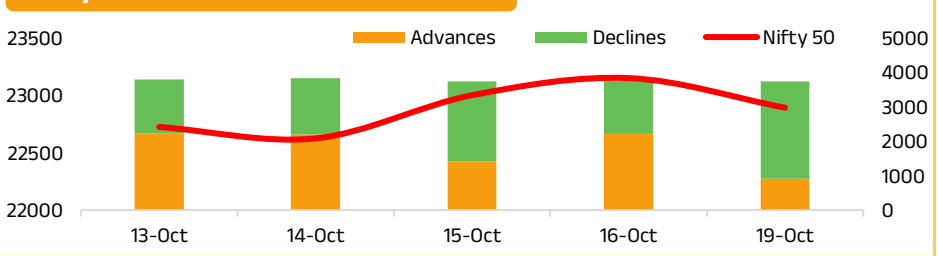
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

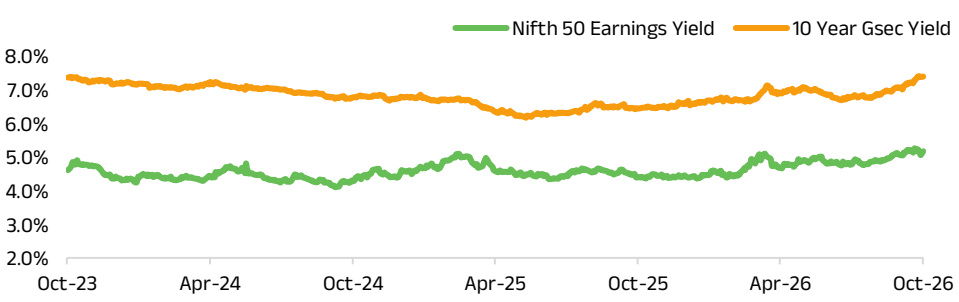
Indian equity markets fell as selling intensified in major private bank stocks following Q2 earnings results. The decline was also driven by strong foreign investor selling, elevated crude oil prices amid Strait of Hormuz tensions, and cautious market sentiment. Higher oil prices raised concerns about India's inflation, current account deficit, and economic outlook.

L&T Technology Services reported a consolidated net profit of Rs. 548 crore for the quarter ended Sep 2026. The company also announced an interim dividend, reflecting continued cash generation and balance-sheet strength. Management highlighted steady execution across engineering and technology services while maintaining focus on long-term growth initiatives.

CareEdge Global IFSC announced plans to sell a 19.8% stake to SBI and NSE IX. The transaction is aimed at strengthening the company's strategic positioning within the international financial services ecosystem. The proposed investment is expected to support growth opportunities and broaden institutional participation in the platform.

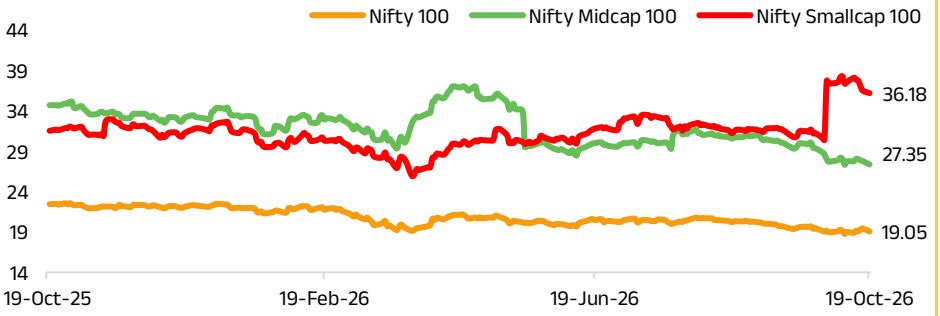
HDFC Bank has completed selling a majority of its stake in HDFC Credila, an education finance subsidiary, for Rs 9,553 crore to private equity firms BPEA EQT and ChrysCapital. The bank would no longer have HDFC Credila as a division.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



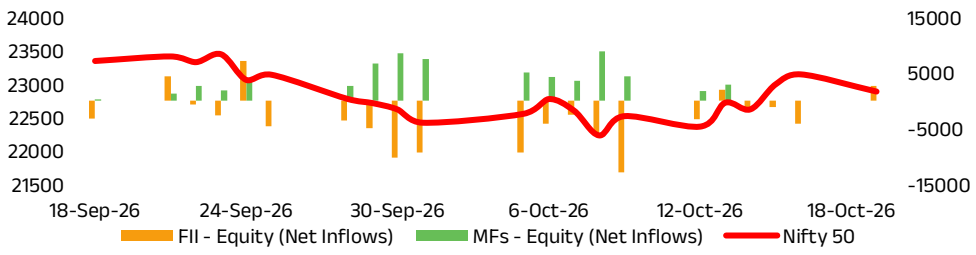
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	2643.24	-49,457	-49,457	-309,760
MF**	2944.93	38,489	38,489	455,397
DII*	3201.19	51,369	51,369	684,658

Source: SEBI, NSDL;*As on 19th Oct 2026;**As on 13th Oct 2026;

Daily Equity Market Pulse - October 21, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	22895.20	22895.20	0.00%
Near Basis	6.25	6.25	0.00%
Mid Futures	23008.80	23008.80	0.00%
Mid Basis	119.85	119.85	0.00%
Near Open Interest (Cr.)	1.64	1.64	0.00%
Mid Open Interest (Cr.)	0.31	0.31	0.00%
Rollover (%)	18.46	18.46	0.00%
Put Call Ratio (OI)	0.86	1.21	-28.83%
Put Call Ratio(Vol)	1.04	0.90	15.58%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2602	1581	55029
Index Options	1798503	1805506	617565
Stock Futures	23323	24011	417987
Stock Options	34059	34170	96362
Total	1858488	1865267	1186944

Source: NSE

Global Equity Market

Global Indices	20-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)[2]	4162.18	-1.12%	-1.86%	0.04%
Nasdaq 100 (U.S.)	29490.28	-0.13%	-3.53%	-0.52%
FTSE (U.K.)[2]	10881.90	0.38%	2.17%	2.09%
DAX Index (Germany)[2]	25622.61	0.95%	1.44%	1.26%
CAC 40 Index (France)[2]	7956.70	0.28%	1.65%	-1.34%
SSE Composite (China)	3735.37	0.12%	-1.72%	-4.51%
Nikkei (Japan)	64075.42	-1.30%	-5.46%	-1.45%
Kospi (South Korea)	5552.74	-3.73%	-8.00%	-19.46%
HangSeng (Hong Kong)	23867.74	-1.32%	-1.96%	-3.57%
Strait Times (Singapore)	5404.02	-0.15%	-0.49%	-4.46%
Ibovespa Sao Paulo (Brazil)	208295.98	1.57%	0.68%	12.45%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8816.90	-0.33%	0.38%	0.98%
Jakarta Composite (Indonesia)	5278.89	5.65%	-10.92%	-18.04%
KLSE (Malaysia)	1599.58	0.24%	-1.46%	-3.96%

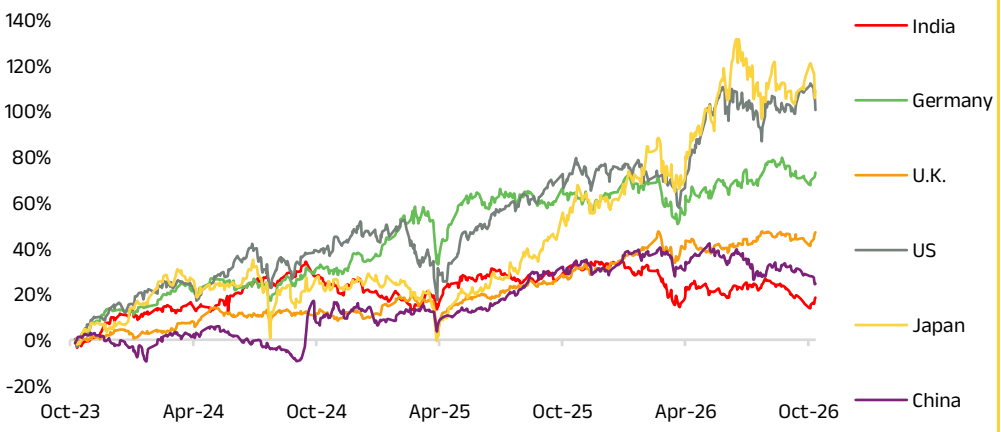
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	20-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)[1]	145,353	-0.37%	-1.21%	-5.11%
Gold ($/oz)	4,124.34	-0.37%	-0.78%	-5.77%
Silver (INR/1 kg)[1]	208,380	-1.08%	-5.00%	-12.10%
Silver ($/oz)	57.98	1.57%	-2.46%	-12.46%
Brent Crude($/bbl)	137.88	0.17%	-7.75%	0.20%
Crude Oil (INR/1 bbl)[1]	9,636.00	3.46%	7.36%	-1.39%
NYMEX Crude($/bbl)	107.79	1.30%	13.30%	6.36%
Natural Gas (INR/1 mmbtu)	296.10	-3.74%	-2.34%	6.43%
Aluminium (INR/1 kg)[1]	324.85	-0.96%	-1.52%	-8.49%
Copper (INR/1 kg)[1]	1,418.50	-0.25%	-2.03%	-1.88%
Nickel (INR/1 kg)[1]	1,504.60	0.17%	-1.77%	-5.72%
Lead (INR/1 kg)[1]	198.50	-0.65%	0.00%	0.92%
Zinc (INR/1 kg)[1]	436.75	-0.29%	0.63%	-0.95%
Mentha Oil (INR/1 kg)[1]	1,393.10	0.92%	-0.41%	3.52%
Baltic Dry Index	2,593	1.85%	-7.43%	-23.06%

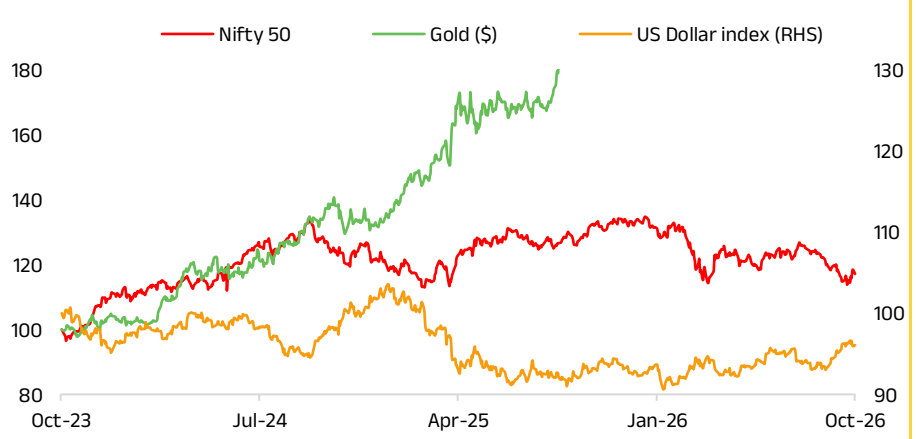
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-2.72	-3.49	-7.54	8.36
Flexi Cap Fund	-3.55	0.25	-3.80	10.15
Mid Cap Fund	-5.85	0.70	-0.52	13.75
Large & Mid Cap Fund	-4.67	-1.12	-3.91	11.57
Small Cap Fund	-4.73	9.84	6.75	13.03
Multi Cap Fund	-4.32	2.61	-0.66	12.03
Focused Fund	-3.76	0.34	-3.23	10.38
Value Fund	-3.18	-2.14	-3.42	10.83
Contra Fund	-3.28	-2.62	-7.16	11.15
ELSS	-3.91	-1.07	-5.03	9.56
Equity Savings	-1.02	0.78	1.14	7.21
Arbitrage Fund	0.38	2.64	5.81	6.44
Dividend Yield Fund	-3.28	-3.71	-5.17	10.44
Aggressive Hybrid Fund	-2.76	-1.17	-3.78	9.06
Balanced Advantage	-2.27	-0.99	-2.81	7.51

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 19 Oct,

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