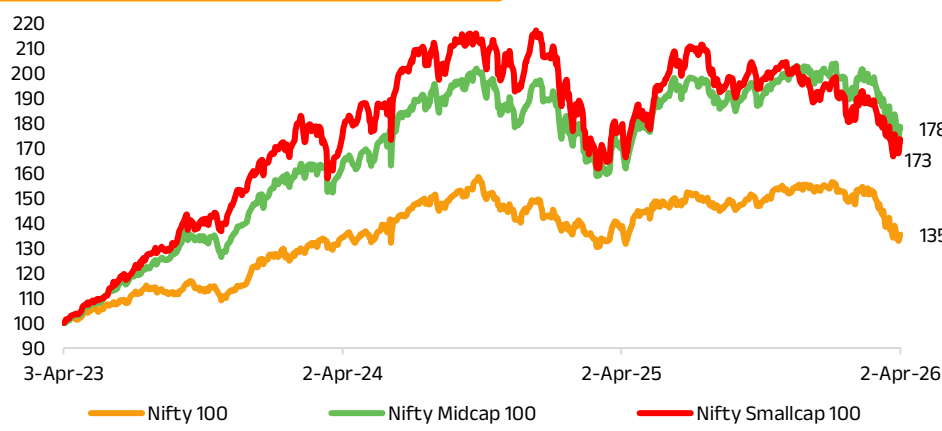


Broad Indices Historical Movement



Source: NSE

Broad Indices

	2-Apr-26	1 Day	1 Week	1 Month
Nifty 50	22,713.10	0.15%	-0.47%	-8.66%
Nifty 100	23,304.20	0.14%	-0.41%	-8.84%
Nifty 200	12,728.00	0.06%	-0.48%	-8.64%
Nifty 500	20,938.35	0.02%	-0.39%	-8.31%
Nifty Large Midcap 250	14,851.55	-0.09%	-0.57%	-8.30%
Nifty Midcap 150	19,805.50	-0.32%	-0.74%	-7.78%
Nifty Next 50	61,957.60	0.07%	-0.14%	-9.75%
Nifty Smallcap 250	14,724.45	-0.17%	0.47%	-5.49%

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

Smart Beta Index

Index	2-Apr-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	27,620.65	-0.53%	-1.16%	-10.46%
NIFTY 500 Value 50	15,176.55	-0.29%	0.39%	-8.68%
Nifty 200 Quality 30	18,722.35	0.45%	0.79%	-6.12%
Nifty 50 Equal Weight	30,005.45	0.00%	-0.51%	-8.21%
NIFTY Alpha Low Volatility 30	24,073.65	-0.37%	-2.11%	-10.49%
Nifty High Beta 50	3,458.95	0.06%	0.76%	-6.63%
Nifty Low Volatility 50	22,779.25	-0.06%	-1.15%	-8.44%
Nifty Midcap150 Momentum 50	55,507.00	-0.50%	-1.13%	-8.68%
Nifty PSE	9,666.90	-0.34%	-0.10%	-6.64%
Nifty SME Emerge	11,950.20	2.44%	4.62%	-3.67%
Nifty 100 ESG	4,542.60	0.38%	-0.23%	-8.51%

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

Sector Indices

Index	2-Apr-26	1 Day	1 Week	1 Month
Nifty Auto	24,089.65	-0.62%	-1.08%	-12.53%
Nifty Bank	51,548.75	0.19%	-1.39%	-13.86%
Nifty Consumption	10,527.25	-0.17%	-0.30%	-7.27%
Nifty Financial	24,041.55	0.25%	-1.36%	-12.78%
Nifty FMCG	46,232.15	0.21%	-0.42%	-8.91%
Nifty Healthcare	13,934.35	-0.86%	-3.46%	-6.21%
Nifty IT	30,441.45	2.60%	3.05%	0.56%
Nifty Media	1,303.35	-0.39%	0.71%	-6.26%
Nifty Metal	11,456.60	0.39%	2.64%	-6.63%
Nifty MNC	28,367.40	0.34%	0.11%	-9.47%
Nifty Pharma	21,808.40	-0.92%	-3.36%	-5.00%
Nifty Realty	672.10	1.07%	0.29%	-12.49%
Nifty Energy	35,299.40	-0.29%	0.24%	-3.17%

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

Nifty 50 Top 5 Gainers

Company	2-Apr-26	Prev_Day	% Change	1 Week
HCL Tech	1,402.20	1,354.40	3.53	2.77
Tech Mahindra	1,441.50	1,404.50	2.63	3.59
Infosys	1,300.80	1,275.70	1.97	2.45
Wipro	194.91	191.18	1.95	1.73
Tata Beverages	1,042.00	1,023.80	1.78	-0.62

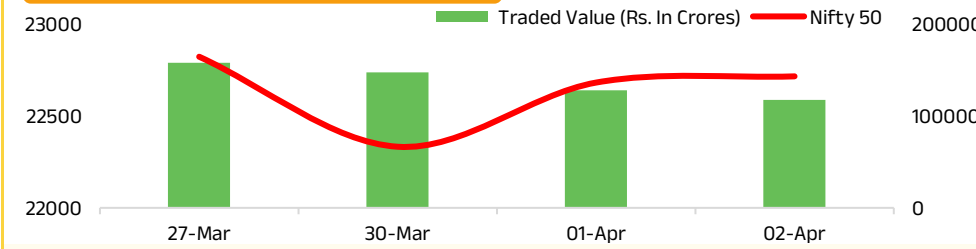
Source: NSE

Nifty 50 Top 5 Losers

Company	2-Apr-26	Prev_Day	% Change	1 Week
Eicher Motors Limited	6,649.50	6826	-2.58	-2.38
Asian Paints	2,169.00	2226	-2.55	-1.74
Hero Moto	5,011.50	5122	-2.16	-2.56
Sun Pharma	1,693.60	1729	-2.02	-5.58
Bajaj Auto	8,758.50	8896	-1.54	-1.60

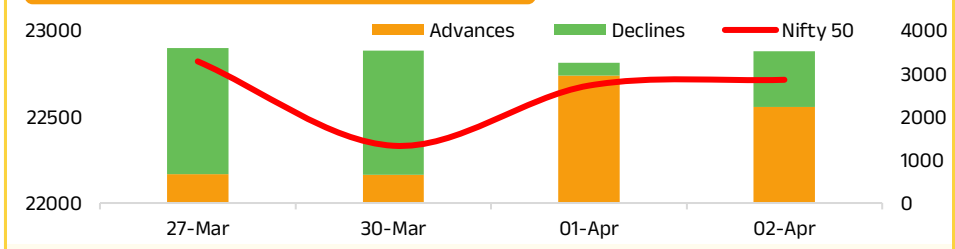
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

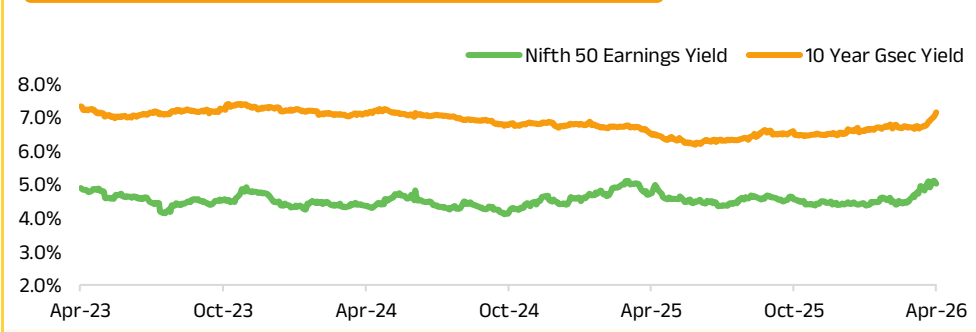
Indian equity markets opened on a weak note after the U.S. President's address to the nation on the ongoing conflict in the Middle East dampened expectations of a near-term resolution. However, strong buying interest emerged in the latter half of the session, driving a sharp recovery and helping the key benchmark indices erase intraday losses to close in positive territory.

Tata Power said it has resumed operations at the Mundra plant, which has an installed capacity of 4,150 MW, after a gap of nearly nine months. The company had suspended operations at all units of the Mundra plant on July 2, 2025, and had been incurring losses due to the temporary closure.

Jubilant FoodWorks announced that it has renewed its master franchise agreement to operate Domino's stores in India for a further 15-year term.

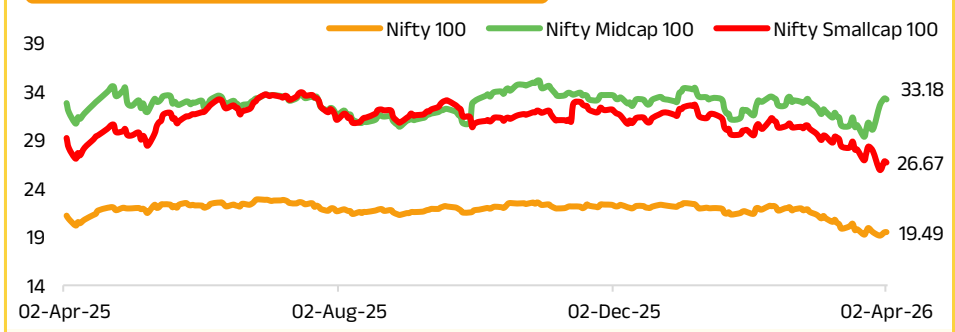
Nvidia Corp's market capitalization is rapidly converging with that of India's entire equity market, underscoring the speed of the ongoing artificial intelligence (AI) boom. A year ago, the AI chipmaker's valuation was less than half of India's total market capitalization. Since then, a sharp rally—driven by record-breaking earnings and unprecedented demand for its chips—has propelled Nvidia's valuation to levels comparable with the combined market capitalization of more than 4,000 listed Indian companies.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



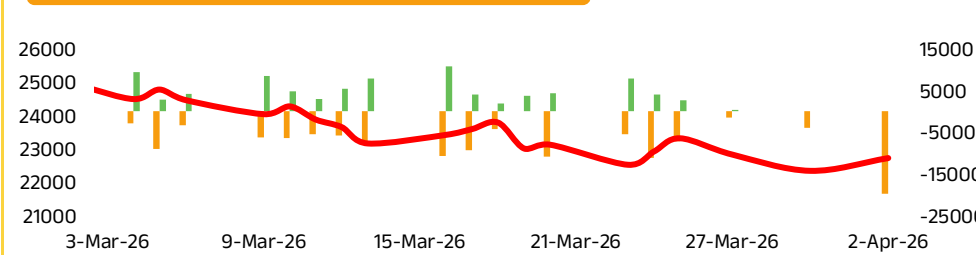
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

PE Comparison across Market cap



Source: NSE

FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

Institutional Flows (Equity)

Description	Net	MTD	QTD	INR Cr.
				YTD
FII*	-19837.23	-19,837	-19,837	-150,959
MF**	217.67	NA	NA	143,702
DII*	7208.41	14,380	14,380	261,706

Source: SEBI, NSDL; *As on 2nd Apr 2026; **As on 27th Mar 2026;

F&O Trends

	Latest	Previous	Change %
Near Futures	22766.60	22766.60	0.00%
Near Basis	53.50	53.50	0.00%
Mid Futures	22904.20	22904.20	0.00%
Mid Basis	191.10	191.10	0.00%
Near Open Interest (Cr.)	2.14	2.14	0.00%
Mid Open Interest (Cr.)	0.20	0.20	0.00%
Rollover (%)	10.16	10.16	0.00%
Put Call Ratio (OI)	1.09	0.93	17.47%
Put Call Ratio(Vol)	0.84	0.92	-8.23%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	5099	5177	58559
Index Options	1459863	1460217	373782
Stock Futures	23167	19968	425484
Stock Options	10278	10369	18535
Total	1498406	1495730	876360

Source: NSE

Global Equity Market

Global Indices	3-Apr-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.) ^[1]	3595.46	0.13%	3.37%	-3.43%
Nasdaq 100 (U.S.) ^[1]	24045.53	0.11%	3.95%	-2.73%
FTSE (U.K.) ^[1]	10436.29	0.69%	4.70%	-0.46%
DAX Index (Germany) ^[1]	23168.08	-0.56%	3.89%	-2.62%
CAC 40 Index (France) ^[1]	7962.39	-0.24%	3.38%	-1.75%
SSE Composite (China)	3880.10	-1.00%	-0.86%	-5.88%
Nikkei (Japan)	53123.49	1.26%	-0.47%	-5.61%
Kospi (South Korea)	5377.30	2.74%	-1.13%	-7.16%
HangSeng (Hong Kong) ^[1]	25116.53	-0.70%	0.66%	-2.53%
Strait Times (Singapore) ^[1]	4947.50	-0.57%	1.01%	0.63%
Ibovespa Sao Paulo (Brazil) ^[1]	188052.02	0.05%	3.58%	2.70%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia) ^[1]	8579.50	-1.06%	0.74%	-5.48%
Jakarta Composite (Indonesia) ^[1]	7026.78	-2.19%	-0.99%	-11.50%
KLSE (Malaysia)	1695.50	-0.16%	-1.00%	-0.96%

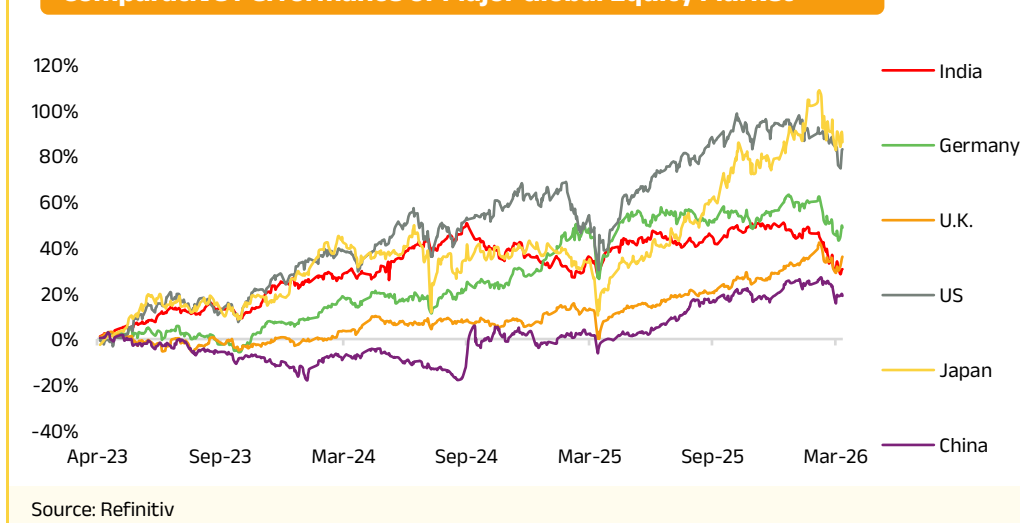
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

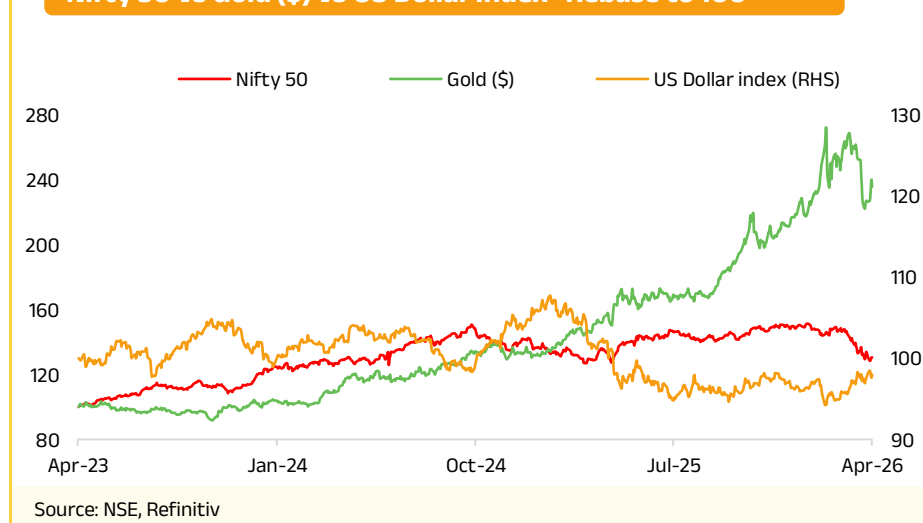
Commodity Prices	2-Apr-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	146,091	-2.67%	2.63%	-12.57%
Gold (\$/oz)	4,675.67	-1.72%	4.08%	-8.08%
Silver (INR/1 kg)	227,633	-4.92%	2.67%	-21.44%
Silver (\$/oz)	72.99	-2.84%	4.89%	-11.03%
Brent Crude(\$/bbl)	136.63	18.87%	12.08%	59.95%
Crude Oil (INR/1 bbl)	9,477.00	-1.24%	6.75%	55.46%
NYMEX Crude(\$/bbl)	112.98	11.15%	11.85%	51.90%
Natural Gas (INR/1 mmbtu)	266.80	-2.27%	-5.32%	2.62%
Aluminium (INR/1 kg)	355.00	0.68%	5.08%	9.91%
Copper (INR/1 kg)	1,195.40	0.67%	1.94%	-5.54%
Nickel (INR/1 kg)	1,650.00	-0.11%	1.46%	0.64%
Lead (INR/1 kg)	201.20	1.36%	2.81%	3.18%
Zinc (INR/1 kg)	326.45	0.59%	3.63%	-2.00%
Mentha Oil (INR/1 kg)	1,116.50	0.13%	1.03%	6.79%
Baltic Dry Index	2,066	1.77%	1.72%	-7.85%

Source: Refinitiv, MCK; 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



Valuation

Definition: Valuation is the process of estimating the intrinsic value of a company's equity based on its financial performance, growth prospects, and risk profile.



Explanation

Valuation helps investors judge whether a stock is fairly priced, overvalued, or undervalued relative to its fundamentals. Common valuation approaches compare earnings, cash flows, or assets with market prices to assess expected returns versus risk. While market prices fluctuate due to sentiment, valuation anchors investment decisions to business fundamentals. A disciplined valuation approach supports better stock selection, reduces emotional bias, and improves long-term investment outcomes.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-8.58	-8.77	-1.99	11.77
Flexi Cap Fund	-7.64	-9.65	-1.20	13.41
Mid Cap Fund	-7.37	-8.52	2.53	18.80
Large & Mid Cap Fund	-7.96	-8.94	0.01	15.57
Small Cap Fund	-5.19	-10.82	-0.62	16.37
Multi Cap Fund	-7.26	-9.43	-0.31	15.96
Focused Fund	-8.20	-9.30	-1.40	12.95
Value Fund	-7.76	-7.51	0.28	15.80
Contra Fund	-8.85	-9.00	-1.17	16.24
ELSS	-7.41	-9.72	-1.05	13.56
Equity Savings	-2.47	-1.38	3.66	8.95
Arbitrage Fund	0.50	3.04	5.87	6.79
Dividend Yield Fund	-7.85	-7.03	0.15	15.32
Aggressive Hybrid Fund	-6.33	-7.10	0.17	11.89
Balanced Advantage	-4.95	-4.96	0.40	9.75

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 02 Apr,

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