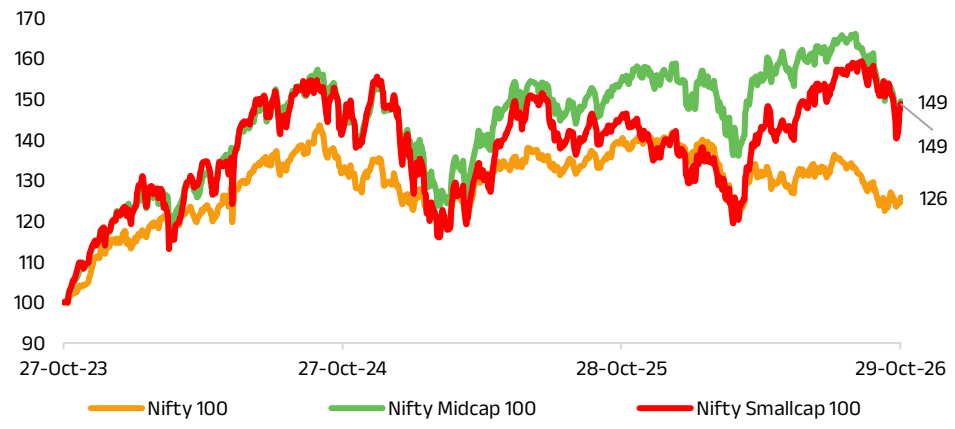
Daily Equity Market Pulse - October 30, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	29-Oct-26	1 Day	1 Week	1 Month
Nifty 50	22,936.75	1.05%	1.10%	0.97%
Nifty 100	23,899.15	1.08%	1.11%	0.43%
Nifty 200	13,176.05	1.06%	1.16%	-0.16%
Nifty 500	21,941.50	0.99%	1.13%	-0.72%
Nifty Large Midcap 250	15,588.60	0.97%	1.07%	-1.17%
Nifty Midcap 150	21,245.30	0.86%	1.03%	-2.78%
Nifty Next 50	68,121.60	1.22%	1.14%	-1.93%
Nifty Smallcap 250	17,101.10	0.66%	1.45%	-3.64%

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

Smart Beta Index

Index	29-Oct-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	28,723.25	0.88%	2.60%	-2.73%
NIFTY 500 Value 50	14,772.05	1.21%	0.41%	-3.04%
Nifty 200 Quality 30	18,930.75	0.85%	-0.10%	0.06%
Nifty 50 Equal Weight	31,041.95	1.02%	1.57%	-0.31%
NIFTY Alpha Low Volatility 30	24,908.25	0.75%	1.60%	-2.20%
Nifty High Beta 50	4,015.60	1.69%	0.83%	-3.81%
Nifty Low Volatility 50	23,125.95	1.10%	0.97%	-0.38%
Nifty Midcap150 Momentum 50	59,829.15	1.15%	3.15%	-1.98%
Nifty PSE	9,097.10	1.15%	0.69%	-2.64%
Nifty SME Emerge	14,408.15	1.10%	0.55%	-4.70%
Nifty 100 ESG	4,739.85	1.16%	1.10%	1.02%

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

Sector Indices

Index	29-Oct-26	1 Day	1 Week	1 Month
Nifty Auto	25,645.60	-0.24%	2.54%	-2.02%
Nifty Bank	54,909.65	1.18%	-0.03%	1.20%
Nifty Consumption	11,059.15	1.05%	2.84%	-0.87%
Nifty Financial	24,704.55	1.17%	0.19%	0.23%
Nifty FMCG	43,882.95	2.34%	1.80%	-2.03%
Nifty Healthcare	16,193.90	0.58%	4.37%	-2.23%
Nifty IT	31,866.40	0.99%	-0.67%	15.17%
Nifty Media	1,655.35	1.10%	4.47%	7.42%
Nifty Metal	11,848.45	0.67%	0.42%	-8.54%
Nifty MNC	28,529.45	0.24%	0.74%	-6.37%
Nifty Pharma	26,710.80	0.64%	4.35%	-0.83%
Nifty Realty	819.80	2.75%	2.03%	-1.68%
Nifty Energy	35,299.00	1.01%	0.56%	-3.32%

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

Nifty 50 Top 5 Gainers

Company	29-Oct-26	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,872.00	1,761.30	6.29	6.97
Power Grid	260.00	251.40	3.42	4.67
Wipro	190.10	184.50	3.04	-0.16
HUL	1,858.20	1,815.80	2.34	1.64
NTPC	310.50	303.75	2.22	2.61

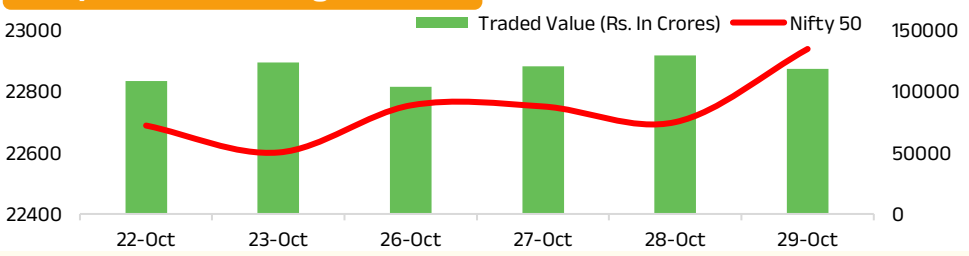
Source: NSE

Nifty 50 Top 5 Losers

Company	29-Oct-26	Prev_Day	% Change	1 Week
Hero Moto	5,105.00	5323	-4.09	-0.45
Maruti	11,426.00	11579	-1.32	2.29
Bajaj Auto	10,383.00	10485	-0.97	2.25
SBI Life Insurance Company Limited	1,652.00	1667	-0.88	0.55
Eicher Motors Limited	7,238.00	7300	-0.85	2.17

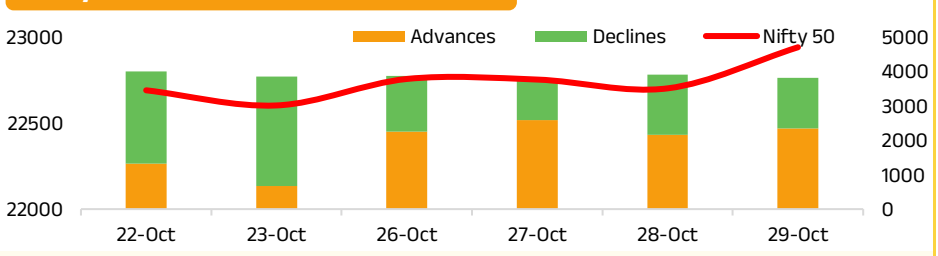
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

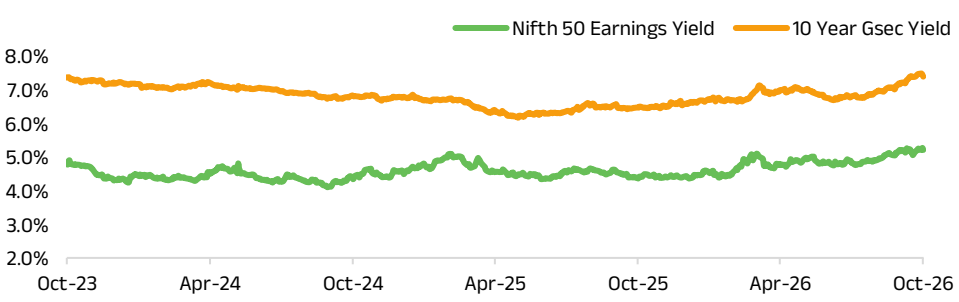
Indian equity markets rallied after the U.S. Federal Reserve kept interest rates unchanged at its Oct 2026 meeting, in line with market expectations, while easing crude oil prices following renewed diplomatic efforts to de-escalate tensions in the Middle East further supported sentiment.

Hero MotoCorp said it expects its operating profit margin to remain stable in the December quarter despite continued inflation in raw material costs. India's largest two-wheeler manufacturer plans to offset the pressure through cost savings, improved profitability in its electric scooter business, and selective price hikes.

JSW Energy reported a more than 38% YoY increase in consolidated net profit to Rs. 1,141 crore in the Sep quarter of FY27, driven by higher revenues. The company had posted a net profit of Rs. 824 crore in the corresponding quarter of the previous financial year.

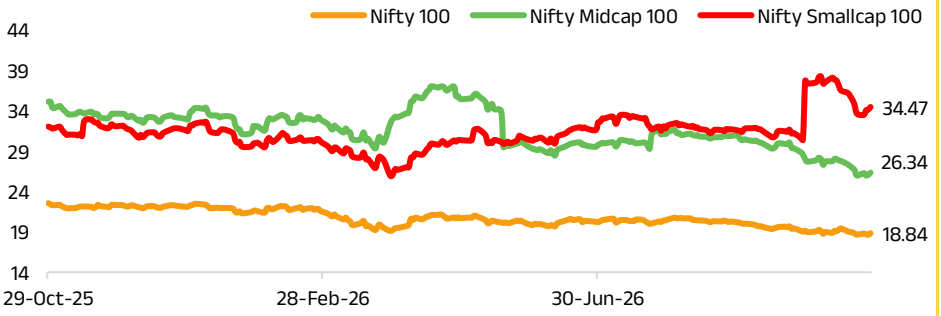
PVR INOX reported a more than two-fold increase in consolidated net profit to Rs. 263.1 crore in the Sep quarter of FY27, supported by strong box-office performance. The company had reported a net profit of Rs. 105.5 crore in the Jul-Sep quarter of the previous year.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



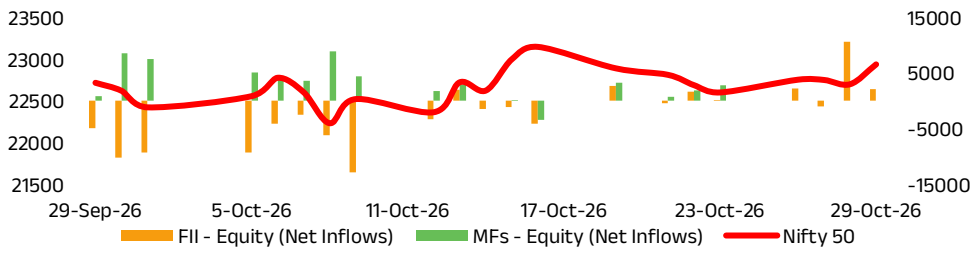
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	2124.48	-34,040	-34,040	-294,343
MF**	2802.33	43,787	43,787	454,775
DII	1924.41	63,038	63,038	696,327

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

Daily Equity Market Pulse - October 30, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	23047.40	22778.00	1.18%
Near Basis	110.65	79.15	39.80%
Mid Futures	23200.40	22928.80	1.18%
Mid Basis	263.65	229.95	14.66%
Near Open Interest (Cr.)	1.58	1.61	-1.47%
Mid Open Interest (Cr.)	0.12	0.13	-3.73%
Rollover (%)	7.61	7.58	0.44%
Put Call Ratio (OI)	1.31	1.07	22.00%
Put Call Ratio(Vol)	0.94	0.95	-1.09%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1961	4025	47115
Index Options	2047938	2063970	542566
Stock Futures	19280	20080	388464
Stock Options	21266	22900	32335
Total	2090445	2110975	1010480

Source: NSE

Global Equity Market

Global Indices	29-Oct-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4199.93	-0.23%	0.78%	0.79%
Nasdaq 100 (U.S.)	29402.51	-1.38%	1.53%	-3.09%
FTSE (U.K.)	10722.07	0.26%	-0.03%	0.80%
DAX Index (Germany)	26039.68	1.31%	2.63%	2.52%
CAC 40 Index (France)	7970.00	1.05%	2.03%	-0.82%
SSE Composite (China)	3651.43	-0.82%	-0.18%	-4.67%
Nikkei (Japan)	64659.47	1.10%	2.78%	-1.26%
Kospi (South Korea)	5937.66	-1.24%	7.30%	-13.58%
HangSeng (Hong Kong)	22958.65	-0.59%	0.10%	-6.38%
Strait Times (Singapore)	5396.03	-0.03%	-0.35%	-5.58%
Ibovespa Sao Paulo (Brazil)	169186.42	-1.06%	-17.11%	-7.96%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8891.80	0.50%	1.12%	2.10%
Jakarta Composite (Indonesia)	5098.06	-3.49%	-5.38%	-16.72%
KLSE (Malaysia)	1611.16	-0.17%	0.19%	-2.00%

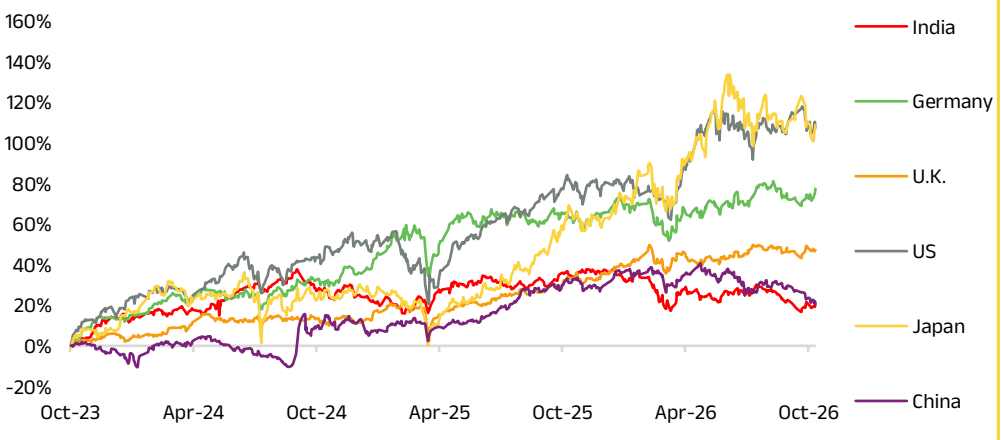
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	29-Oct-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	141,628	-0.44%	-0.83%	-3.61%
Gold ($/oz)	4,020.42	-1.15%	-0.09%	-3.84%
Silver (INR/1 kg)	190,401	-1.59%	-5.20%	-14.04%
Silver ($/oz)	52.38	-2.95%	-3.92%	-14.75%
Brent Crude($/bbl)	137.98	-5.18%	-1.27%	1.70%
Crude Oil (INR/1 bbl)	9,788.00	2.96%	6.37%	10.14%
NYMEX Crude($/bbl)	105.41	-0.70%	1.19%	16.63%
Natural Gas (INR/1 mmbtu)	288.70	12.47%	9.23%	-3.15%
Aluminium (INR/1 kg)	332.30	-0.60%	2.04%	-5.14%
Copper (INR/1 kg)	1,412.00	0.00%	2.06%	-1.59%
Nickel (INR/1 kg)	1,528.80	-0.78%	-0.73%	-3.80%
Lead (INR/1 kg)	198.05	0.48%	-0.73%	-0.40%
Zinc (INR/1 kg)	434.00	-0.85%	-0.56%	1.20%
Mentha Oil (INR/1 kg)	1,427.80	0.73%	3.13%	4.39%
Baltic Dry Index	2,712	2.26%	0.71%	-14.66%

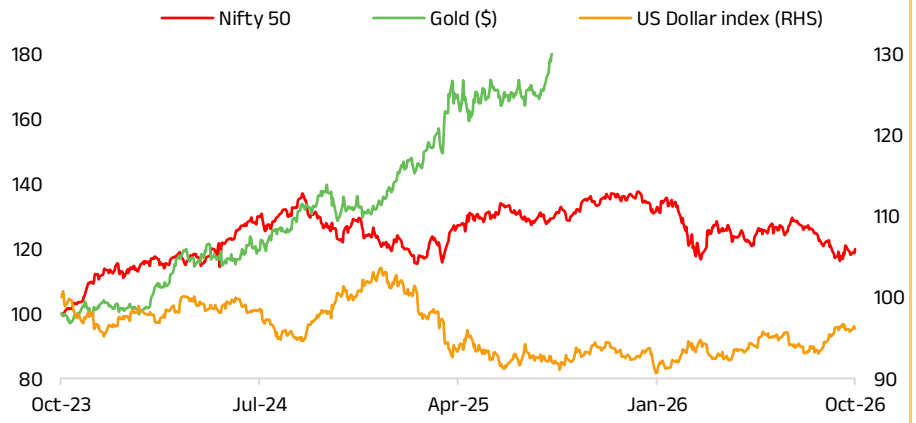
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	0.18	-2.52	-7.96	9.21
Flexi Cap Fund	-1.39	-0.06	-4.73	10.83
Mid Cap Fund	-2.63	-0.66	-2.13	14.30
Large & Mid Cap Fund	-1.60	-1.44	-4.99	12.21
Small Cap Fund	-4.24	5.80	3.49	13.35
Multi Cap Fund	-2.15	1.32	-2.00	12.71
Focused Fund	-0.98	0.43	-4.28	11.10
Value Fund	-1.83	-3.58	-5.90	11.20
Contra Fund	-0.99	-3.25	-8.84	11.55
ELSS	-1.80	-2.04	-6.42	10.15
Equity Savings	-0.16	0.73	0.76	7.38
Arbitrage Fund	0.60	2.62	5.76	6.39
Dividend Yield Fund	-1.65	-4.23	-6.78	10.96
Aggressive Hybrid Fund	-0.86	-1.28	-4.63	9.55
Balanced Advantage	-0.60	-0.92	-3.48	7.83

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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