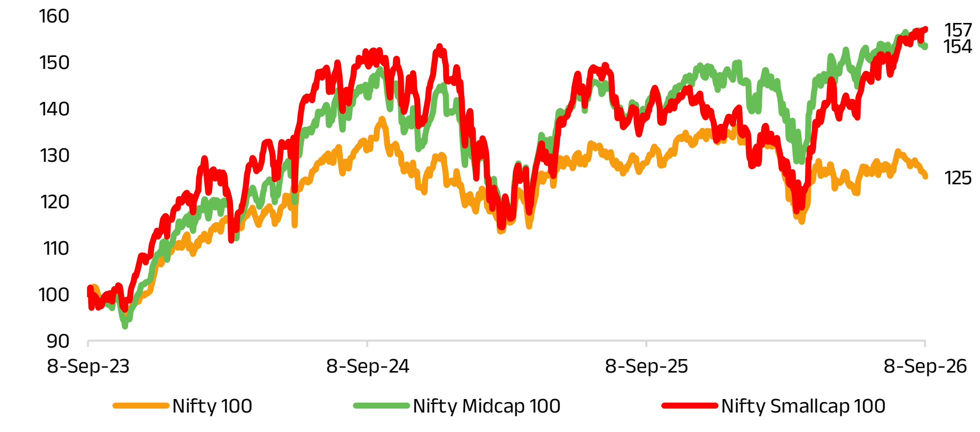
Daily Equity Market Pulse - September 09, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	8-Sep-26	1 Day	1 Week	1 Month
Nifty 50	23,635.10	-0.61%	-1.75%	-3.81%
Nifty 100	24,803.90	-0.40%	-1.41%	-3.53%
Nifty 200	13,804.10	-0.27%	-1.25%	-3.00%
Nifty 500	23,106.10	-0.22%	-1.00%	-2.56%
Nifty Large Midcap 250	16,554.35	-0.13%	-1.05%	-2.35%
Nifty Midcap 150	23,089.95	0.12%	-0.70%	-1.17%
Nifty Next 50	72,950.65	0.52%	0.10%	-2.34%
Nifty Smallcap 250	18,527.20	0.23%	0.89%	0.93%

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

Smart Beta Index

Index	8-Sep-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,971.80	0.89%	0.70%	-0.22%
NIFTY 500 Value 50	15,882.55	-0.09%	-0.06%	-3.45%
Nifty 200 Quality 30	20,122.15	0.49%	-2.05%	-4.27%
Nifty 50 Equal Weight	32,293.40	-0.26%	-1.65%	-4.16%
NIFTY Alpha Low Volatility 30	26,521.00	-0.05%	-1.55%	-4.11%
Nifty High Beta 50	4,433.80	-0.16%	0.59%	-1.69%
Nifty Low Volatility 50	24,060.45	-0.12%	-1.91%	-4.55%
Nifty Midcap150 Momentum 50	64,047.55	0.81%	0.15%	0.39%
Nifty PSE	9,709.35	0.30%	0.52%	-2.15%
Nifty SME Emerge	14,894.65	0.63%	2.22%	4.49%
Nifty 100 ESG	4,907.90	-0.26%	-1.73%	-4.37%

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

Sector Indices

Index	8-Sep-26	1 Day	1 Week	1 Month
Nifty Auto	27,775.35	0.28%	-2.51%	-6.32%
Nifty Bank	56,777.55	-0.54%	-1.10%	-1.68%
Nifty Consumption	11,569.35	0.07%	-1.81%	-5.15%
Nifty Financial	25,695.55	-0.93%	-1.19%	-2.91%
Nifty FMCG	45,749.85	0.35%	-1.52%	-7.45%
Nifty Healthcare	16,624.60	0.63%	-0.27%	-0.50%
Nifty IT	29,883.45	-0.37%	-5.12%	-5.28%
Nifty Media	1,540.60	1.31%	-1.34%	-0.92%
Nifty Metal	13,155.95	0.02%	-0.26%	-0.26%
Nifty MNC	32,065.80	0.09%	-1.38%	-4.87%
Nifty Pharma	26,880.80	0.77%	0.33%	1.28%
Nifty Realty	892.05	-0.05%	0.08%	0.69%
Nifty Energy	38,093.50	0.32%	0.76%	-1.69%

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

Nifty 50 Top 5 Gainers

Company	8-Sep-26	Prev_Day	% Change	1 Week
Divi's Lab	9,575.00	9,315.00	2.79	4.47
Hero Moto	5,333.50	5,270.00	1.20	-3.99
HUL	1,980.00	1,960.00	1.02	-0.74
ONGC	236.00	233.70	0.98	-0.19
Eicher Motors Limited	7,747.50	7,672.00	0.98	-2.79

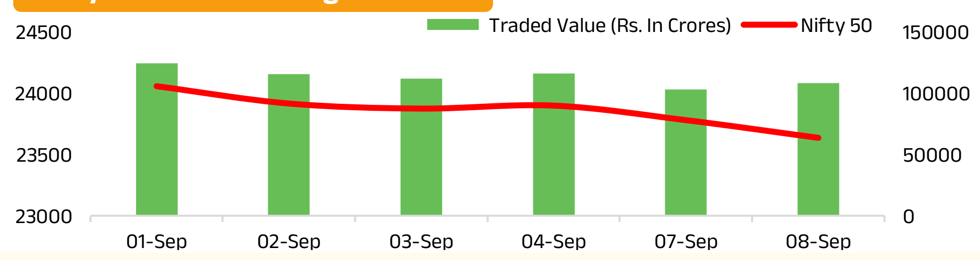
Source: NSE

Nifty 50 Top 5 Losers

Company	8-Sep-26	Prev_Day	% Change	1 Week
BPCL	303.85	313	-2.89	-4.34
SBI Life Insurance Comp	1,696.60	1732	-2.04	-2.46
ICICI Bank	1,399.40	1428	-1.97	-2.68
Axis Bank	1,244.90	1266	-1.67	-1.04
Ultratech Cem	11,009.00	11175	-1.49	-3.43

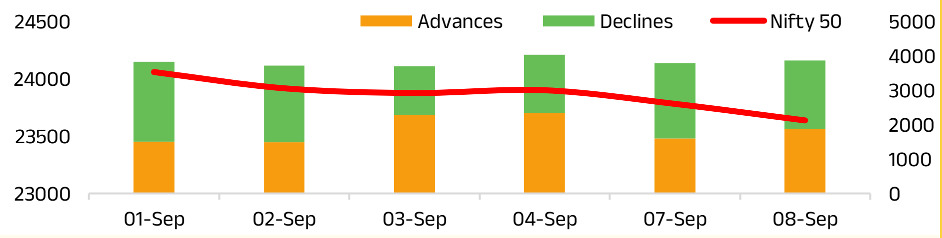
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

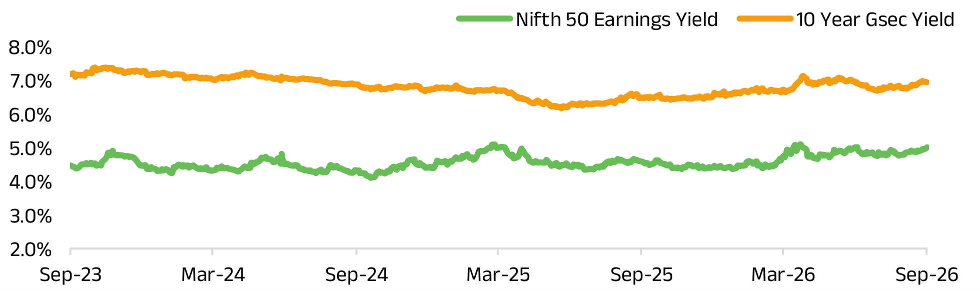
Indian equity markets fell as rising crude oil prices amid escalating Middle East tensions fuelled concerns over a potential interest-rate hike by the U.S. Federal Reserve. Crude oil prices rose after Iran threatened to retaliate against any new U.S. attacks on its assets, while the Saudi-led coalition vowed a resolute response to a wave of attacks by Houthi rebels.

STL unveiled its Lakshya growth strategy, targeting revenue of Rs. 20,000 crore by FY29. The plan focuses on scaling core telecom and digital infrastructure businesses, expanding global presence, and improving operational efficiency. Management indicated that growth investments and execution initiatives will support the medium-term expansion roadmap.

TCS has secured responsibility for the next phase of a technology modernization program for the Odisha government. The project is expected to enhance digital governance capabilities, improve service delivery, and strengthen public sector technology infrastructure. The engagement reinforces TCS's presence in large government digital transformation initiatives.

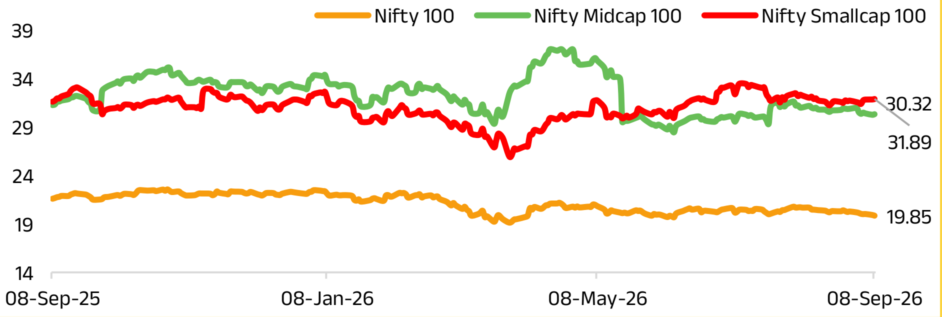
Mahindra is aiming to capture more than 50% of the small pickup vehicle segment by FY27. The company is banking on its Veero platform and product expansion strategy to strengthen its position in the commercial vehicle market. The initiative reflects continued focus on market share gains and portfolio growth.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



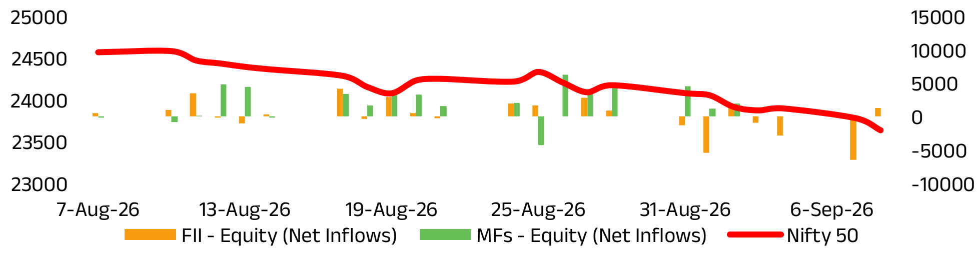
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1280.49	-12,612	37,218	-237,055
MF**	1912.98	3,142	71,719	366,163
DII	1349.64	20,484	113,851	577,743

Source: SEBI, NSDL;**As on 2nd Sep 2026;

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ADITYA BIRLA CAPITAL
MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	23749.60	23867.70	-0.49%
Near Basis	114.50	88.55	29.31%
Mid Futures	23850.60	23975.80	-0.52%
Mid Basis	215.50	196.65	9.59%
Near Open Interest (Cr.)	1.78	1.75	1.56%
Mid Open Interest (Cr.)	0.22	0.20	13.43%
Rollover (%)	13.90	12.45	11.64%
Put Call Ratio (OI)	0.72	0.69	3.86%
Put Call Ratio(Vol)	0.96	1.01	-5.50%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1480	3754	51366
Index Options	1338443	1326904	590069
Stock Futures	11727	13361	420003
Stock Options	28428	27925	58681
Total	1380077	1371945	1120120

Source: NSE

Global Equity Market

Global Indices	8-Sep-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4178.83	-0.61%	0.58%	-1.16%
Nasdaq 100 (U.S.)	29507.70	-0.12%	1.48%	-0.72%
FTSE (U.K.)	10811.66	-0.10%	0.21%	-0.82%
DAX Index (Germany)	26007.63	0.00%	0.14%	-1.18%
CAC 40 Index (France)	8317.98	0.14%	0.19%	-4.55%
SSE Composite (China)	3940.55	0.20%	-0.99%	0.01%
Nikkei (Japan)	65269.33	-1.70%	-1.43%	-0.51%
Kospi (South Korea)	6954.52	-0.58%	1.74%	11.12%
HangSeng (Hong Kong)	25317.18	-0.38%	-0.05%	-1.37%
Strait Times (Singapore)	5767.45	-0.43%	1.00%	1.21%
Ibovespa Sao Paulo (Brazil)	187366.84	1.20%	4.25%	8.61%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8920.80	-1.00%	-1.61%	-3.70%
Jakarta Composite (Indonesia)	6686.44	1.01%	1.31%	4.32%
KLSE (Malaysia)	1714.40	-0.02%	0.82%	-1.23%

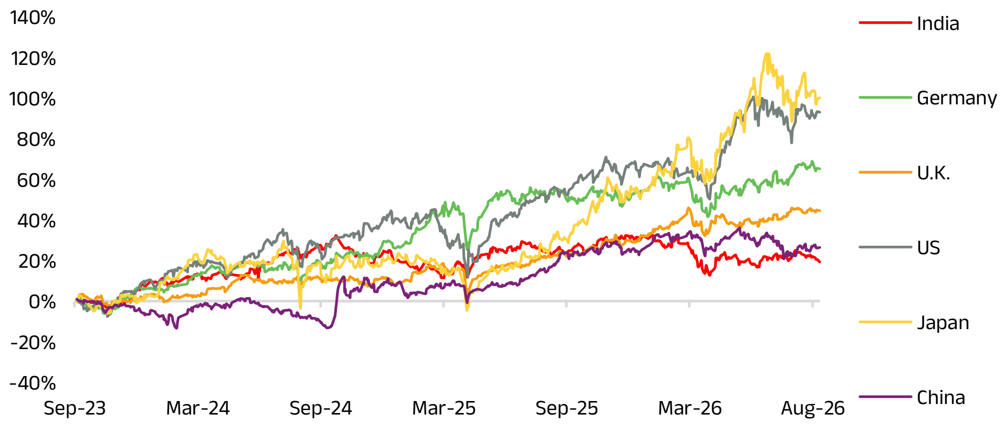
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	8-Sep-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	152,487	0.26%	-0.20%	2.21%
Gold ($/oz)	4,401.14	-0.08%	1.68%	1.37%
Silver (INR/1 kg)	233,698	0.69%	1.12%	0.65%
Silver ($/oz)	66.25	0.17%	3.12%	4.25%
Brent Crude($/bbl)	108.56	2.51%	14.21%	16.62%
Crude Oil (INR/1 bbl)	8,644.00	0.00%	5.59%	17.48%
NYMEX Crude($/bbl)[2]	92.59	0.15%	1.32%	16.36%
Natural Gas (INR/1 mmbtu)	281.10	0.00%	0.36%	11.86%
Aluminium (INR/1 kg)	352.70	0.69%	1.83%	-0.25%
Copper (INR/1 kg)	1,433.50	1.02%	1.27%	2.66%
Nickel (INR/1 kg)	1,618.50	-0.40%	-0.61%	-2.02%
Lead (INR/1 kg)	203.65	0.82%	1.02%	-2.75%
Zinc (INR/1 kg)	434.95	0.96%	1.39%	9.55%
Mentha Oil (INR/1 kg)	1,350.00	-0.37%	0.45%	1.40%
Baltic Dry Index[1]	3,575	-1.46%	13.24%	15.73%

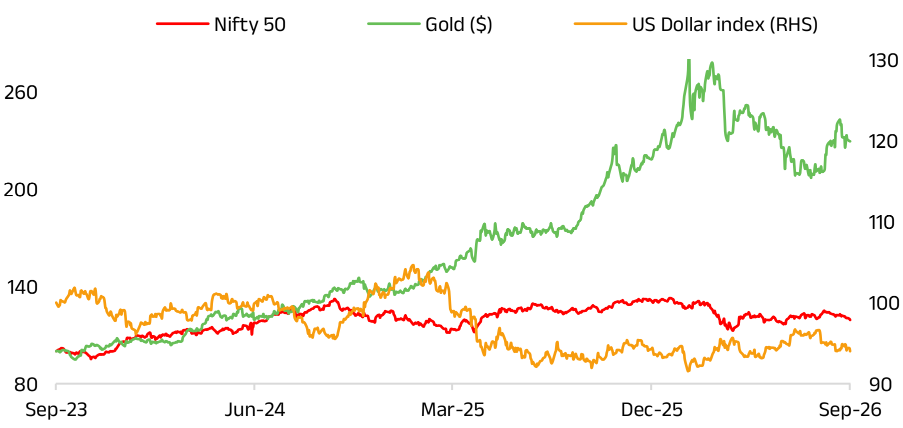
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	-2.68	1.11	-0.52	9.18
Flexi Cap Fund	-1.21	7.39	3.77	11.32
Mid Cap Fund	-0.02	11.92	9.22	15.60
Large & Mid Cap Fund	-1.06	7.29	4.86	12.97
Small Cap Fund	2.44	23.81	14.70	15.18
Multi Cap Fund	0.02	11.69	7.68	13.45
Focused Fund	-1.34	7.44	4.83	11.46
Value Fund	-1.79	4.48	4.48	12.01
Contra Fund	-0.99	2.10	0.47	12.43
ELSS	--	--	--	--
Equity Savings	-0.29	2.96	4.15	7.64
Arbitrage Fund	0.41	2.79	5.85	6.52
Dividend Yield Fund	-2.20	2.14	3.06	11.81
Aggressive Hybrid Fund	-1.34	4.03	2.62	9.94
Balanced Advantage	-1.14	3.04	2.45	8.29

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.

[1]Data as on 07 Sep,