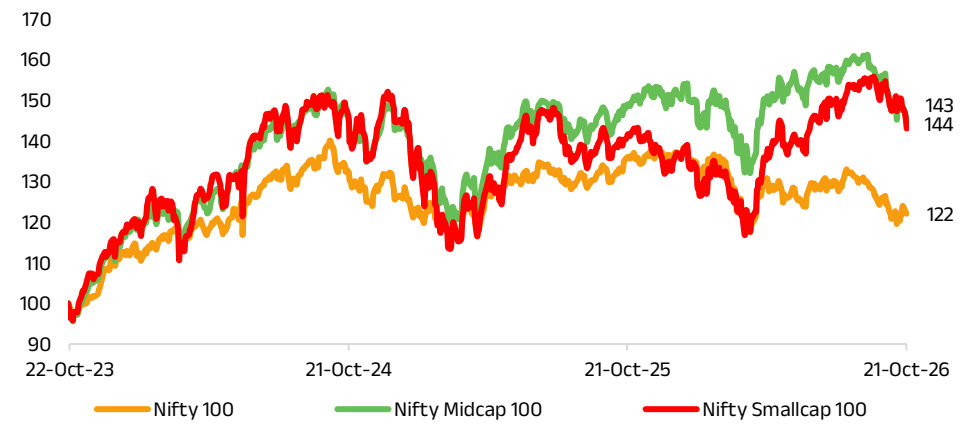
Daily Equity Market Pulse - October 22, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	21-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,811.35	-0.34%	0.83%	-2.58%
Nifty 100	23,762.45	-0.56%	0.31%	-3.25%
Nifty 200	13,103.15	-0.76%	-0.38%	-4.05%
Nifty 500	21,837.90	-0.92%	-0.91%	-4.47%
Nifty Large Midcap 250	15,526.95	-0.97%	-1.26%	-5.18%
Nifty Midcap 150	21,200.25	-1.39%	-2.84%	-7.08%
Nifty Next 50	67,655.30	-1.51%	-1.95%	-6.14%
Nifty Smallcap 250	17,041.95	-2.26%	-4.43%	-6.77%

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

Smart Beta Index

Index	21-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,210.45	-2.47%	-3.96%	-6.98%
NIFTY 500 Value 50	14,772.25	-1.02%	-1.35%	-5.65%
Nifty 200 Quality 30	19,156.10	-0.46%	-1.30%	-2.51%
Nifty 50 Equal Weight	30,743.20	-0.53%	-0.03%	-4.01%
NIFTY Alpha Low Volatility 30	24,581.60	-0.70%	-0.67%	-6.26%
Nifty High Beta 50	4,020.25	-1.99%	-3.34%	-7.38%
Nifty Low Volatility 50	22,993.70	-0.26%	-0.16%	-3.72%
Nifty Midcap150 Momentum 50	58,544.50	-2.06%	-3.78%	-7.16%
Nifty PSE	9,094.40	-1.05%	-2.01%	-5.31%
Nifty SME Emerge	14,448.00	-2.84%	-4.77%	-3.10%
Nifty 100 ESG	4,711.05	-0.55%	0.42%	-3.16%

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

Sector Indices

Index	21-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,196.65	-1.54%	0.16%	-7.20%
Nifty Bank	54,976.90	-0.92%	-0.61%	-2.65%
Nifty Consumption	10,833.30	-0.96%	-0.70%	-5.87%
Nifty Financial	24,691.45	-1.18%	-1.03%	-3.26%
Nifty FMCG	43,720.70	-0.58%	-3.43%	-4.75%
Nifty Healthcare	15,507.15	-0.32%	-1.00%	-7.68%
Nifty IT	32,422.50	2.88%	7.46%	12.46%
Nifty Media	1,622.65	-1.29%	-1.14%	4.29%
Nifty Metal	11,859.55	-1.71%	-1.23%	-8.58%
Nifty MNC	28,626.65	-2.10%	-4.32%	-9.30%
Nifty Pharma	25,565.90	-0.19%	-0.66%	-5.39%
Nifty Realty	805.85	-1.25%	-2.06%	-5.62%
Nifty Energy	35,474.75	-1.39%	-2.82%	-6.20%

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

Nifty 50 Top 5 Gainers

Company	21-Oct-26	Prev_Day	% Change	1 Week
Wipro	189.17	182.14	3.86	10.68
Infosys	1,168.00	1,130.70	3.30	7.35
HCL Tech	1,424.20	1,379.90	3.21	7.32
Tech Mahindra	1,834.70	1,779.10	3.13	16.47
TCS	2,529.00	2,460.90	2.77	9.72

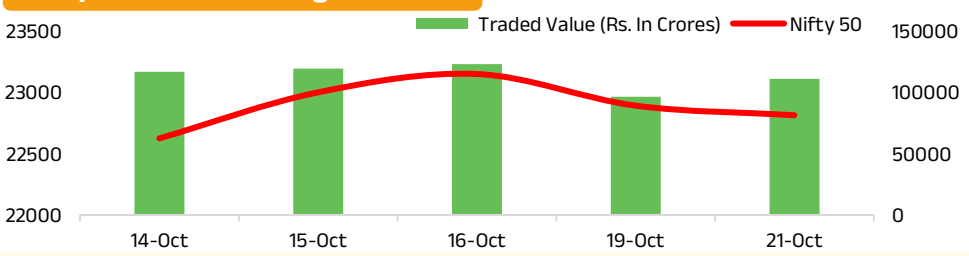
Source: NSE

Nifty 50 Top 5 Losers

Company	21-Oct-26	Prev_Day	% Change	1 Week
United Phos	514.50	530	-2.99	-5.01
Eicher Motors Limited	7,170.50	7349	-2.43	1.24
Maruti	11,200.00	11475	-2.40	0.20
BPCL	288.00	294	-2.14	-0.57
Axis Bank	1,210.00	1236	-2.10	-4.32

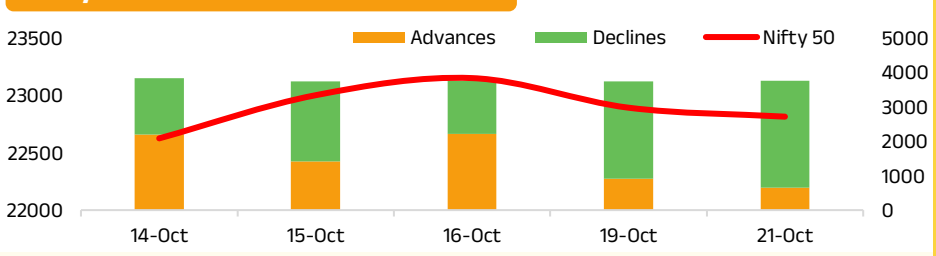
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

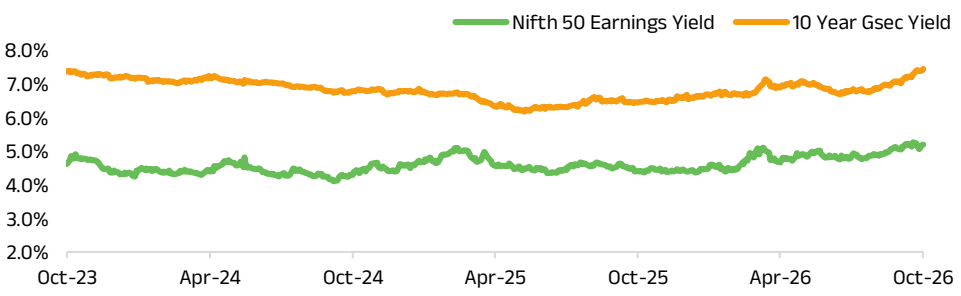
Indian equity markets surrendered their early gains as elevated crude oil prices and sustained foreign institutional investor selling outweighed optimism surrounding India-U.S. trade negotiations. Broad-based selling was witnessed across sectors.

Mahindra & Mahindra Financial Services reported strong Sep quarter performance, with standalone net profit rising 55% year-on-year to Rs. 882 crore, supported by robust business growth and lower credit costs.

Indian Hotels Company (IHCL) reported a 22% YoY increase in revenue and higher profitability for the Sep quarter of FY27, driven by strong demand across its hospitality portfolio.

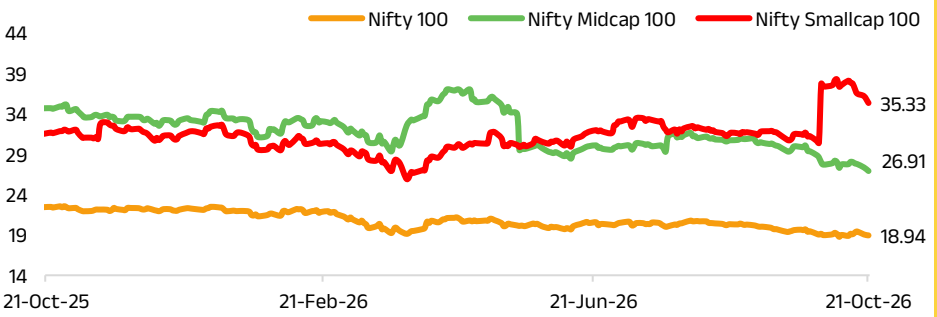
L&T won large government contracts worth Rs. 2,500-5,000 crore to construct secretariat buildings in New Delhi and office towers in Amaravati, strengthening its order book in the public infrastructure segment.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



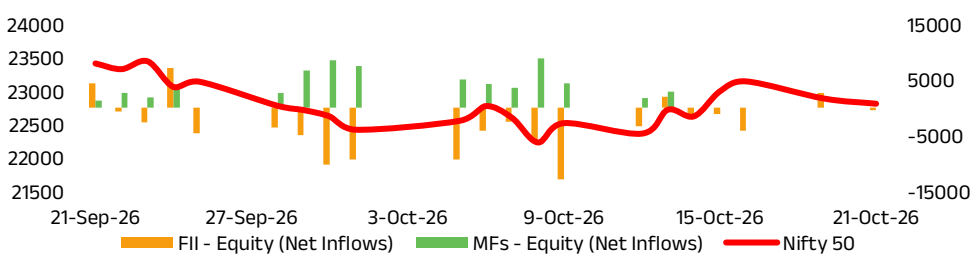
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-413.2	-49,870	-49,870	-310,173
MF**	2944.93	38,489	38,489	455,397
DII	1614.32	52,984	52,984	686,273

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

Daily Equity Market Pulse - October 22, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	22743.30	22895.20	-0.66%
Near Basis	-68.05	6.25	-1188.80%
Mid Futures	22845.00	23008.80	-0.71%
Mid Basis	33.65	119.85	-71.92%
Near Open Interest (Cr.)	1.53	1.64	-6.48%
Mid Open Interest (Cr.)	0.36	0.31	16.74%
Rollover (%)	21.84	18.46	18.28%
Put Call Ratio (OI)	0.78	0.86	-9.75%
Put Call Ratio(Vol)	1.10	1.04	5.92%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1496	2594	54572
Index Options	3580023	3604065	498529
Stock Futures	20869	23098	414981
Stock Options	31974	34090	99334
Total	3634362	3663847	1067416

Source: NSE

Global Equity Market

Global Indices	21-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4216.61	0.58%	0.58%	-0.11%
Nasdaq 100 (U.S.)	29822.52	1.13%	-0.43%	-2.16%
FTSE (U.K.)	10752.88	0.19%	0.26%	0.13%
DAX Index (Germany)	25645.04	1.35%	1.37%	0.27%
CAC 40 Index (France)	7921.68	1.06%	0.62%	-2.67%
SSE Composite (China)	3713.03	-0.60%	-1.44%	-6.00%
Nikkei (Japan)	64621.24	0.85%	-4.61%	-0.61%
Kospi (South Korea)	5735.66	3.29%	-4.55%	-18.15%
HangSeng (Hong Kong)	23651.87	-0.90%	-2.72%	-5.55%
Strait Times (Singapore)	5437.99	0.63%	0.27%	-4.18%
Ibovespa Sao Paulo (Brazil)	206495.23	-0.86%	-0.01%	10.66%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8831.30	0.16%	1.18%	1.14%
Jakarta Composite (Indonesia)	5328.36	0.94%	-10.34%	-16.55%
KLSE (Malaysia)	1602.27	0.17%	-1.56%	-3.88%

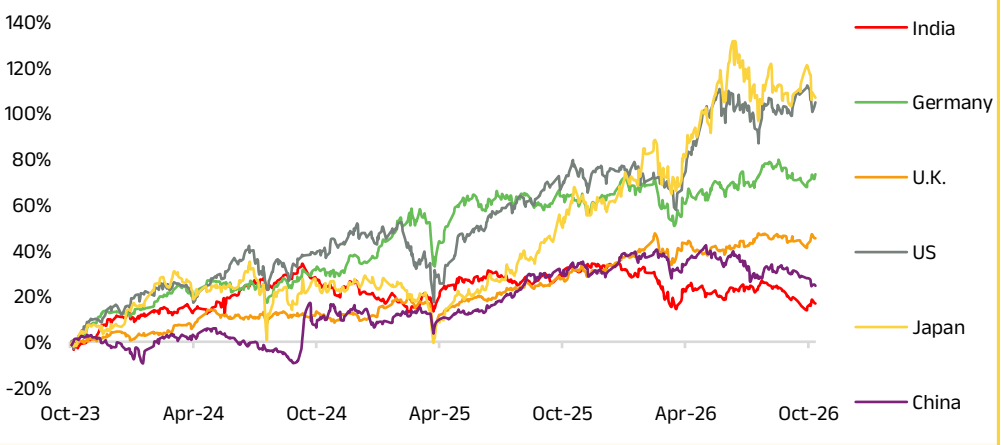
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	21-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	143,447	-1.31%	-1.49%	-6.01%
Gold ($/oz)	4,140.38	0.39%	0.86%	-4.67%
Silver (INR/1 kg)	206,507	-0.90%	-3.70%	-12.14%
Silver ($/oz)	57.97	-0.02%	4.19%	-12.20%
Brent Crude($/bbl)	135.07	-2.04%	-7.62%	1.73%
Crude Oil (INR/1 bbl)	9,270.00	-3.80%	3.38%	-3.52%
NYMEX Crude($/bbl)	103.85	-3.66%	8.08%	7.21%
Natural Gas (INR/1 mmbtu)	280.80	-5.17%	-10.20%	0.68%
Aluminium (INR/1 kg)	325.60	0.23%	-1.12%	-8.13%
Copper (INR/1 kg)	1,427.20	0.61%	-0.13%	-1.26%
Nickel (INR/1 kg)	1,537.90	2.21%	0.33%	-4.13%
Lead (INR/1 kg)	197.05	-0.73%	-0.81%	-1.18%
Zinc (INR/1 kg)	438.45	0.39%	0.64%	-2.02%
Mentha Oil (INR/1 kg)	1,383.80	-0.67%	-0.94%	2.28%
Baltic Dry Index	2,680	3.36%	0.49%	-21.15%

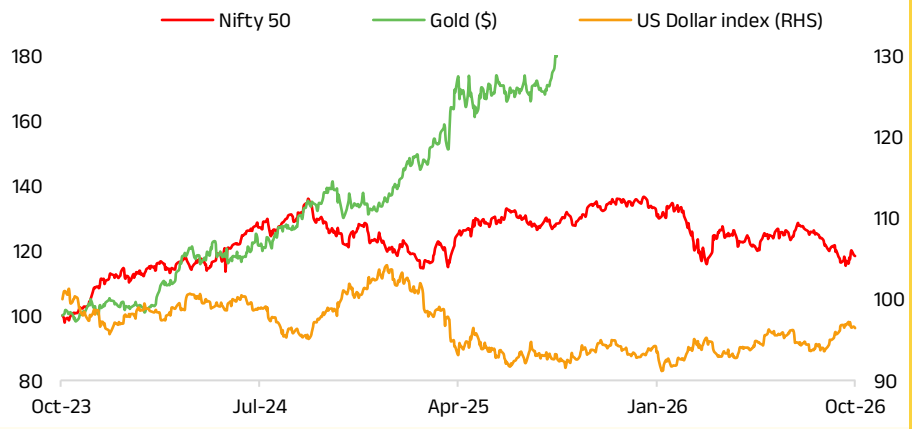
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-3.59	-4.95	-8.14	8.08
Flexi Cap Fund	-4.75	-1.70	-4.91	9.72
Mid Cap Fund	-7.15	-1.58	-2.09	13.13
Large & Mid Cap Fund	-5.75	-2.99	-5.02	11.11
Small Cap Fund	-6.63	6.69	4.45	12.21
Multi Cap Fund	-5.65	0.41	-2.10	11.46
Focused Fund	-4.88	-1.62	-4.31	9.95
Value Fund	-4.16	-3.85	-4.41	10.43
Contra Fund	-4.24	-3.93	-7.71	10.90
ELSS	-5.17	-3.24	-6.26	9.06
Equity Savings	-1.21	0.35	0.93	7.12
Arbitrage Fund	0.66	2.90	5.97	6.49
Dividend Yield Fund	-4.04	-5.04	-5.82	10.15
Aggressive Hybrid Fund	-3.63	-2.67	-4.59	8.73
Balanced Advantage	-3.00	-2.15	-3.41	7.25

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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