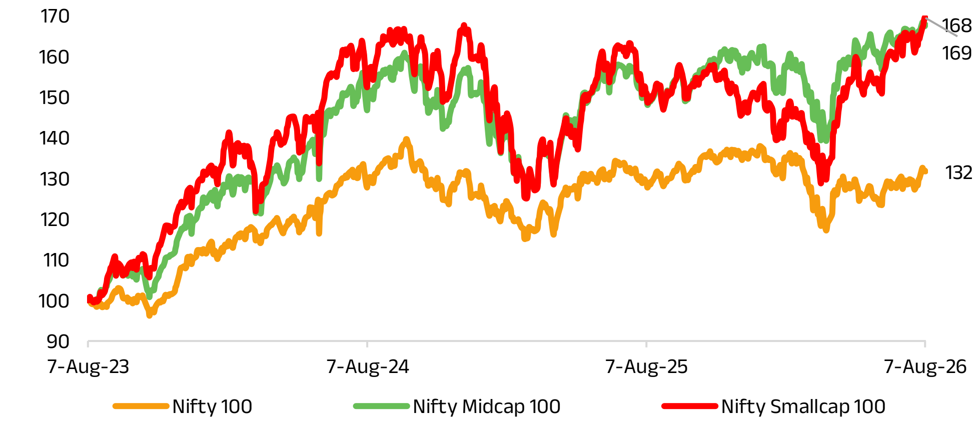
Daily Equity Market Pulse - August 10, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	7-Aug-26	1 Day	1 Week	1 Month
Nifty 50	24,570.65	-0.27%	0.77%	0.70%
Nifty 100	25,712.70	-0.17%	0.89%	1.19%
Nifty 200	14,231.10	-0.10%	0.88%	1.33%
Nifty 500	23,712.10	-0.07%	1.07%	1.47%
Nifty Large Midcap 250	16,952.90	0.03%	0.93%	1.58%
Nifty Midcap 150	23,362.90	0.22%	0.97%	1.97%
Nifty Next 50	74,697.55	0.23%	1.42%	3.39%
Nifty Smallcap 250	18,356.55	-0.01%	2.44%	2.25%

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

Smart Beta Index

Index	7-Aug-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,040.20	0.40%	1.44%	2.49%
NIFTY 500 Value 50	16,450.05	0.61%	1.87%	2.12%
Nifty 200 Quality 30	21,020.40	0.70%	1.97%	4.43%
Nifty 50 Equal Weight	33,696.45	-0.18%	0.91%	1.97%
NIFTY Alpha Low Volatility 30	27,657.45	0.13%	0.72%	2.54%
Nifty High Beta 50	4,510.10	-0.02%	1.56%	3.04%
Nifty Low Volatility 50	25,206.55	-0.12%	0.50%	1.61%
Nifty Midcap150 Momentum 50	63,798.35	0.31%	1.41%	3.26%
Nifty PSE	9,922.35	-0.15%	-0.20%	-0.36%
Nifty SME Emerge	14,255.10	0.24%	1.99%	1.34%
Nifty 100 ESG	5,132.10	-0.22%	0.82%	2.96%

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

Sector Indices

Index	7-Aug-26	1 Day	1 Week	1 Month
Nifty Auto	29,647.90	1.84%	3.14%	8.43%
Nifty Bank	57,746.45	-0.55%	0.84%	-0.78%
Nifty Consumption	12,197.35	0.21%	0.96%	2.72%
Nifty Financial	26,466.00	-1.48%	-0.48%	-1.92%
Nifty FMCG	49,435.20	0.13%	0.64%	-1.57%
Nifty Healthcare	16,708.90	0.07%	-0.28%	2.23%
Nifty IT	31,547.70	1.42%	2.73%	12.92%
Nifty Media	1,554.95	0.00%	-3.94%	4.58%
Nifty Metal	13,189.85	0.50%	3.70%	4.82%
Nifty MNC	33,707.10	0.61%	1.97%	2.16%
Nifty Pharma	26,541.80	-0.09%	0.03%	3.37%
Nifty Realty	885.95	-0.10%	-1.72%	-0.75%
Nifty Energy	38,749.85	0.17%	0.05%	-1.12%

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

Nifty 50 Top 5 Gainers

Company	7-Aug-26	Prev_Day	% Change	1 Week
TCS	2,452.70	2,373.00	3.36	3.68
Grasim Indus	3,323.00	3,220.00	3.20	7.17
Hindalco	1,059.60	1,027.00	3.17	8.74
Hero Moto	5,725.00	5,550.50	3.14	6.29
M&M	3,502.00	3,406.00	2.82	3.05

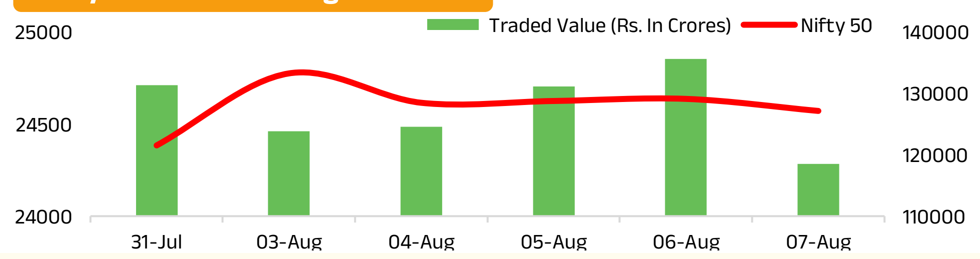
Source: NSE

Nifty 50 Top 5 Losers

Company	7-Aug-26	Prev_Day	% Change	1 Week
ICICI Bank	1,421.00	1458	-2.50	-1.00
Axis Bank	1,238.00	1256	-1.43	0.69
Titan Industries Limited	4,941.00	4998	-1.14	1.35
Shree Cements Limited	26,010.00	26245	-0.90	-0.17
Cipla	1,463.80	1477	-0.89	-0.64

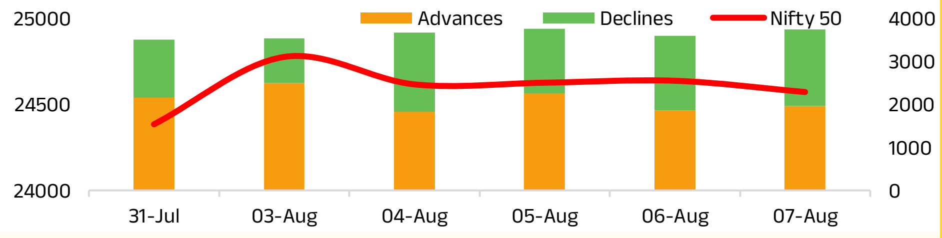
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

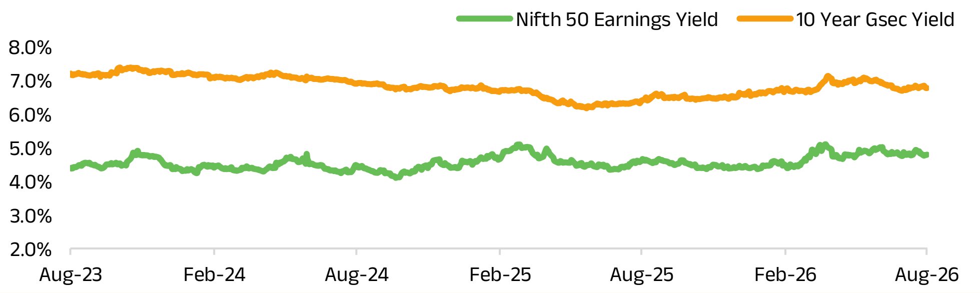
Indian equity markets closed in the red, weighed down by a resurgence in geopolitical and trade-related tensions. Investor sentiment weakened as tensions in the Middle East escalated following attacks by the Iran-backed Houthis on a military camp in Yemen and targets in Saudi Arabia, one of the world's largest oil suppliers.

State Bank of India reported net profit of Rs. 21,121 crore for the quarter ended Jun 2026, reflecting around 10% YoY growth. The performance was supported by steady business momentum and core banking operations. The results indicate resilience in earnings despite a dynamic operating environment.

Godrej Consumer Products reported net profit of Rs. 504.5 crore for the quarter ended Jun 2026, up 11.5% YoY. The company delivered profit growth alongside continued demand across its consumer product portfolio. The result highlights stable execution and operating performance during the quarter.

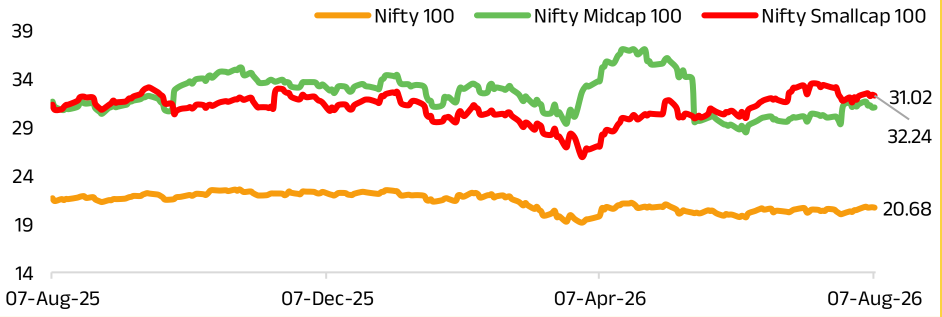
JK Tyre & Industries reported net profit of Rs. 44.09 crore for the quarter ended Jun 2026, down 73% YoY. Earnings were impacted by pressures on profitability during the period. The sharp decline contrasts with the company's earlier performance and reflects a challenging quarter.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



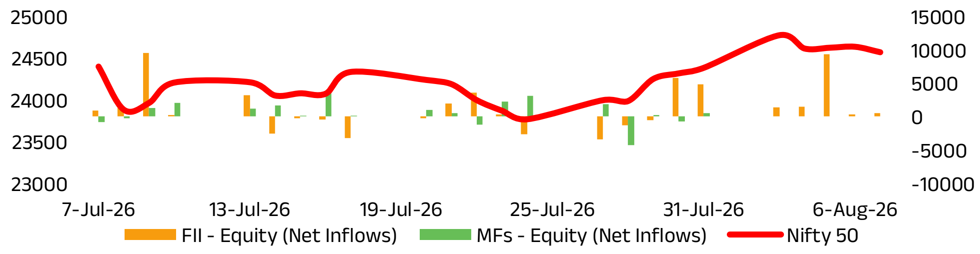
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	466.29	12,921	33,121	-241,152
MF**	478.22		15,182	309,626
DII	235.56	7,767	42,867	506,758

Source: SEBI, NSDL;**As on 31st Jul 2026;

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F&O Trends

	Latest	Previous	Change %
Near Futures	24655.00	24739.40	-0.34%
Near Basis	84.35	103.40	-18.42%
Mid Futures	24789.70	24861.40	-0.29%
Mid Basis	219.05	225.40	-2.82%
Near Open Interest (Cr.)	1.20	1.18	1.82%
Mid Open Interest (Cr.)	0.13	0.12	3.50%
Rollover (%)	11.13	10.83	2.85%
Put Call Ratio (OI)	0.89	1.05	-14.87%
Put Call Ratio(Vol)	1.04	1.01	2.88%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3133	875	33419
Index Options	2397530	2410652	410969
Stock Futures	17654	17412	440101
Stock Options	22580	22754	60350
Total	2440897	2451692	944838

Source: NSE

Global Equity Market

Global Indices	7-Aug-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4227.99	0.74%	3.72%	3.32%
Nasdaq 100 (U.S.)	29722.30	1.19%	5.12%	1.88%
FTSE (U.K.)	10901.09	0.31%	0.30%	2.21%
DAX Index (Germany)	26319.45	0.69%	2.69%	3.35%
CAC 40 Index (France)	8714.93	0.17%	2.41%	3.30%
SSE Composite (China)	3940.04	1.02%	2.81%	-1.26%
Nikkei (Japan)	65606.71	-0.12%	1.93%	-3.88%
Kospi (South Korea)	6258.77	-0.60%	-5.10%	-18.25%
HangSeng (Hong Kong)	25668.03	0.54%	-0.84%	9.24%
Strait Times (Singapore)	5698.43	1.05%	1.24%	6.67%
Ibovespa Sao Paulo (Brazil)	172513.42	-1.73%	-3.08%	0.29%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	9263.60	-0.09%	3.19%	5.22%
Jakarta Composite (Indonesia)	6409.65	1.04%	2.78%	7.07%
KLSE (Malaysia)	1735.75	-0.08%	0.63%	3.14%

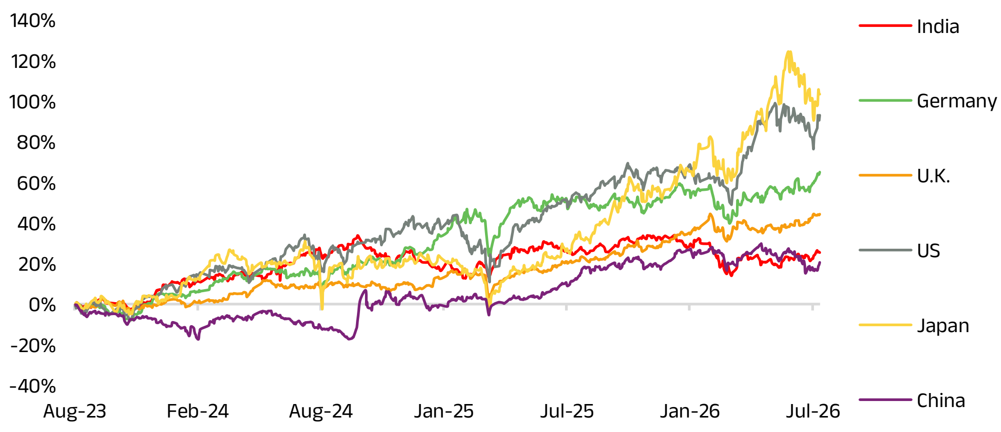
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	7-Aug-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	149,197	0.82%	4.85%	3.92%
Gold ($/oz)	4,341.71	2.42%	7.44%	5.75%
Silver (INR/1 kg)	232,187	2.89%	6.51%	1.89%
Silver ($/oz)	63.55	3.37%	10.27%	5.90%
Brent Crude($/bbl)	93.09	2.07%	-2.53%	32.91%
Crude Oil (INR/1 bbl)	7,358.00	2.84%	-8.05%	12.47%
NYMEX Crude($/bbl)	79.57	1.13%	-7.43%	11.40%
Natural Gas (INR/1 mmbtu)	251.30	-1.72%	-4.81%	-18.86%
Aluminium (INR/1 kg)	353.60	1.12%	3.48%	5.87%
Copper (INR/1 kg)	1,396.30	-0.88%	2.67%	8.46%
Nickel (INR/1 kg)	1,651.80	0.08%	-1.17%	3.87%
Lead (INR/1 kg)	209.40	2.55%	2.90%	1.50%
Zinc (INR/1 kg)	397.05	-0.61%	2.58%	5.65%
Mentha Oil (INR/1 kg)	1,331.30	0.41%	-1.94%	-1.47%
Baltic Dry Index	3,089	1.05%	13.07%	7.44%

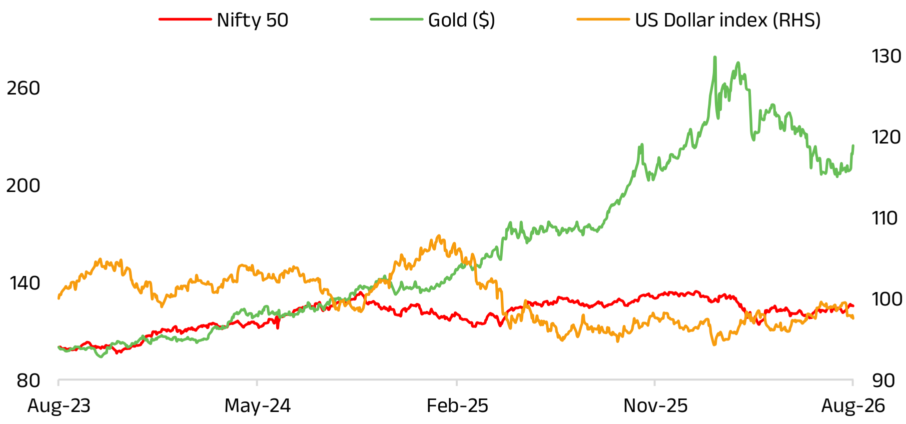
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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

Economic Moat

Definition: An economic moat refers to a sustainable competitive advantage that enables a company to protect its market position and maintain profitability over an extended period. This advantage may arise from strong brand recognition, cost leadership, intellectual property, network effects, customer loyalty, or other unique strengths that are difficult for competitors to replicate.

Explanation

The concept of an economic moat helps investors evaluate the long-term strength and resilience of a business. Companies with durable competitive advantages are often better positioned to withstand competitive pressures and changing market conditions. A strong moat can support consistent earnings, stronger customer retention, and greater pricing power. When assessing equity investments, understanding the sources and sustainability of a company's economic moat can provide valuable insights into its ability to create long-term shareholder value and maintain its industry leadership.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.62	-0.22	3.12	11.04
Flexi Cap Fund	2.48	4.58	6.37	13.33
Mid Cap Fund	2.59	9.10	10.78	18.31
Large & Mid Cap Fund	2.19	5.05	7.14	15.19
Small Cap Fund	3.28	16.93	13.67	16.98
Multi Cap Fund	2.53	7.75	9.09	15.64
Focused Fund	2.31	4.58	7.16	13.24
Value Fund	1.37	2.61	6.87	14.22
Contra Fund	1.31	0.27	3.51	14.80
ELSS	1.98	4.32	5.56	13.23
Equity Savings	0.80	2.25	5.13	8.34
Arbitrage Fund	0.42	2.82	5.88	6.65
Dividend Yield Fund	1.85	1.06	6.19	14.24
Aggressive Hybrid Fund	1.58	2.48	4.72	11.49
Balanced Advantage	1.25	1.97	4.22	9.63

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.