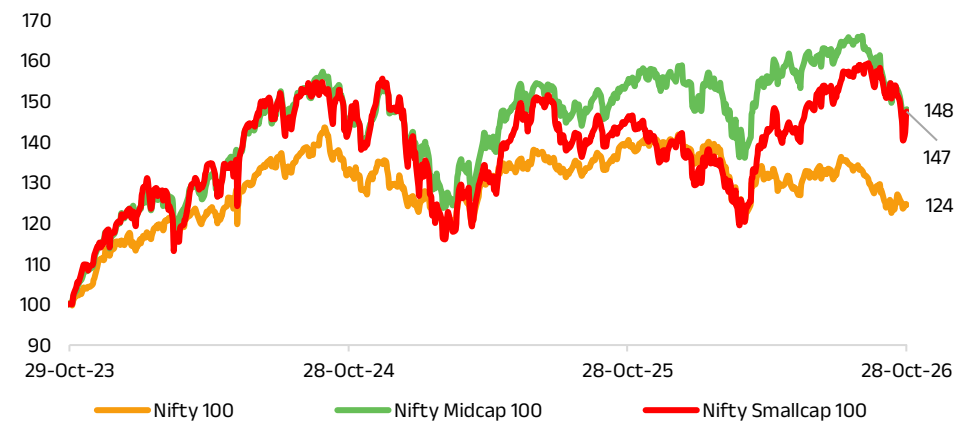
Daily Equity Market Pulse - October 29, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	28-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,698.85	-0.22%	-0.49%	-0.36%
Nifty 100	23,644.10	-0.19%	-0.50%	-1.10%
Nifty 200	13,037.70	-0.07%	-0.50%	-1.77%
Nifty 500	21,727.45	-0.03%	-0.51%	-2.27%
Nifty Large Midcap 250	15,438.85	0.04%	-0.57%	-2.83%
Nifty Midcap 150	21,064.80	0.29%	-0.64%	-4.56%
Nifty Next 50	67,303.70	-0.06%	-0.52%	-4.28%
Nifty Smallcap 250	16,989.40	0.33%	-0.31%	-4.89%

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

Smart Beta Index

Index	28-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,473.35	0.46%	0.93%	-3.85%
NIFTY 500 Value 50	14,595.75	-0.13%	-1.19%	-4.86%
Nifty 200 Quality 30	18,770.30	-0.29%	-2.01%	-2.47%
Nifty 50 Equal Weight	30,727.00	0.05%	-0.05%	-1.65%
NIFTY Alpha Low Volatility 30	24,723.90	0.18%	0.58%	-3.69%
Nifty High Beta 50	3,948.70	0.58%	-1.78%	-5.93%
Nifty Low Volatility 50	22,873.40	-0.21%	-0.52%	-2.41%
Nifty Midcap150 Momentum 50	59,150.55	0.64%	1.04%	-3.47%
Nifty PSE	8,993.65	-0.61%	-1.11%	-4.22%
Nifty SME Emerge	14,251.00	-0.30%	-1.36%	-5.15%
Nifty 100 ESG	4,685.40	-0.22%	-0.54%	-0.89%

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

Sector Indices

Index	28-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,707.35	1.45%	2.03%	-3.08%
Nifty Bank	54,267.40	0.54%	-1.29%	-0.37%
Nifty Consumption	10,944.35	0.07%	1.03%	-2.89%
Nifty Financial	24,418.25	0.47%	-1.11%	-1.03%
Nifty FMCG	42,878.35	-0.56%	-1.93%	-5.27%
Nifty Healthcare	16,100.10	1.15%	3.82%	-2.64%
Nifty IT	31,553.40	-1.98%	-2.68%	12.34%
Nifty Media	1,637.40	1.38%	0.91%	6.38%
Nifty Metal	11,769.35	-0.32%	-0.76%	-8.44%
Nifty MNC	28,460.75	0.62%	-0.58%	-7.69%
Nifty Pharma	26,541.35	1.04%	3.82%	-0.82%
Nifty Realty	797.85	-0.89%	-0.99%	-6.23%
Nifty Energy	34,946.30	-0.89%	-1.49%	-4.76%

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

Nifty 50 Top 5 Gainers

Company	28-Oct-26	Prev_Day	% Change	1 Week
L&T Ltd.	3,801.30	3,665.10	3.72	4.55
United Phos	536.40	519.00	3.35	4.26
IndusInd Bank	851.00	833.30	2.12	0.17
SBI Life Insurance Company Lim	1,666.70	1,633.00	2.06	0.34
Hero Moto	5,322.50	5,218.50	1.99	3.28

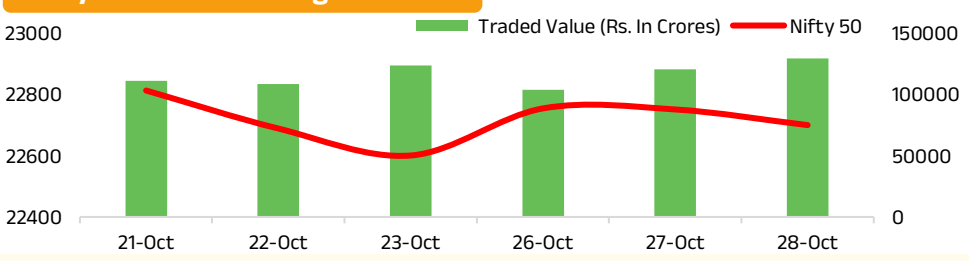
Source: NSE

Nifty 50 Top 5 Losers

Company	28-Oct-26	Prev_Day	% Change	1 Week
Infosys	1,123.15	1163	-3.43	-3.84
RIL	1,158.00	1196	-3.19	-4.22
BPCL	287.00	296	-2.91	-0.35
ONGC	224.89	230	-2.16	-0.32
Tech Mahindra	1,776.60	1811	-1.92	-3.17

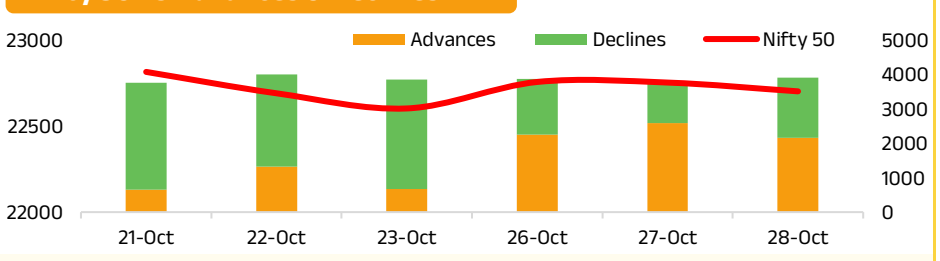
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

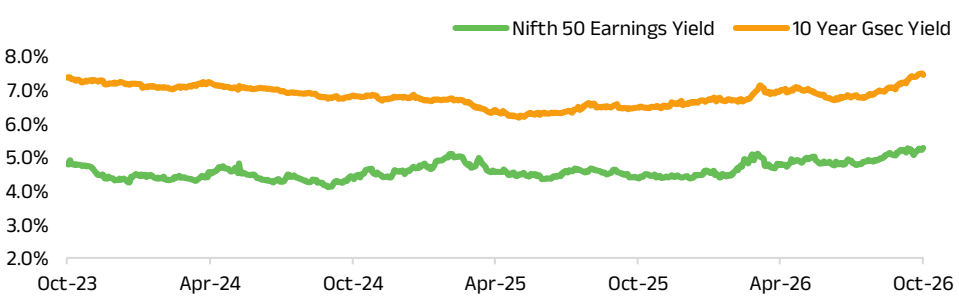
Indian equity markets declined, weighed down by a fall in information technology stocks amid renewed optimism around artificial intelligence in global markets. Investor sentiment also remained cautious as market participants closely monitored the upcoming U.S. midterm elections for greater clarity on the geopolitical and economic outlook.

Hindustan Unilever (HUL) reported a 4% year-on-year increase in consolidated net profit attributable to shareholders in the Jul-Sep quarter of FY27, despite a one-off tax-related gain of Rs. 273 crore being included in the base period's exceptional items.

Carlsberg India moved closer to a public listing by filing an updated draft prospectus for its initial public offering (IPO) on Oct. 27, 2026. This marks the company's first public IPO prospectus after it confidentially filed draft papers for the proposed offering in Jul. 2026.

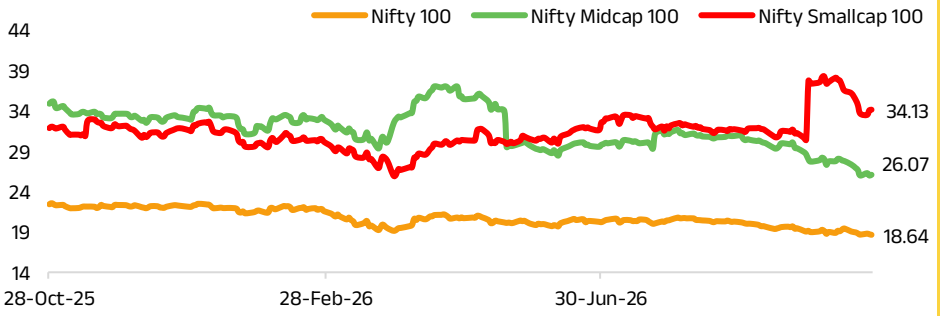
Tata Projects, the country's leading technology-driven engineering, procurement, and construction (EPC) company, announced that it has secured an order from Gujarat State Fertilizers & Chemicals Ltd. (GSFC) to develop an integrated phosphoric acid-sulphuric acid complex in Gujarat.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



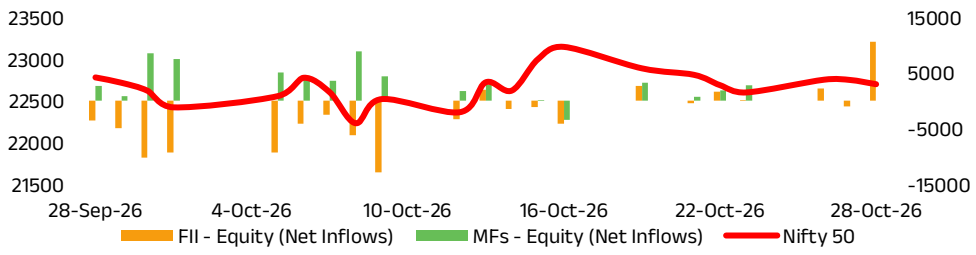
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	10583.9	-36,164	-36,164	-296,467
MF**	2802.33	43,787	43,787	454,775
DII	643.35	61,113	61,113	694,402

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

Daily Equity Market Pulse - October 29, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	22778.00	22776.70	0.01%
Near Basis	79.15	26.95	193.69%
Mid Futures	22928.80	22843.80	0.37%
Mid Basis	229.95	94.05	144.50%
Near Open Interest (Cr.)	1.61	0.63	153.57%
Mid Open Interest (Cr.)	0.13	1.56	-91.76%
Rollover (%)	7.58	72.65	-89.57%
Put Call Ratio (OI)	1.07	1.05	2.50%
Put Call Ratio(Vol)	0.95	1.01	-5.84%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	9161	12011	44432
Index Options	4073683	4052977	389264
Stock Futures	36284	33124	386374
Stock Options	18905	18521	21960
Total	4138034	4116633	842029

Source: NSE

Global Equity Market

Global Indices	28-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4209.65	0.27%	-0.16%	0.87%
Nasdaq 100 (U.S.)	29813.16	0.55%	-0.03%	-1.53%
FTSE (U.K.)	10694.50	0.07%	-0.54%	0.09%
DAX Index (Germany)	25704.02	0.44%	0.23%	1.30%
CAC 40 Index (France)	7886.96	0.00%	-0.44%	-2.37%
SSE Composite (China)	3681.47	0.91%	-0.85%	-3.72%
Nikkei (Japan)	63954.19	1.08%	-1.03%	-2.92%
Kospi (South Korea)	6012.44	6.63%	4.83%	-12.73%
HangSeng (Hong Kong)	23094.83	0.23%	-2.36%	-6.28%
Strait Times (Singapore)	5397.91	0.02%	-0.74%	-5.78%
Ibovespa Sao Paulo (Brazil)	171006.10	-2.68%	-17.19%	-6.55%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8847.30	-0.03%	0.18%	1.93%
Jakarta Composite (Indonesia)	5282.31	0.31%	-0.86%	-14.08%
KLSE (Malaysia)	1613.87	0.13%	0.72%	-3.36%

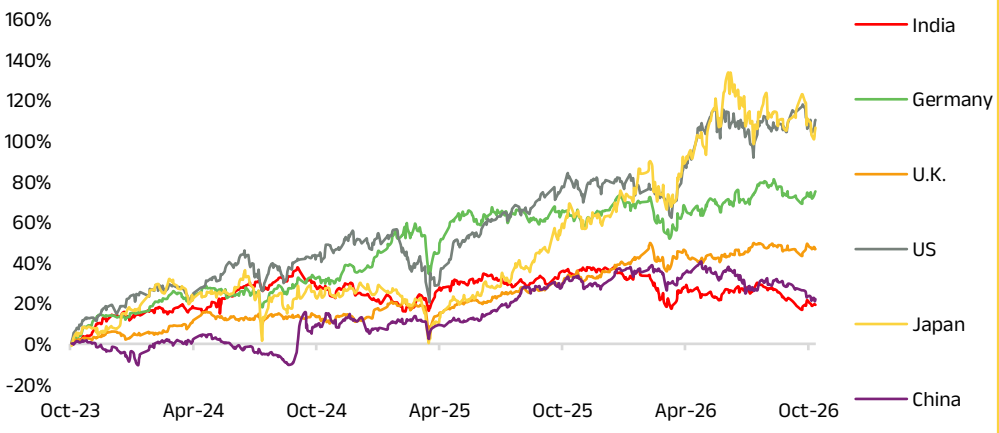
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	28-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	142,253	1.02%	-0.83%	-3.49%
Gold ($/oz)	4,067.04	0.23%	-1.77%	-1.15%
Silver (INR/1 kg)	193,477	0.67%	-6.31%	-13.24%
Silver ($/oz)	53.98	-0.71%	-6.89%	-11.47%
Brent Crude($/bbl)	145.52	-0.53%	7.74%	6.84%
Crude Oil (INR/1 bbl)	9,507.00	-1.82%	2.56%	7.29%
NYMEX Crude($/bbl)	106.15	2.79%	2.21%	13.41%
Natural Gas (INR/1 mmbtu)	256.70	3.68%	-8.58%	-16.25%
Aluminium (INR/1 kg)	334.30	1.23%	2.67%	-4.10%
Copper (INR/1 kg)	1,412.00	0.62%	-1.07%	-1.58%
Nickel (INR/1 kg)	1,540.80	0.59%	0.19%	-3.92%
Lead (INR/1 kg)	197.10	-0.78%	0.03%	1.39%
Zinc (INR/1 kg)	437.70	-0.36%	-0.17%	2.64%
Mentha Oil (INR/1 kg)	1,417.40	0.98%	2.43%	3.32%
Baltic Dry Index	2,652	1.88%	-1.04%	-18.85%

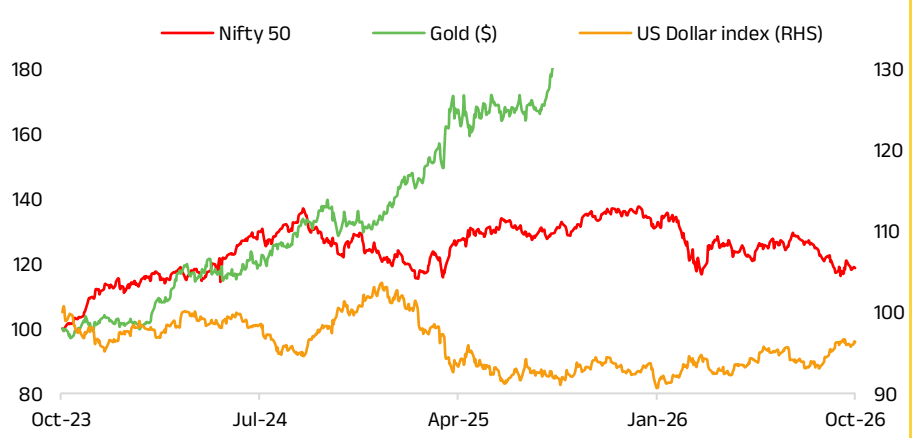
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-1.17	-3.00	-8.42	8.85
Flexi Cap Fund	-2.55	-0.53	-5.24	10.55
Mid Cap Fund	-4.05	-1.50	-2.47	14.02
Large & Mid Cap Fund	-2.99	-2.13	-5.43	11.91
Small Cap Fund	-4.85	5.64	3.31	13.16
Multi Cap Fund	-3.23	0.96	-2.36	12.42
Focused Fund	-2.30	-0.23	-4.73	10.75
Value Fund	-2.96	-3.95	-6.13	10.92
Contra Fund	-2.09	-3.50	-8.89	11.34
ELSS	-2.97	-2.42	-6.83	9.86
Equity Savings	-0.66	0.63	0.62	7.29
Arbitrage Fund	0.44	2.76	5.82	6.43
Dividend Yield Fund	-2.81	-4.40	-6.81	10.73
Aggressive Hybrid Fund	-1.87	-1.76	-4.96	9.28
Balanced Advantage	-1.52	-1.32	-3.80	7.59

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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