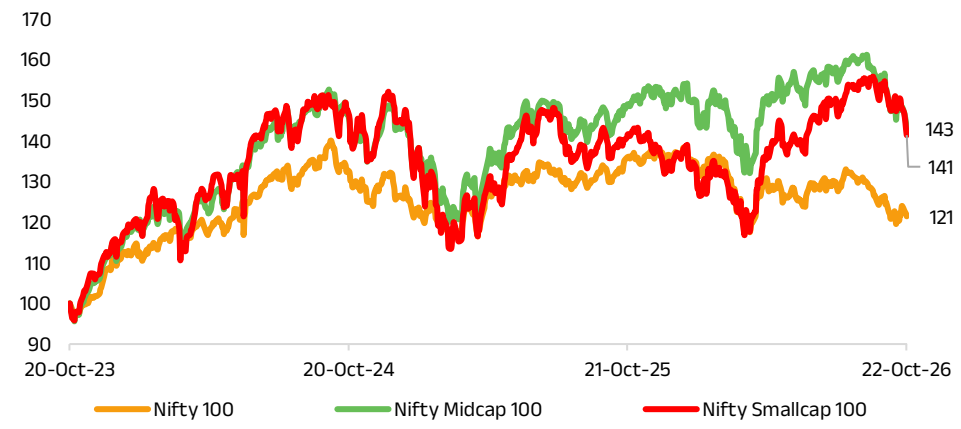
Daily Equity Market Pulse - October 23, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	22-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,687.65	-0.54%	-1.35%	-2.75%
Nifty 100	23,637.80	-0.52%	-1.45%	-3.40%
Nifty 200	13,025.50	-0.59%	-1.88%	-4.32%
Nifty 500	21,696.55	-0.65%	-2.18%	-4.82%
Nifty Large Midcap 250	15,423.75	-0.66%	-2.39%	-5.57%
Nifty Midcap 150	21,028.65	-0.81%	-3.34%	-7.72%
Nifty Next 50	67,354.15	-0.45%	-1.92%	-6.20%
Nifty Smallcap 250	16,856.20	-1.09%	-4.37%	-7.69%

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

Smart Beta Index

Index	22-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	27,994.55	-0.77%	-3.70%	-7.59%
NIFTY 500 Value 50	14,711.30	-0.41%	-1.68%	-6.08%
Nifty 200 Quality 30	18,949.55	-1.08%	-2.16%	-3.08%
Nifty 50 Equal Weight	30,563.60	-0.58%	-1.57%	-4.33%
NIFTY Alpha Low Volatility 30	24,515.70	-0.27%	-1.47%	-6.06%
Nifty High Beta 50	3,982.65	-0.94%	-4.26%	-8.13%
Nifty Low Volatility 50	22,903.25	-0.39%	-1.26%	-3.73%
Nifty Midcap150 Momentum 50	58,001.55	-0.93%	-3.83%	-7.90%
Nifty PSE	9,034.35	-0.66%	-2.41%	-6.06%
Nifty SME Emerge	14,329.50	-0.82%	-5.39%	-4.76%
Nifty 100 ESG	4,688.15	-0.49%	-1.17%	-3.22%

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

Sector Indices

Index	22-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,011.50	-0.73%	-2.21%	-7.66%
Nifty Bank	54,925.70	-0.09%	-1.59%	-2.29%
Nifty Consumption	10,753.25	-0.74%	-2.29%	-6.39%
Nifty Financial	24,657.70	-0.14%	-2.79%	-2.99%
Nifty FMCG	43,105.45	-1.41%	-3.76%	-5.59%
Nifty Healthcare	15,515.25	0.05%	-1.33%	-7.21%
Nifty IT	32,081.25	-1.05%	4.43%	12.24%
Nifty Media	1,584.50	-2.35%	-2.02%	0.62%
Nifty Metal	11,798.35	-0.52%	-1.83%	-9.18%
Nifty MNC	28,319.60	-1.07%	-3.97%	-9.69%
Nifty Pharma	25,596.65	0.12%	-0.86%	-4.88%
Nifty Realty	803.45	-0.30%	-3.05%	-6.74%
Nifty Energy	35,101.45	-1.05%	-3.07%	-6.96%

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

Nifty 50 Top 5 Gainers

Company	22-Oct-26	Prev_Day	% Change	1 Week
Cipla	1,330.90	1,314.00	1.29	0.22
Indian Oil	130.98	129.61	1.06	1.67
Ultratech Cem	10,958.00	10,849.00	1.00	0.88
ICICI Bank	1,398.50	1,385.00	0.97	0.66
Bajaj Auto	10,155.00	10,072.00	0.82	-2.21

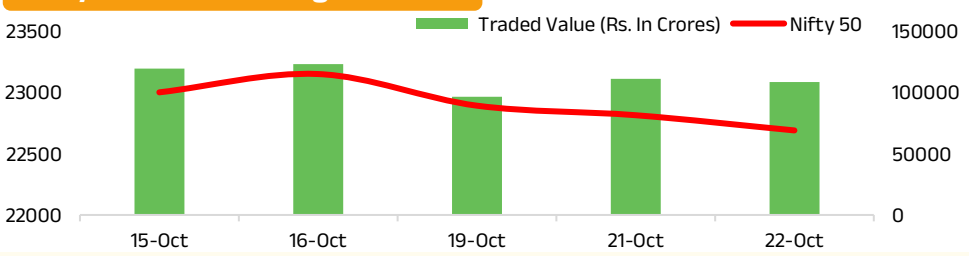
Source: NSE

Nifty 50 Top 5 Losers

Company	22-Oct-26	Prev_Day	% Change	1 Week
HDFC Standard Life Insu	528.35	540	-2.09	-4.03
Tata Motors	270.00	276	-2.07	-5.94
RIL	1,184.50	1209	-2.03	-2.51
HDFC Bank	694.05	707	-1.82	-4.51
Asian Paints	2,284.80	2319	-1.49	-2.77

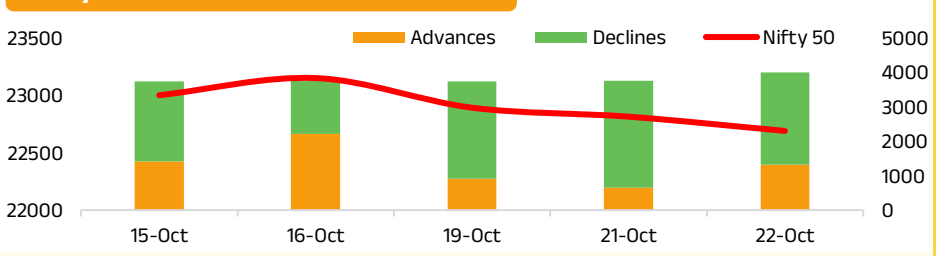
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

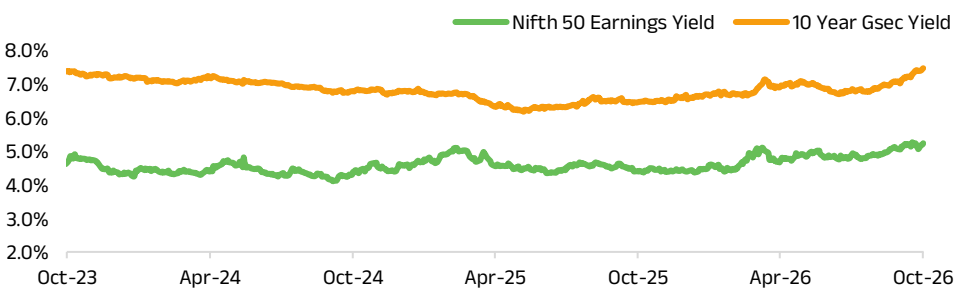
Indian equity markets extended their losses for a third consecutive session, pressured by rising crude oil prices amid supply concerns. Sentiment remained subdued as uncertainty in the energy market renewed fears of higher inflation and potential interest rate hikes.

Swiggy's out-of-home consumption business grew 34.9% year-on-year to Rs. 1,508 crore in GOV and recorded its seventh consecutive quarter of profitability, with an adjusted EBITDA margin of 0.5% of GOV.

Unicorn India Ventures announced the launch of its operations in the United States (U.S.) under the leadership of former Google executive Kishore Kanakamedala, who joined the fund as a Venture Partner. In this role, he will become an integral part of the firm's investment team.

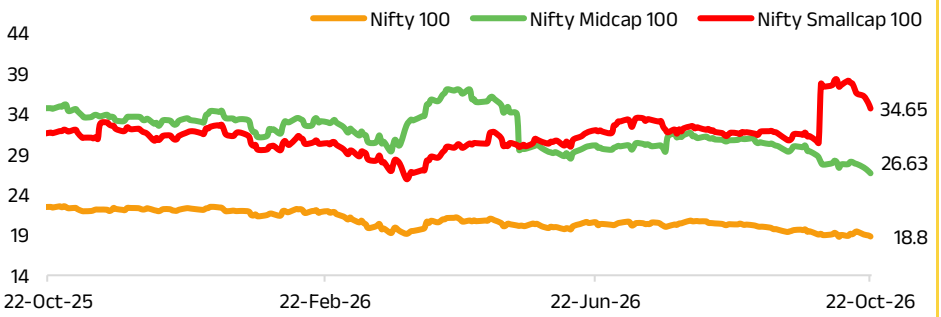
Sony India, a wholly owned subsidiary of Japanese technology major Sony Corporation, reported a profit of Rs. 157.03 crore and revenue from operations of Rs. 7,851.08 crore in FY25.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



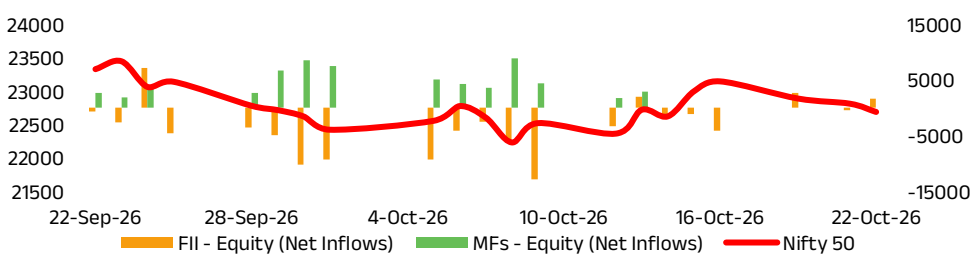
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1659.07	-48,211	-48,211	-308,514
MF**	2944.93	38,489	38,489	455,397
DII	2891.32	55,875	55,875	689,164

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

Daily Equity Market Pulse - October 23, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	22711.30	22743.30	-0.14%
Near Basis	23.65	-68.05	-134.75%
Mid Futures	22801.50	22845.00	-0.19%
Mid Basis	113.85	33.65	238.34%
Near Open Interest (Cr.)	1.38	1.53	-9.68%
Mid Open Interest (Cr.)	0.59	0.36	64.20%
Rollover (%)	32.52	21.84	48.93%
Put Call Ratio (OI)	0.88	0.78	12.78%
Put Call Ratio(Vol)	0.99	1.10	-10.30%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4624	4368	52592
Index Options	2686794	2687284	687449
Stock Futures	33355	30807	412204
Stock Options	45889	45606	99296
Total	2770663	2768064	1251541

Source: NSE

Global Equity Market

Global Indices	22-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4167.36	-1.17%	-1.00%	-1.28%
Nasdaq 100 (U.S.)	28958.69	-2.90%	-3.26%	-5.77%
FTSE (U.K.)	10725.03	-0.26%	-1.06%	0.16%
DAX Index (Germany)	25371.75	-1.07%	-0.04%	-0.81%
CAC 40 Index (France)	7811.26	-1.39%	-1.56%	-4.21%
SSE Composite (China)	3658.03	-1.48%	-1.33%	-7.44%
Nikkei (Japan)	62907.84	-2.65%	-2.36%	-3.25%
Kospi (South Korea)	5533.77	-3.52%	-0.37%	-21.15%
HangSeng (Hong Kong)	22934.68	-3.03%	-4.69%	-8.58%
Strait Times (Singapore)	5415.14	-0.42%	0.22%	-5.39%
Ibovespa Sao Paulo (Brazil)	204120.12	-1.15%	-0.10%	8.91%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8793.20	-0.43%	0.84%	0.40%
Jakarta Composite (Indonesia)	5387.90	1.12%	-8.12%	-14.16%
KLSE (Malaysia)	1608.14	0.37%	-0.96%	-4.48%

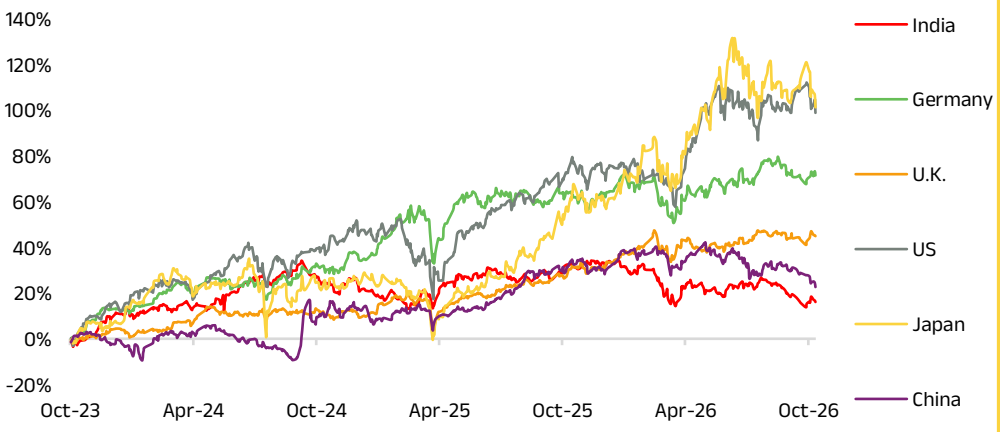
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	22-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	142,809	-0.44%	-1.86%	-5.97%
Gold ($/oz)	4,023.98	-2.81%	-3.51%	-7.60%
Silver (INR/1 kg)	200,853	-2.74%	-3.63%	-13.89%
Silver ($/oz)	54.52	-5.94%	-5.07%	-18.71%
Brent Crude($/bbl)	139.75	3.46%	-4.86%	5.47%
Crude Oil (INR/1 bbl)	9,202.00	-0.73%	1.83%	0.28%
NYMEX Crude($/bbl)	104.17	0.31%	-0.42%	8.16%
Natural Gas (INR/1 mmbtu)	264.30	-5.88%	-13.03%	-2.72%
Aluminium (INR/1 kg)	325.65	0.02%	0.85%	-7.33%
Copper (INR/1 kg)	1,383.50	-3.06%	-2.50%	-3.39%
Nickel (INR/1 kg)	1,540.00	0.14%	1.82%	-4.66%
Lead (INR/1 kg)	199.50	1.24%	0.81%	0.91%
Zinc (INR/1 kg)	436.45	-0.46%	-0.19%	-2.61%
Mentha Oil (INR/1 kg)	1,384.50	0.05%	-0.07%	1.79%
Baltic Dry Index	2,693	0.49%	5.82%	-21.53%

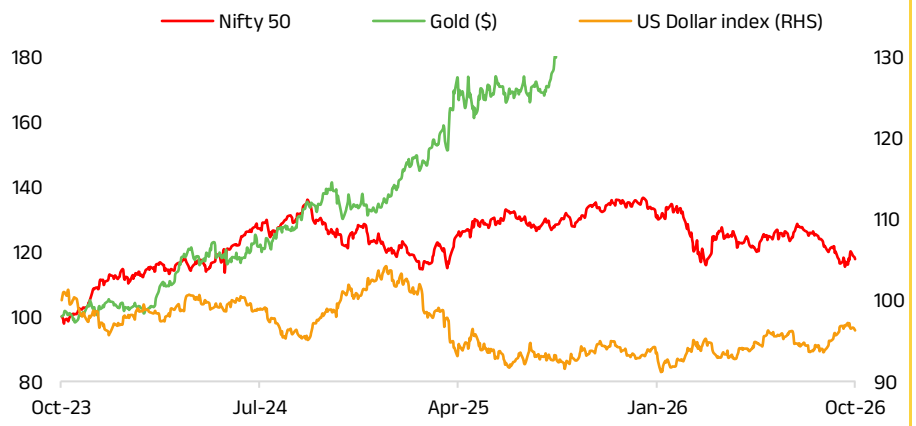
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-3.85	-5.01	-8.61	7.88
Flexi Cap Fund	-5.22	-2.13	-5.51	9.47
Mid Cap Fund	-7.83	-2.66	-2.87	12.81
Large & Mid Cap Fund	-6.28	-3.61	-5.67	10.83
Small Cap Fund	-7.47	4.97	3.51	11.86
Multi Cap Fund	-6.24	-0.44	-2.79	11.19
Focused Fund	-5.34	-1.96	-4.90	9.71
Value Fund	-4.76	-4.52	-5.10	10.15
Contra Fund	-4.74	-4.26	-8.26	10.65
ELSS	-5.65	-3.83	-6.87	8.81
Equity Savings	-1.49	0.13	0.60	6.99
Arbitrage Fund	0.54	2.73	5.80	6.43
Dividend Yield Fund	-4.37	-5.24	-6.40	9.91
Aggressive Hybrid Fund	-4.06	-3.01	-5.08	8.53
Balanced Advantage	-3.31	-2.35	-3.83	7.08

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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