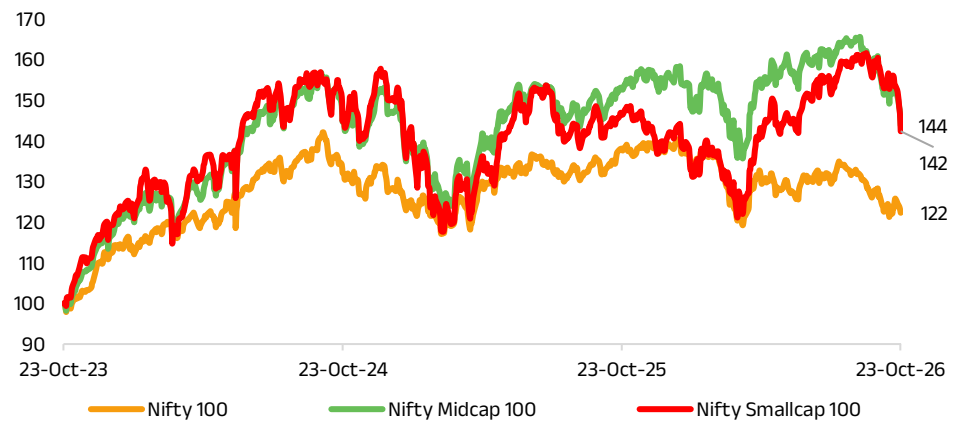
Daily Equity Market Pulse - October 26, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	23-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,600.00	-0.39%	-2.36%	-3.61%
Nifty 100	23,465.05	-0.73%	-2.77%	-4.66%
Nifty 200	12,892.40	-1.02%	-3.34%	-5.87%
Nifty 500	21,427.60	-1.24%	-3.78%	-6.57%
Nifty Large Midcap 250	15,209.55	-1.39%	-4.00%	-7.44%
Nifty Midcap 150	20,592.75	-2.07%	-5.26%	-10.19%
Nifty Next 50	65,828.60	-2.26%	-4.58%	-9.15%
Nifty Smallcap 250	16,385.15	-2.79%	-7.10%	-11.01%

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

Smart Beta Index

Index	23-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	27,301.75	-2.47%	-6.15%	-10.97%
NIFTY 500 Value 50	14,451.20	-1.77%	-3.46%	-8.59%
Nifty 200 Quality 30	18,680.00	-1.42%	-4.06%	-4.60%
Nifty 50 Equal Weight	30,366.85	-0.64%	-2.67%	-5.50%
NIFTY Alpha Low Volatility 30	24,348.80	-0.68%	-2.27%	-7.39%
Nifty High Beta 50	3,866.60	-2.91%	-6.57%	-11.60%
Nifty Low Volatility 50	22,739.30	-0.72%	-2.25%	-4.99%
Nifty Midcap150 Momentum 50	56,812.10	-2.05%	-5.73%	-10.72%
Nifty PSE	8,885.75	-1.64%	-3.91%	-7.80%
Nifty SME Emerge	13,972.80	-2.49%	-7.65%	-7.88%
Nifty 100 ESG	4,647.95	-0.86%	-2.95%	-4.53%

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

Sector Indices

Index	23-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	24,862.30	-0.60%	-3.52%	-8.45%
Nifty Bank	54,287.35	-1.16%	-2.79%	-4.00%
Nifty Consumption	10,726.75	-0.25%	-2.97%	-7.10%
Nifty Financial	24,403.00	-1.03%	-3.88%	-4.54%
Nifty FMCG	42,680.70	-0.99%	-4.34%	-7.74%
Nifty Healthcare	15,387.00	-0.83%	-1.89%	-8.78%
Nifty IT	31,995.50	-0.27%	0.22%	12.92%
Nifty Media	1,563.40	-1.33%	-5.15%	-0.22%
Nifty Metal	11,478.20	-2.71%	-5.40%	-13.71%
Nifty MNC	27,765.70	-1.96%	-5.93%	-12.11%
Nifty Pharma	25,329.45	-1.04%	-1.75%	-6.71%
Nifty Realty	784.35	-2.38%	-5.04%	-9.95%
Nifty Energy	34,520.05	-1.66%	-4.62%	-8.58%

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

Nifty 50 Top 5 Gainers

Company	23-Oct-26	Prev_Day	% Change	1 Week
Shree Cements Limited	22,735.00	22,330.00	1.81	1.22
ONGC	227.50	225.00	1.11	2.48
Asian Paints	2,307.00	2,284.80	0.97	-1.07
TCS	2,530.00	2,506.90	0.92	2.64
Ultratech Cem	11,050.00	10,958.00	0.84	1.31

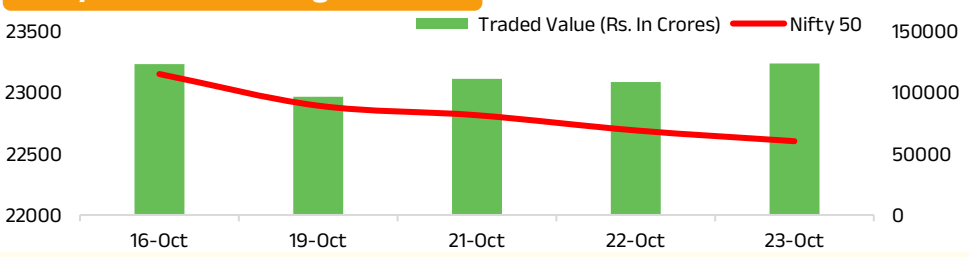
Source: NSE

Nifty 50 Top 5 Losers

Company	23-Oct-26	Prev_Day	% Change	1 Week
JSW Steel	1,185.50	1220	-2.83	-2.53
Adani Ports & SEZ	1,702.70	1750	-2.70	-2.75
Divi's Lab	8,950.00	9162	-2.31	-2.13
Tech Mahindra	1,790.00	1829	-2.14	0.00
Tata Motors	264.60	270	-2.00	-7.76

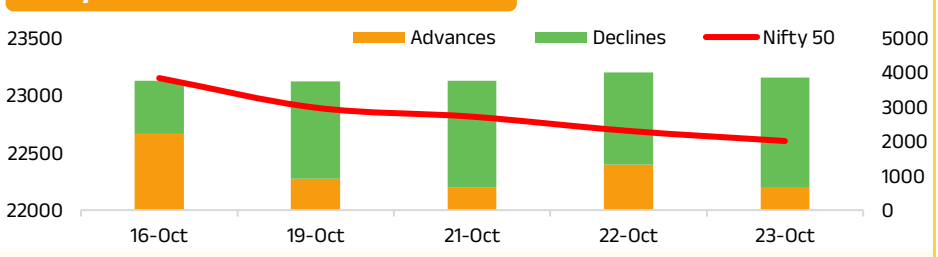
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

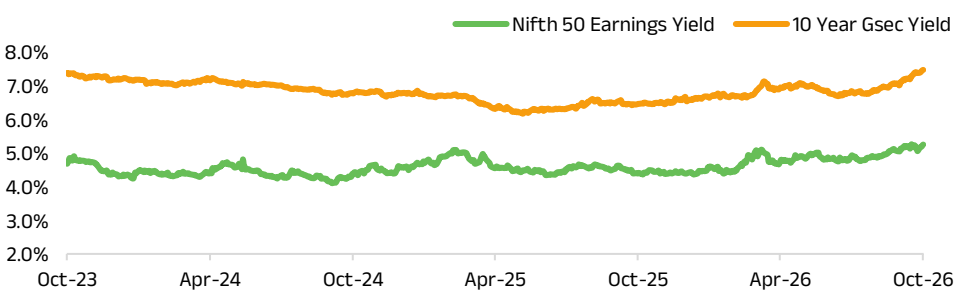
Indian equity markets extended their losses for a fourth consecutive session amid concerns over rising crude oil prices and expectations that interest rates may remain higher for longer. Investor sentiment remained subdued due to fears of further disruptions to global energy supplies following Houthi attacks on Saudi oil infrastructure and ports along the Red Sea.

Welspun Corp has secured an order worth approximately Rs. 5,500 crore from a major U.S. midstream company to supply coated line pipes for a natural gas pipeline project in the Permian region of the United States. The order has taken the company's global order book to a record US$5.25 billion (around Rs. 50,000 crore), its highest-ever level, the company said.

Hindustan Petroleum Corporation Ltd. (HPCL) has refinanced about Rs. 50,000 crore of debt at its Rajasthan refinery, securing a reduction of around 105 basis points in borrowing costs. The company expects annual interest savings of approximately Rs. 1,000 crore through a broader restructuring of the project's finances.

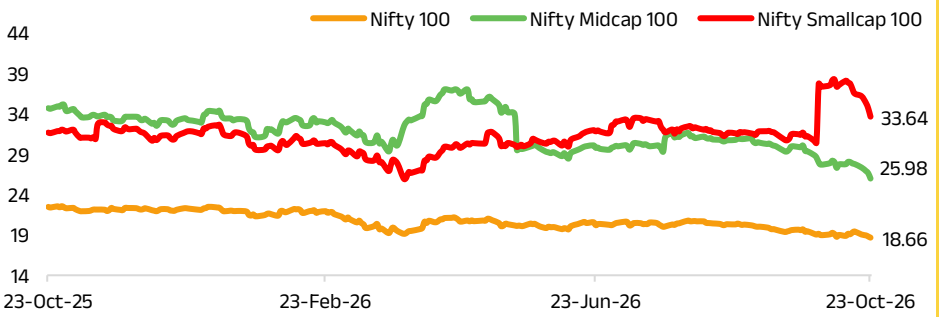
Godrej Properties reported a 62% decline in consolidated net profit to Rs. 154.15 crore for the quarter ended September 2026, primarily due to higher expenses. The company's net profit stood at Rs. 405.08 crore in the corresponding quarter of the previous year. Total income rose to Rs. 2,571.73 crore in Q2 FY2026-27 from Rs. 1,950.05 crore in the same period last year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



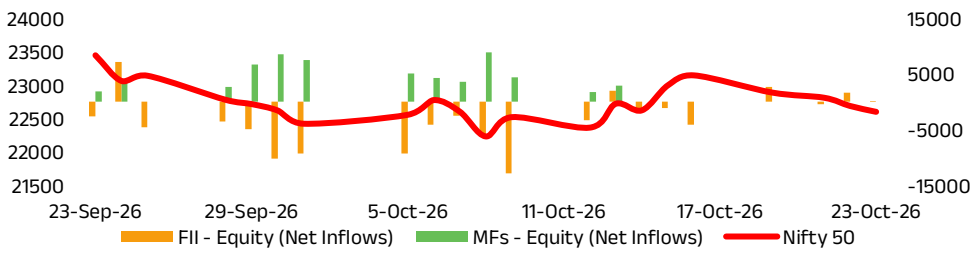
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	154.97	-48,056	-48,056	-308,359
MF**	2944.93	38,489	38,489	455,397
DII	3235.36	59,110	59,110	692,399

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

Daily Equity Market Pulse - October 26, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	22576.60	22711.30	-0.59%
Near Basis	-23.40	23.65	-198.94%
Mid Futures	22661.30	22801.50	-0.61%
Mid Basis	61.30	113.85	-46.16%
Near Open Interest (Cr.)	1.13	1.38	-18.01%
Mid Open Interest (Cr.)	0.86	0.59	44.62%
Rollover (%)	45.36	32.52	39.48%
Put Call Ratio (OI)	0.81	0.88	-7.25%
Put Call Ratio(Vol)	1.12	0.99	12.93%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	7866	8271	53664
Index Options	5703562	5779154	582383
Stock Futures	143689	142424	411308
Stock Options	40055	40026	98408
Total	5895173	5969876	1145763

Source: NSE

Global Equity Market

Global Indices	23-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4146.93	-0.49%	-0.37%	-1.01%
Nasdaq 100 (U.S.)	28957.53	0.00%	-0.79%	-4.96%
FTSE (U.K.)	10690.36	-0.32%	-1.76%	-0.14%
DAX Index (Germany)	25181.65	-0.75%	-1.72%	-0.90%
CAC 40 Index (France)	7782.82	-0.36%	-2.19%	-4.19%
SSE Composite (China)	3690.48	0.89%	-0.69%	-6.25%
Nikkei (Japan)	62693.16	-0.34%	-4.03%	-3.58%
Kospi (South Korea)	5550.30	0.30%	-2.08%	-21.62%
HangSeng (Hong Kong)	23093.37	0.69%	-4.52%	-7.01%
Strait Times (Singapore)	5422.16	0.13%	0.12%	-5.04%
Ibovespa Sao Paulo (Brazil)	205082.56	0.47%	-0.17%	10.37%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8795.20	0.02%	-0.13%	0.34%
Jakarta Composite (Indonesia)	5439.26	0.95%	4.90%	-14.68%
KLSE (Malaysia)	1611.56	0.21%	0.24%	-3.87%

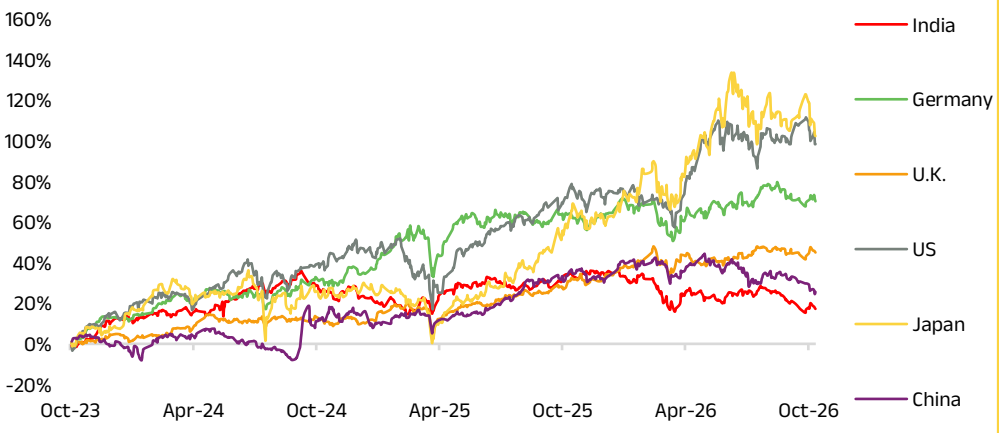
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	23-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	141,031	-1.25%	-3.33%	-6.86%
Gold ($/oz)	3,995.52	-0.71%	-4.07%	-6.80%
Silver (INR/1 kg)	194,170	-3.33%	-7.83%	-16.60%
Silver ($/oz)	53.89	-1.16%	-5.46%	-16.40%
Brent Crude($/bbl)	148.58	6.32%	3.83%	10.09%
Crude Oil (INR/1 bbl)	9,420.00	2.37%	1.14%	8.61%
NYMEX Crude($/bbl)	109.62	5.23%	1.40%	12.42%
Natural Gas (INR/1 mmbtu)	264.80	0.19%	-13.91%	-6.79%
Aluminium (INR/1 kg)	326.30	0.20%	-0.52%	-7.14%
Copper (INR/1 kg)	1,387.50	0.29%	-2.43%	-2.90%
Nickel (INR/1 kg)	1,543.20	0.21%	2.74%	-4.45%
Lead (INR/1 kg)	196.60	-1.45%	-1.60%	-2.04%
Zinc (INR/1 kg)	436.00	-0.10%	-0.46%	-1.85%
Mentha Oil (INR/1 kg)	1,390.60	0.44%	0.74%	2.50%
Baltic Dry Index	2,660	-1.23%	5.93%	-22.45%

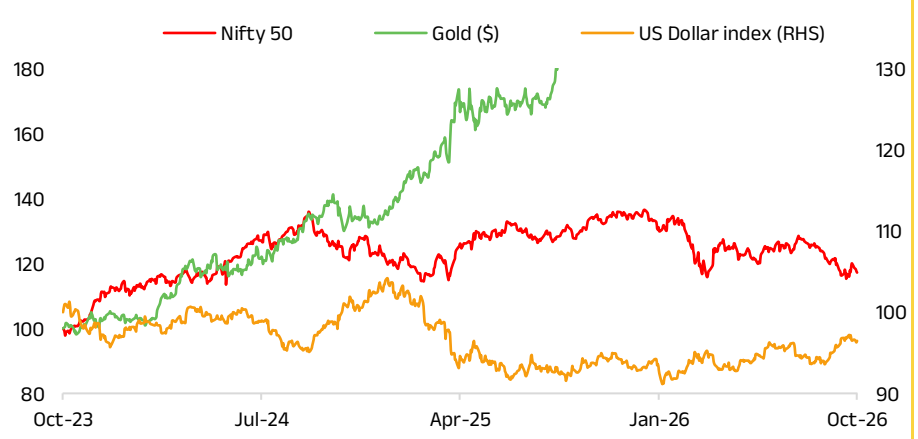
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-5.16	-4.88	-9.51	8.13
Flexi Cap Fund	-7.07	-2.74	-6.82	9.72
Mid Cap Fund	-10.21	-4.25	-4.72	12.97
Large & Mid Cap Fund	-8.22	-4.33	-7.03	11.02
Small Cap Fund	-10.25	2.96	0.83	12.27
Multi Cap Fund	-8.36	-1.48	-4.40	11.44
Focused Fund	-7.04	-2.47	-6.24	9.89
Value Fund	-6.71	-5.18	-6.85	10.43
Contra Fund	-6.57	-4.60	-9.59	10.87
ELSS	-7.58	-4.48	-8.38	9.05
Equity Savings	-1.96	0.10	0.33	7.13
Arbitrage Fund	0.59	2.90	6.04	6.50
Dividend Yield Fund	-5.86	-5.59	-7.70	10.19
Aggressive Hybrid Fund	-5.39	-3.34	-6.04	8.70
Balanced Advantage	-4.40	-2.53	-4.54	7.18

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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