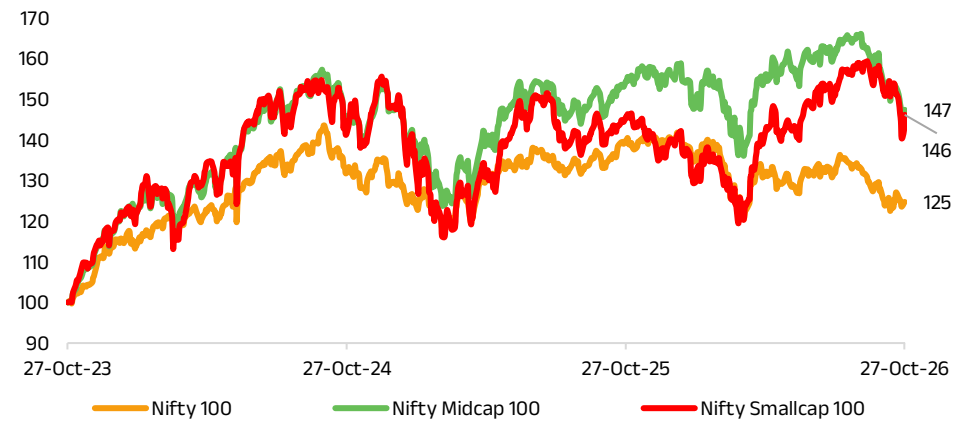
# Daily Equity Market Pulse - October 28, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

## Broad Indices Historical Movement




*Source: NSE*

## Broad Indices

| | 27-Oct-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty 50 | 22,749.75 | -0.02% | -0.61% | -1.69% |
| Nifty 100 | 23,689.95 | 0.22% | -0.86% | -2.54% |
| Nifty 200 | 13,047.05 | 0.37% | -1.18% | -3.31% |
| Nifty 500 | 21,734.90 | 0.58% | -1.39% | -3.84% |
| Nifty Large Midcap 250 | 15,431.95 | 0.56% | -1.57% | -4.47% |
| Nifty Midcap 150 | 21,003.15 | 0.92% | -2.31% | -6.39% |
| Nifty Next 50 | 67,343.95 | 1.30% | -1.97% | -6.18% |
| Nifty Smallcap 250 | 16,933.70 | 2.19% | -2.88% | -6.75% |

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

## Smart Beta Index

| Index | 27-Oct-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty 200 Momentum 30 Index | 28,343.35 | 1.72% | -2.01% | -6.24% |
| NIFTY 500 Value 50 | 14,615.30 | 0.17% | -2.07% | -6.57% |
| Nifty 200 Quality 30 | 18,824.35 | 0.08% | -2.18% | -3.24% |
| Nifty 50 Equal Weight | 30,711.45 | 0.30% | -0.64% | -3.07% |
| NIFTY Alpha Low Volatility 30 | 24,680.50 | 0.42% | -0.30% | -5.05% |
| Nifty High Beta 50 | 3,926.05 | 0.58% | -4.29% | -8.65% |
| Nifty Low Volatility 50 | 22,921.00 | 0.25% | -0.58% | -3.30% |
| Nifty Midcap150 Momentum 50 | 58,771.50 | 1.41% | -1.68% | -5.85% |
| Nifty PSE | 9,048.60 | 0.71% | -1.55% | -5.48% |
| Nifty SME Emerge | 14,293.50 | 1.45% | -3.88% | -5.99% |
| Nifty 100 ESG | 4,695.95 | 0.41% | -0.87% | -2.23% |

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

## Sector Indices

| Index | 27-Oct-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Nifty Auto | 25,340.80 | 1.48% | -0.98% | -6.03% |
| Nifty Bank | 53,974.90 | -0.72% | -2.73% | -2.89% |
| Nifty Consumption | 10,936.65 | 1.22% | -0.02% | -4.19% |
| Nifty Financial | 24,303.75 | -0.62% | -2.73% | -3.15% |
| Nifty FMCG | 43,118.20 | 0.74% | -1.95% | -6.15% |
| Nifty Healthcare | 15,917.60 | 1.65% | 2.31% | -4.56% |
| Nifty IT | 32,189.45 | -0.26% | 2.14% | 14.31% |
| Nifty Media | 1,615.05 | 3.66% | -1.75% | 4.15% |
| Nifty Metal | 11,806.70 | 0.64% | -2.15% | -9.78% |
| Nifty MNC | 28,285.65 | 1.22% | -3.26% | -9.77% |
| Nifty Pharma | 26,267.25 | 1.91% | 2.55% | -2.72% |
| Nifty Realty | 805.05 | 1.94% | -1.35% | -7.40% |
| Nifty Energy | 35,261.85 | 0.68% | -1.98% | -5.82% |

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

## Nifty 50 Top 5 Gainers

| Company | 27-Oct-26 | Prev_Day | % Change | 1 Week |
|---|---|---|---|---|
| Tata Beverages | 1,000.00 | 936.50 | 6.78 | 3.47 |
| Divi's Lab | 9,505.50 | 9,050.00 | 5.03 | 4.61 |
| United Phos | 519.00 | 497.70 | 4.28 | -2.14 |
| Bharti Airtel | 1,978.80 | 1,917.50 | 3.20 | 5.52 |
| Bajaj Auto | 10,390.00 | 10,071.00 | 3.17 | 1.00 |

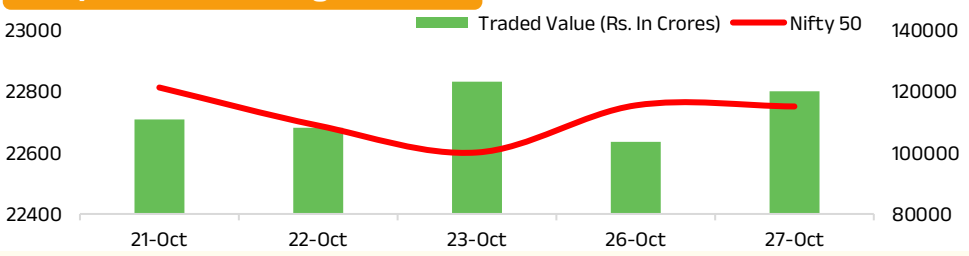
Source: NSE

## Nifty 50 Top 5 Losers

| Company | 27-Oct-26 | Prev_Day | % Change | 1 Week |
|---|---|---|---|---|
| Asian Paints | 2,277.00 | 2322 | -1.94 | -2.30 |
| Coal India | 398.00 | 405 | -1.73 | -3.33 |
| Grasim Indus | 2,900.80 | 2950 | -1.67 | 0.76 |
| SBI | 945.10 | 961 | -1.63 | -2.94 |
| TCS | 2,496.90 | 2535 | -1.50 | 1.46 |

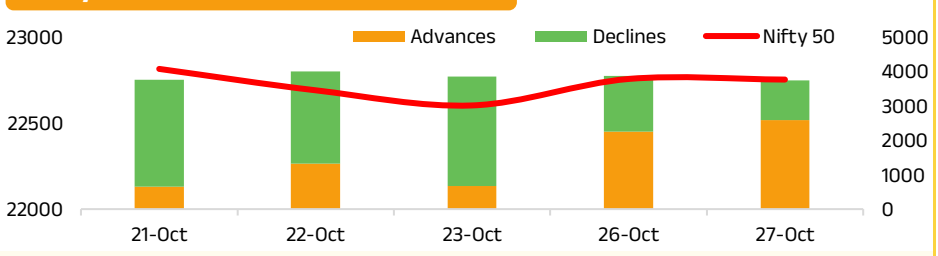
Source: NSE

## Nifty 50 vs NSE Trading Volume




Source: NSE

## Nifty 50 vs Advances & Declines




Source: NSE

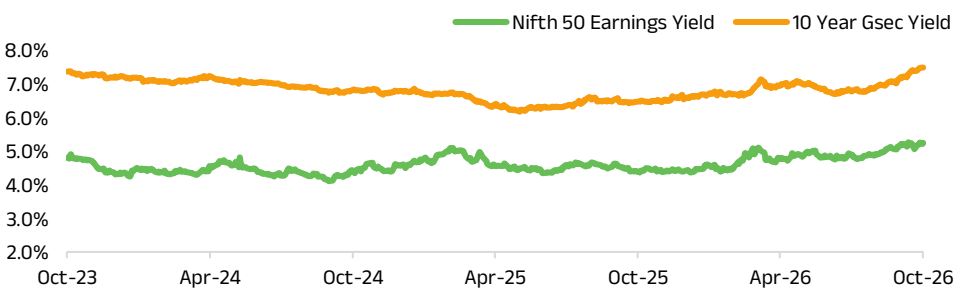
Indian equity markets fluctuated before ending on a flat note, as elevated crude oil prices heightened inflationary concerns and expectations of potential interest rate hikes, while caution ahead of this week's U.S. Federal Reserve policy decision overshadowed supportive global cues.

Ather Energy reported a profit after tax of Rs. 1.26 crore and said its board has approved plans to increase annual production capacity across its plants by an additional 225,000 units per annum by the July-September quarter of FY2027-28 (Q2FY28).

Larsen & Toubro (L&T) said its transportation business vertical has secured major design-and-build orders for two key system packages of the Dhaka Mass Rapid Transit Development Project (Line 1), also known as the Dhaka Metro, in Bangladesh.

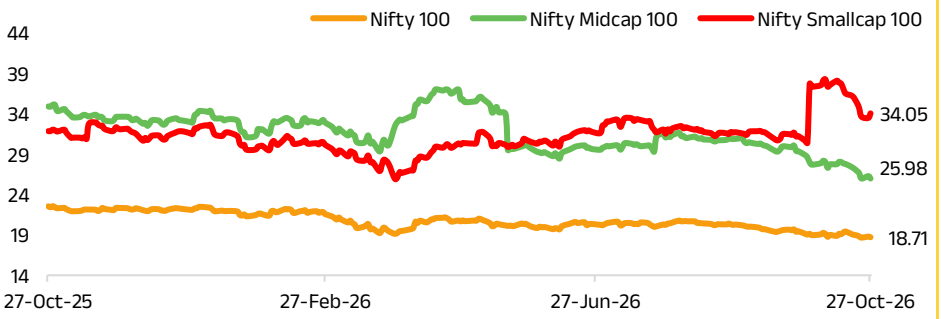
Hyundai Motor India Ltd. (HMIL) expects sales of at least 250,000 units of its mid-size sport utility vehicles (SUVs), including the Creta and the newly launched Bayon, in 2027, driven by strong growth in the segment over the past several years and the models' ability to attract different customer groups.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



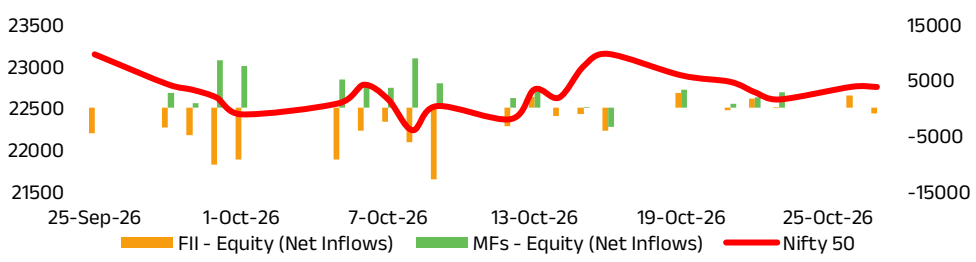

Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## 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 | -963.56 | -46,748 | -46,748 | -307,051 |
| MF** | 2802.33 | 43,787 | 43,787 | 454,775 |
| DII | -1250.03 | 60,470 | 60,470 | 693,759 |

Source: SEBI, NSDL;**As on 23rd Oct 2026;

# Daily Equity Market Pulse - October 28, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

## F&O Trends

| | Latest | Previous | Change % |
|---|---|---|---|
| Near Futures | 22776.70 | 22767.30 | 0.04% |
| Near Basis | 26.95 | 14.10 | 91.13% |
| Mid Futures | 22843.80 | 22891.40 | -0.21% |
| Mid Basis | 94.05 | 138.20 | -31.95% |
| Near Open Interest (Cr.) | 0.63 | 0.82 | -23.00% |
| Mid Open Interest (Cr.) | 1.56 | 1.22 | 27.17% |
| Rollover (%) | 72.65 | 61.76 | 17.64% |
| Put Call Ratio (OI) | 1.05 | 1.11 | -6.05% |
| Put Call Ratio(Vol) | 1.01 | 1.03 | -1.36% |

Source: NSE

## FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---|---|---|---|
| Index Futures | 13207 | 12766 | 56791 |
| Index Options | 2464472 | 2473469 | 705778 |
| Stock Futures | 109175 | 104459 | 407800 |
| Stock Options | 52223 | 53707 | 86995 |
| Total | 2639078 | 2644401 | 1257364 |

Source: NSE

## Global Equity Market

| Global Indices | 27-Oct-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Russell 1000 Index (U.S.) | 4198.49 | 0.58% | 0.15% | -0.22% |
| Nasdaq 100 (U.S.) | 29651.44 | 1.29% | 0.55% | -3.13% |
| FTSE (U.K.) | 10686.54 | -0.75% | -0.43% | -0.08% |
| DAX Index (Germany) | 25590.77 | 0.71% | 1.13% | 0.72% |
| CAC 40 Index (France) | 7887.14 | 0.51% | 0.62% | -2.36% |
| SSE Composite (China) | 3648.30 | -1.33% | -2.33% | -6.17% |
| Nikkei (Japan) | 63268.37 | 1.73% | -1.26% | -4.66% |
| Kospi (South Korea) | 5638.34 | 3.09% | 1.54% | -20.37% |
| HangSeng (Hong Kong) | 23041.32 | -0.73% | -3.46% | -5.99% |
| Strait Times (Singapore) | 5397.03 | -0.35% | -0.13% | -5.50% |
| Ibovespa Sao Paulo (Brazil) | 175710.05 | -0.51% | -15.64% | -4.23% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8850.10 | 0.46% | 0.38% | 2.14% |
| Jakarta Composite (Indonesia) | 5266.13 | -1.99% | -0.24% | -15.63% |
| KLSE (Malaysia) | 1611.85 | 0.47% | 0.77% | -3.58% |

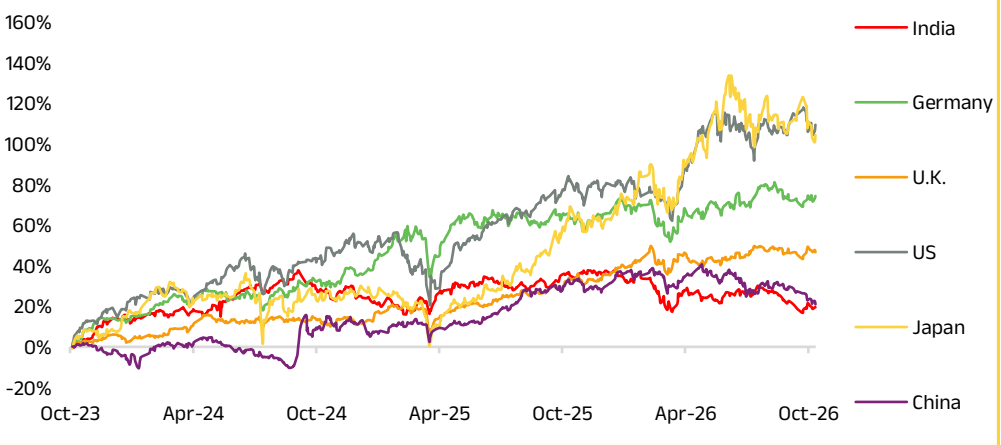
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

| Commodity Prices | 27-Oct-26 | 1 Day | 1 Week | 1 Month |
|---|---|---|---|---|
| Gold (INR/10 gm) | 140,819 | -0.25% | -3.12% | -6.97% |
| Gold ($/oz) | 4,057.80 | 1.03% | -1.61% | -5.33% |
| Silver (INR/1 kg) | 192,193 | -1.20% | -7.77% | -17.08% |
| Silver ($/oz) | 54.36 | 0.80% | -6.24% | -15.43% |
| Brent Crude($/bbl) | 146.29 | -1.88% | 6.10% | 7.72% |
| Crude Oil (INR/1 bbl) | 9,683.00 | -1.24% | 0.49% | 6.71% |
| NYMEX Crude($/bbl) | 103.27 | -1.79% | -4.19% | 10.56% |
| Natural Gas (INR/1 mmbtu) | 247.60 | -1.24% | -16.38% | -21.70% |
| Aluminium (INR/1 kg) | 330.25 | 0.06% | 1.66% | -5.72% |
| Copper (INR/1 kg) | 1,403.35 | 0.24% | -1.07% | -1.35% |
| Nickel (INR/1 kg) | 1,531.70 | 0.00% | 1.80% | -3.85% |
| Lead (INR/1 kg) | 198.65 | -0.67% | 0.08% | 1.35% |
| Zinc (INR/1 kg) | 439.30 | 0.03% | 0.58% | -1.46% |
| Mentha Oil (INR/1 kg) | 1,403.70 | -0.03% | 0.76% | 3.49% |
| Baltic Dry Index | 2,603 | -0.95% | 0.39% | -24.02% |

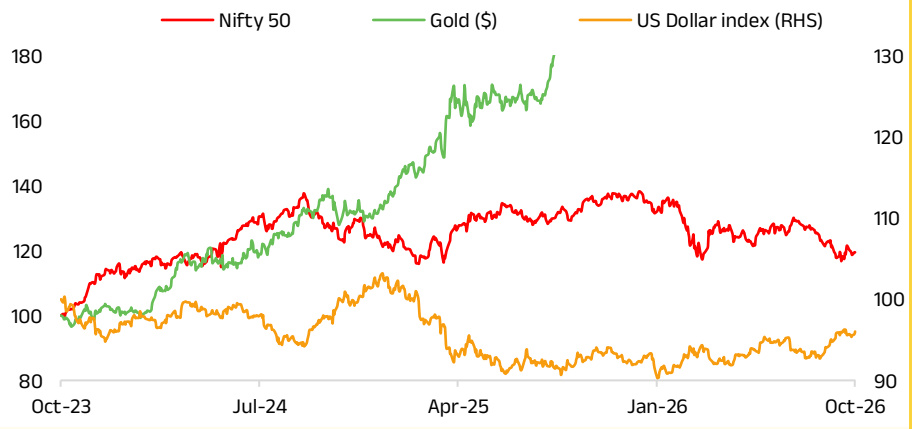
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## 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 | -2.65 | -3.42 | -8.56 | 8.86 |
| Flexi Cap Fund | -4.20 | -1.06 | -5.51 | 10.49 |
| Mid Cap Fund | -5.92 | -2.00 | -2.88 | 13.89 |
| Large & Mid Cap Fund | -4.72 | -2.72 | -5.74 | 11.82 |
| Small Cap Fund | -6.63 | 5.03 | 3.08 | 13.07 |
| Multi Cap Fund | -4.88 | 0.47 | -2.66 | 12.35 |
| Focused Fund | -4.00 | -0.81 | -5.06 | 10.69 |
| Value Fund | -4.41 | -4.21 | -6.09 | 10.94 |
| Contra Fund | -3.84 | -4.01 | -9.15 | 11.28 |
| ELSS | -4.54 | -2.97 | -7.10 | 9.80 |
| Equity Savings | -1.13 | 0.57 | 0.61 | 7.29 |
| Arbitrage Fund | 0.50 | 2.86 | 5.90 | 6.45 |
| Dividend Yield Fund | -4.18 | -4.76 | -7.14 | 10.69 |
| Aggressive Hybrid Fund | -3.07 | -2.12 | -5.09 | 9.27 |
| Balanced Advantage | -2.52 | -1.56 | -3.89 | 7.60 |

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.

**Disclaimer:**

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

**MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.**