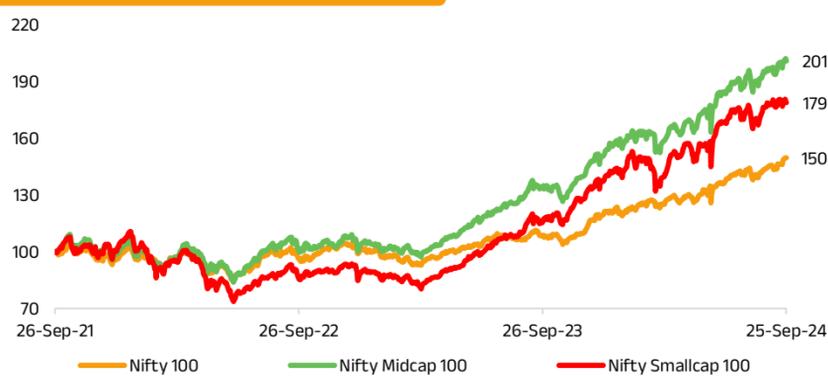


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	25-Sep-24	1 Day	1 Week	1 Month
Nifty 50	26,004.15	0.25%	2.47%	4.76%
Nifty 100	27,051.65	0.09%	2.39%	4.42%
Nifty 200	14,696.00	-0.03%	2.19%	4.23%
Nifty 500	24,371.25	-0.08%	1.98%	4.07%
Nifty Large Midcap 250	16,977.45	-0.26%	1.82%	3.86%
Nifty Midcap 150	22,357.40	-0.61%	1.26%	3.29%
Nifty Next 50	76,517.40	-0.37%	2.11%	2.84%
Nifty Smallcap 250	18,518.10	-0.35%	0.23%	2.84%

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

## Smart Beta Index

Index	25-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	37,479.65	-0.17%	2.97%	2.53%
NIFTY 500 Value 50	15,150.09	0.43%	2.44%	-0.27%
Nifty 200 Quality 30	23,240.30	-0.55%	0.90%	3.34%
Nifty 50 Equal Weight	33,204.00	0.04%	1.86%	4.16%
NIFTY Alpha Low Volatility 30	31,082.90	0.17%	2.44%	3.96%
Nifty High Beta 50	4,115.30	-0.30%	1.46%	-0.91%
Nifty Low Volatility 50	26,368.80	0.02%	1.84%	4.58%
Nifty Midcap150 Momentum 50	67,688.40	-0.89%	1.35%	3.93%
Nifty PSE	11,112.75	0.54%	2.82%	-1.86%
Nifty SME Emerge	16,280.38	0.42%	1.73%	2.51%
Nifty 100 ESG	5,197.35	-0.12%	1.71%	4.51%

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

## Sector Indices

Index	25-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	26,888.35	-0.12%	4.20%	4.01%
Nifty Bank	54,101.65	0.25%	2.56%	6.22%
Nifty Consumption	12,890.70	-0.44%	3.36%	7.53%
Nifty Financial	24,987.75	0.42%	2.72%	7.56%
Nifty FMCG	65,521.70	-0.42%	1.40%	3.33%
Nifty Healthcare	14,674.50	-0.07%	0.98%	4.07%
Nifty IT	41,960.95	-0.67%	-0.30%	2.12%
Nifty Media	2,139.25	2.94%	1.50%	3.40%
Nifty Metal	9,777.15	0.43%	5.01%	5.24%
Nifty MNC	32,167.10	-0.04%	3.16%	4.08%
Nifty Pharma	23,249.00	0.26%	0.97%	3.20%
Nifty Realty	1,130.15	0.66%	6.24%	11.01%
Nifty Energy	44,064.70	0.82%	4.05%	1.68%

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

## Nifty 50 Top 5 Gainers

Company	25-Sep-24	Prev_Day	% Change	1 Week
Power Grid	363.75	350.05	3.91	8.81
Axis Bank	1,268.10	1,239.55	2.30	2.23
NTPC	436.10	428.10	1.87	5.30
Grasim Indus	2,662.00	2,619.30	1.63	-2.23
Bajaj Finance	7,623.90	7,554.20	0.92	-0.09

Source: NSE

## Nifty 50 Top 5 Losers

Company	25-Sep-24	Prev_Day	% Change	1 Week
Tech Mahindra	1,602.75	1637	-2.10	-0.17
Tata Beverages	1,189.60	1212	-1.82	-0.94
Tata Motors	963.60	977	-1.40	0.16
Titan industries limited	3,737.25	3785	-1.26	0.32
Kotak Bank	1,897.95	1915	-0.87	3.17

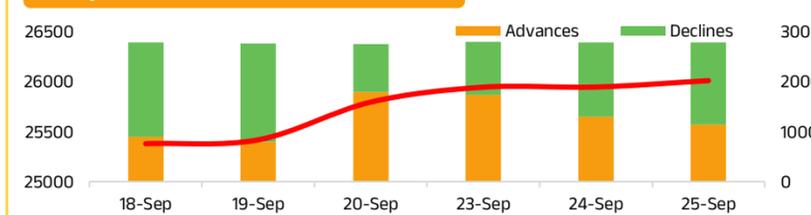
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

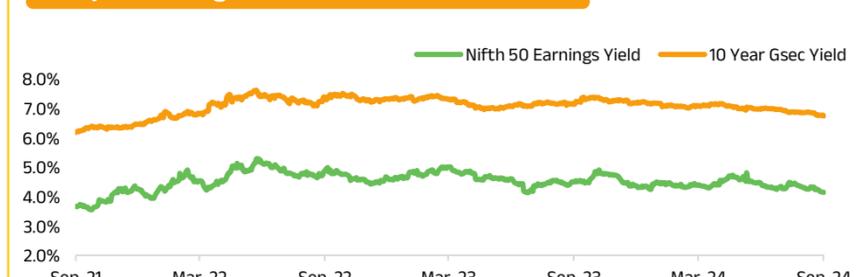
Indian equity markets rebounded from the day's lows and closed at record highs. After witnessing a range-bound trading session throughout the day, the key benchmark indices closed near fresh highs, recovering at the fag end of trade from intraday lows, led by power and banking sectors.

Adani Green Energy and Adani Energy Solutions have become members of the Utilities for Net Zero Alliance. UNEZA, was formed during COP28 following the endorsement of the UAE Declaration of Action.

Vedanta Ltd announced that its board is scheduled to convene on Oct 8, 2024, to evaluate and potentially approve the fourth interim dividend for the FY25. The company stated in an exchange filing that the record date to establish the eligibility of equity shareholders for the fourth dividend, if approved, will be set for Oct 16, 2024.

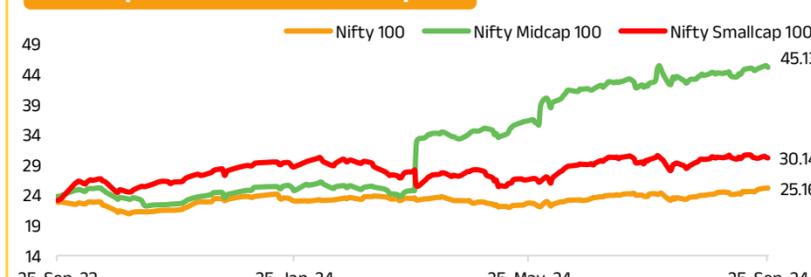
Foxconn is considering an investment of around \$1 billion to create a smartphone display module assembly plant in Tamil Nadu, according to a report. This would be Foxconn's first facility of this kind in India, mainly to support Apple in making iPhones.

## 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

## FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

## Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	-1454.09	49,459	89,144	92,344
MF**	1999.75	15,140	67,427	258,853
DII	1778.99	15,923	87,687	323,814

Source: SEBI, NSDL;\*\*As on 23rd Sep 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	25998.20	25944.70	0.21%
Near Basis	-5.95	4.30	-238.37%
Mid Futures	26126.70	26081.30	0.17%
Mid Basis	122.55	140.95	-13.05%
Near Open Interest (Cr.)	0.67	0.90	-24.97%
Mid Open Interest (Cr.)	1.14	0.94	22.15%
Rollover (%)	64.59	52.97	21.93%
Put Call Ratio (OI)	1.33	1.31	0.97%
Put Call Ratio(Vol)	1.01	1.00	0.27%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	10767	12250	51481
Index Options	2993656	3019814	600832
Stock Futures	133305	130072	353492
Stock Options	55181	52409	65037
Total	3192909	3214545	1070842

Source: NSE

## Global Equity Market

Global Indices	25-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3123.22	-0.24%	1.79%	1.56%
Nasdaq 100 (U.S.)	19972.61	0.14%	3.25%	1.28%
FTSE (U.K.)	8268.70	-0.17%	0.18%	-0.71%
DAX Index (Germany)	18918.50	-0.41%	1.11%	1.53%
CAC 40 Index (France)	7565.62	-0.50%	1.62%	-0.15%
SSE Composite (China)	2896.31	1.16%	6.59%	1.47%
Nikkei (Japan)	37870.26	-0.19%	4.10%	-1.29%
Kospi (South Korea)	2596.32	-1.34%	0.81%	-3.90%
HangSeng (Hong Kong)	19129.10	0.68%	8.32%	8.61%
Strait Times (Singapore)	3583.27	-1.09%	-0.25%	5.76%
Ibovespa Sao Paulo (Brazil)	131586.45	-0.43%	-1.62%	-2.97%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8126.40	-0.19%	-0.19%	1.28%
Jakarta Composite (Indonesia)	7740.90	-0.48%	-1.13%	2.61%
KLSE (Malaysia)	1673.38	0.18%	0.77%	2.30%

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

## Global & Domestic Commodity Market

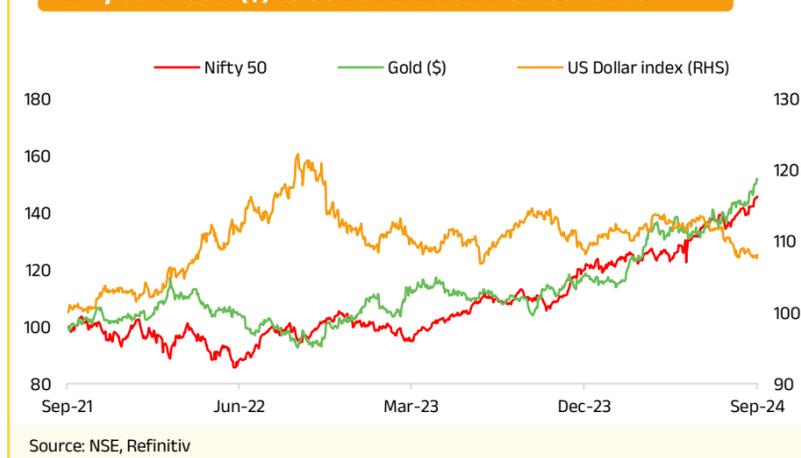
Commodity Prices	25-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	75,029	0.72%	2.98%	5.53%
Gold (\$/oz)	2,656.82	0.00%	3.83%	5.76%
Silver (INR/1 kg)	90,489	2.40%	3.78%	7.43%
Silver (\$/oz)	31.84	-0.89%	5.94%	6.80%
Brent Crude(\$/bbl)	76.66	0.14%	-0.13%	-7.10%
Crude Oil (INR/1 bbl)	5,985.00	1.84%	0.28%	-2.37%
NYMEX Crude(\$/bbl)	70.17	-2.66%	-2.23%	-7.33%
Natural Gas (INR/1 mmbtu)	213.30	-2.25%	9.50%	23.72%
Aluminium (INR/1 kg)	233.50	-0.21%	0.65%	1.81%
Copper (INR/1 kg)	840.00	0.93%	3.51%	5.00%
Nickel (INR/1 kg)	1,404.20	-0.07%	2.32%	-0.99%
Lead (INR/1 kg)	196.00	0.18%	1.48%	1.29%
Zinc (INR/1 kg)	276.50	0.55%	2.45%	1.62%
Mentha Oil (INR/1 kg)	981.60	-1.23%	-0.69%	-2.50%
Baltic Dry Index <sup>[1]</sup>	2,014	0.75%	6.56%	14.30%

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

## Comparative Performance of Major Global Equity Market



## Nifty 50 vs Gold (\$) vs US Dollar Index - Rebase to 100



## Term of the Day



### Relative Strength Index

Definition: Relative Strength Index (RSI) is a very popular indicator used in technical analysis. Such an indicator takes into account the change in price movements of a particular stock and compares its recent gains to recent losses for a predefined time period to ascertain whether the concerned stock is overbought or oversold. The value of RSI always ranges from 0 to 100.



### Explanation

It needs to be noted that RSI does not measure the relative strength of a stock. Instead, RSI measures the internal strength of a stock based on its past performance. The calculation of RSI is a two-step process. At the onset, one needs to define a specific time period, which may be, say a 14-day time period. Suppose the stock went up on nine days and fell on four days. In that case, the average gains and average losses for the stock need to be calculated. Now an average gain for the 14-day period can be found out by summing up the absolute gains (stock's closing price on a given day — closing price on the previous day) on each of these nine days and dividing it by 14.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	4.25	20.55	39.43	15.63
Mid Cap Fund	3.66	30.99	51.54	23.91
Large & Mid Cap Fund	3.92	26.35	46.82	20.26
Small Cap Fund	3.00	30.77	48.40	24.86
Multi Cap Fund	3.81	26.59	46.91	21.39
Focused Fund	4.54	24.06	43.18	17.64
Value Fund	3.16	23.83	48.57	22.30
Contra Fund	4.18	26.87	51.53	24.53
ELSS	3.77	24.31	42.72	19.55
Equity Savings	1.60	9.36	16.93	9.26
Arbitrage Fund	0.51	3.72	7.39	5.74
Dividend Yield Fund	2.75	24.16	48.59	22.87
Aggressive Hybrid Fund	3.29	19.00	34.27	15.21
Balanced Advantage	2.20	13.38	26.25	12.60

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.

<sup>[1]</sup> Data as on 24 Sep, 2024

### 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.**