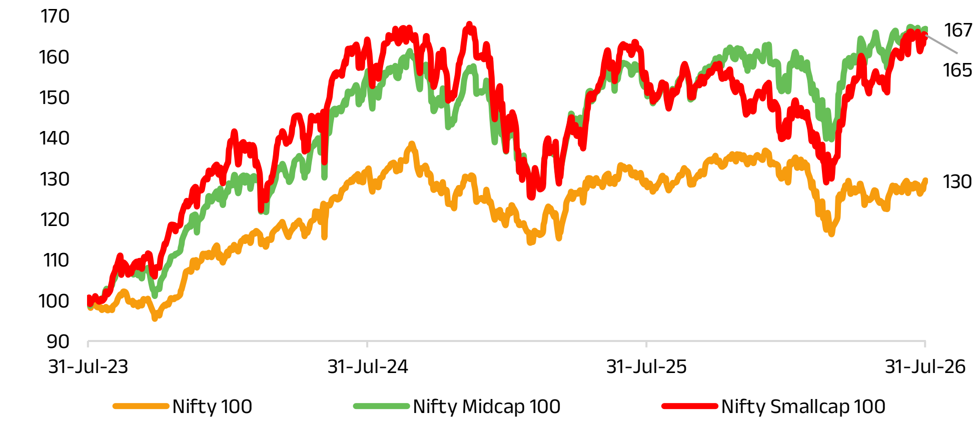
Daily Equity Market Pulse - August 03, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	31-Jul-26	1 Day	1 Week	1 Month
Nifty 50	24,383.60	0.27%	2.59%	2.17%
Nifty 100	25,486.35	0.46%	2.60%	2.29%
Nifty 200	14,106.30	0.46%	2.50%	2.19%
Nifty 500	23,460.70	0.46%	2.39%	2.02%
Nifty Large Midcap 250	16,796.85	0.46%	2.30%	1.95%
Nifty Midcap 150	23,138.45	0.47%	2.00%	1.60%
Nifty Next 50	73,651.30	1.31%	2.63%	2.82%
Nifty Smallcap 250	17,919.90	0.42%	1.81%	1.13%

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

Smart Beta Index

Index	31-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,600.95	1.61%	1.80%	-1.01%
NIFTY 500 Value 50	16,147.85	0.42%	1.57%	0.19%
Nifty 200 Quality 30	20,613.65	-0.26%	2.27%	5.38%
Nifty 50 Equal Weight	33,391.95	0.28%	2.74%	3.16%
NIFTY Alpha Low Volatility 30	27,460.60	0.31%	2.15%	4.44%
Nifty High Beta 50	4,440.75	0.97%	2.86%	3.37%
Nifty Low Volatility 50	25,081.25	-0.04%	2.32%	3.85%
Nifty Midcap150 Momentum 50	62,913.45	1.24%	2.35%	-0.50%
Nifty PSE	9,941.90	0.49%	-0.10%	-0.39%
Nifty SME Emerge	13,977.30	0.60%	0.35%	-0.33%
Nifty 100 ESG	5,090.50	0.67%	3.44%	5.08%

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

Sector Indices

Index	31-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	28,744.15	1.64%	5.61%	8.55%
Nifty Bank	57,264.85	0.21%	1.01%	-0.48%
Nifty Consumption	12,081.85	-0.02%	3.26%	4.92%
Nifty Financial	26,594.05	1.31%	2.64%	0.15%
Nifty FMCG	49,121.20	-1.05%	0.14%	0.67%
Nifty Healthcare	16,755.50	0.33%	3.20%	3.82%
Nifty IT	30,708.90	-1.56%	6.75%	16.77%
Nifty Media	1,618.65	2.09%	5.97%	9.49%
Nifty Metal	12,719.00	0.14%	2.56%	1.60%
Nifty MNC	33,056.15	0.63%	2.15%	1.67%
Nifty Pharma	26,534.80	0.72%	3.86%	4.77%
Nifty Realty	901.45	0.22%	2.23%	8.67%
Nifty Energy	38,729.55	1.09%	-0.24%	-2.54%

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

Nifty 50 Top 5 Gainers

Company	31-Jul-26	Prev_Day	% Change	1 Week
M&M	3,398.50	3,283.70	3.50	7.50
Divi's Lab	8,056.00	7,835.00	2.82	11.14
Adani Ports & SEZ	1,696.50	1,664.10	1.95	-4.06
Tata Motors	339.75	334.20	1.66	4.93
BPCL	319.75	315.80	1.25	3.10

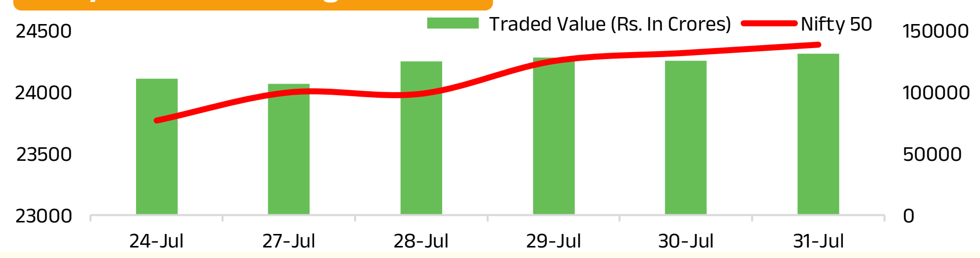
Source: NSE

Nifty 50 Top 5 Losers

Company	31-Jul-26	Prev_Day	% Change	1 Week
TCS	2,365.60	2432	-2.72	4.94
Infosys	1,130.10	1155	-2.16	8.57
Britannia Industries Lim	5,416.50	5525	-1.95	0.69
Shree Cements Limited	26,055.00	26455	-1.51	-2.56
Wipro	183.65	186	-1.44	3.69

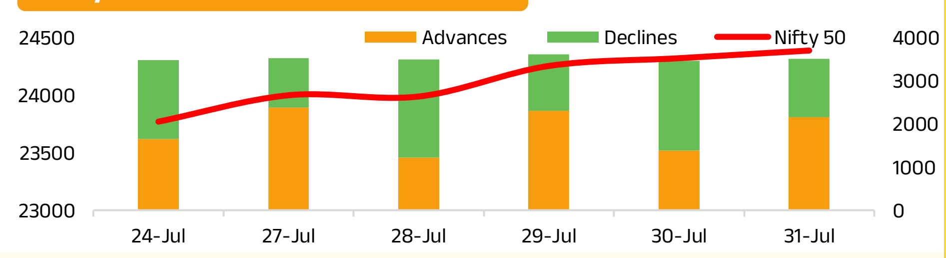
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

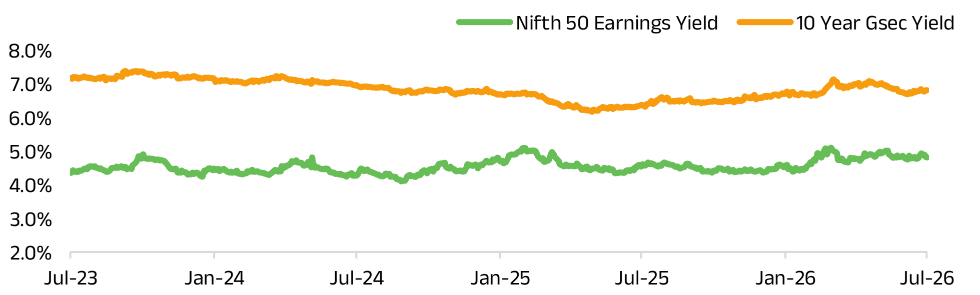
Indian equity markets advanced for a third consecutive session, supported by strong Q1 FY27 earnings from heavyweight companies, renewed foreign institutional investor inflows, positive global cues, and a firmer rupee. However, the overall upside remained limited as domestic information technology stocks came under selling pressure after their recent rally.

Tata Steel reported an 11.6% YoY increase in consolidated net profit attributable to the owners of the company, which rose to Rs. 2,318.35 crore in the first quarter of FY27, driven by strong performance from its India operations. The steel major had reported a net profit of Rs. 2,077.68 crore in the corresponding period last year.

Tata Power Renewable Energy (TPREL), one of India's leading renewable energy companies and a subsidiary of Tata Power, has conducted the groundbreaking ceremony for its 800-megawatt (MW) renewable energy project in Andhra Pradesh, involving an investment of Rs. 5,750 crore.

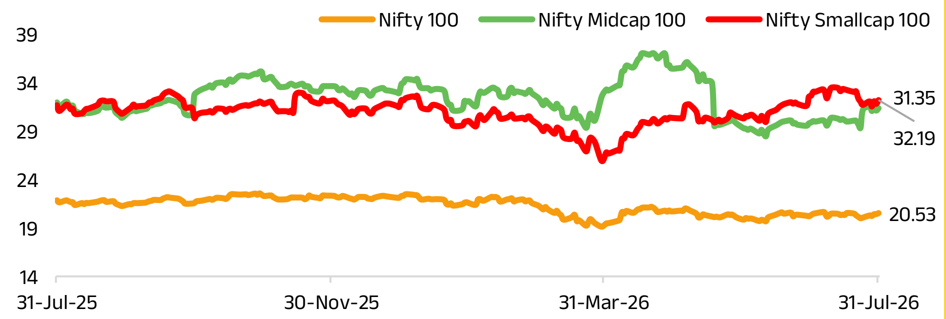
Larsen & Toubro (L&T) announced that it has signed a six-year engineering, procurement, and construction (EPC) framework agreement with Petroleum Development Oman (PDO), the country's leading oil and gas producer.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



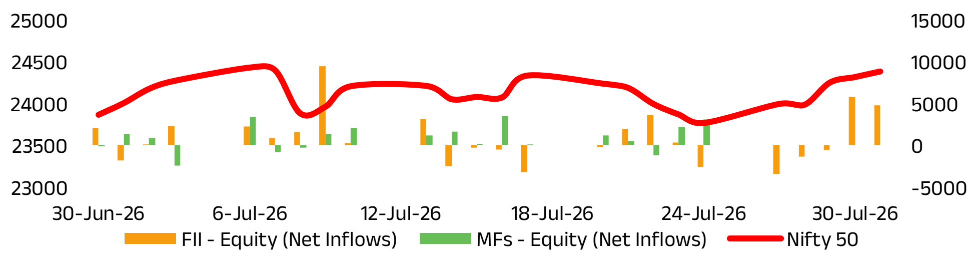
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	4787.78	20,200	20,200	-254,073
MF**	3081.31	17,909	17,909	312,353
DII	2260.37	35,099	35,099	498,991

Source: SEBI, NSDL;**As on 24th Jul 2026;

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F&O Trends

	Latest	Previous	Change %
Near Futures	24452.60	24358.00	0.39%
Near Basis	69.00	40.85	68.91%
Mid Futures	24567.50	24474.30	0.38%
Mid Basis	183.90	157.15	17.02%
Near Open Interest (Cr.)	1.26	1.32	-4.24%
Mid Open Interest (Cr.)	0.11	0.10	2.21%
Rollover (%)	8.44	7.74	9.03%
Put Call Ratio (OI)	1.39	1.26	10.25%
Put Call Ratio(Vol)	0.99	0.88	11.86%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3020	1730	38453
Index Options	3240124	3308981	365791
Stock Futures	18392	18628	432056
Stock Options	17400	17577	31868
Total	3278936	3346916	868169

Source: NSE

Global Equity Market

Global Indices	31-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4076.38	0.61%	1.01%	-0.43%
Nasdaq 100 (U.S.)	28274.19	0.60%	0.52%	-6.61%
FTSE (U.K.)	10868.05	-0.27%	1.23%	3.53%
DAX Index (Germany)	25629.24	0.07%	2.11%	2.53%
CAC 40 Index (France)	8509.64	0.28%	1.64%	1.26%
SSE Composite (China)	3832.26	0.72%	0.47%	-6.40%
Nikkei (Japan)	64362.02	4.03%	-0.39%	-8.14%
Kospi (South Korea)	6595.45	17.91%	-1.42%	-22.19%
HangSeng (Hong Kong)	25884.43	0.10%	3.69%	13.13%
Strait Times (Singapore)	5628.50	-0.79%	0.72%	8.85%
Ibovespa Sao Paulo (Brazil)	177999.00	0.47%	2.27%	3.47%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8976.80	0.10%	2.33%	2.26%
Jakarta Composite (Indonesia)	6236.13	0.80%	0.64%	10.51%
KLSE (Malaysia)	1724.90	0.26%	1.40%	3.66%

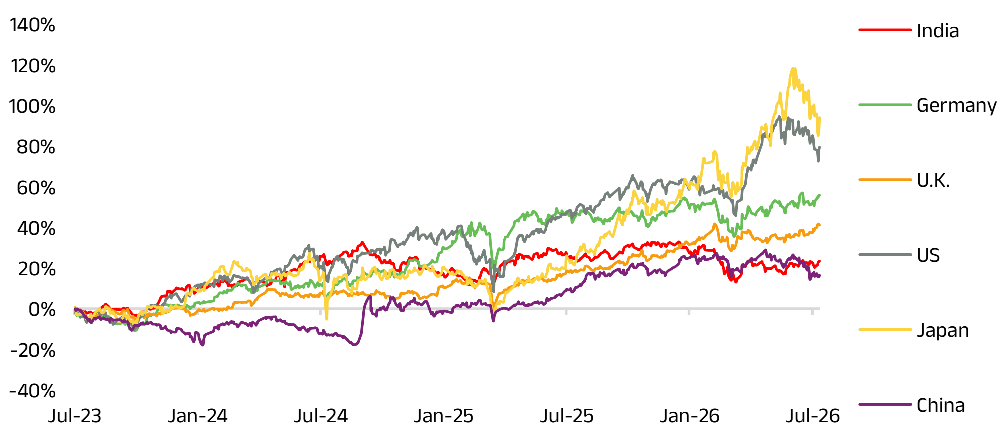
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	31-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	142,295	-0.36%	-0.66%	1.02%
Gold ($/oz)	4,040.94	-1.50%	-0.29%	0.84%
Silver (INR/1 kg)	217,990	-0.39%	-2.17%	-3.17%
Silver ($/oz)	57.63	-2.29%	-0.92%	-1.61%
Brent Crude($/bbl)	95.51	2.16%	-7.09%	36.17%
Crude Oil (INR/1 bbl)	8,002.00	-1.01%	-10.09%	19.88%
NYMEX Crude($/bbl)	85.96	1.19%	-6.10%	22.00%
Natural Gas (INR/1 mmbtu)	264.00	1.34%	-6.22%	-12.03%
Aluminium (INR/1 kg)	341.70	0.06%	-0.86%	2.23%
Copper (INR/1 kg)	1,360.00	0.66%	1.91%	3.51%
Nickel (INR/1 kg)	1,671.30	0.74%	-0.96%	4.29%
Lead (INR/1 kg)	203.50	-1.76%	-0.59%	-0.12%
Zinc (INR/1 kg)	387.05	0.62%	0.39%	5.09%
Mentha Oil (INR/1 kg)	1,357.60	1.69%	-2.07%	19.61%
Baltic Dry Index	2,732	2.21%	-0.40%	9.24%

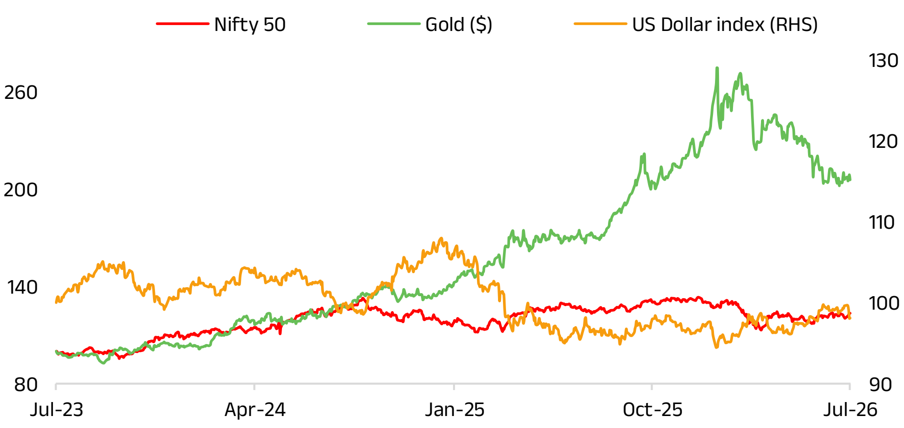
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	2.51	0.14	1.14	10.40
Flexi Cap Fund	2.11	4.28	3.67	12.52
Mid Cap Fund	1.61	9.48	8.04	17.57
Large & Mid Cap Fund	1.77	5.07	4.50	14.39
Small Cap Fund	1.12	15.97	8.52	15.96
Multi Cap Fund	1.72	7.53	5.79	14.81
Focused Fund	2.28	4.34	4.29	12.46
Value Fund	1.36	2.52	4.05	13.47
Contra Fund	1.92	0.03	1.00	14.05
ELSS	1.82	4.18	2.72	12.54
Equity Savings	1.02	2.27	4.47	8.12
Arbitrage Fund	0.61	2.85	5.81	6.68
Dividend Yield Fund	1.89	0.64	3.61	13.44
Aggressive Hybrid Fund	1.65	2.57	2.71	10.88
Balanced Advantage	1.49	1.98	2.66	9.22

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.