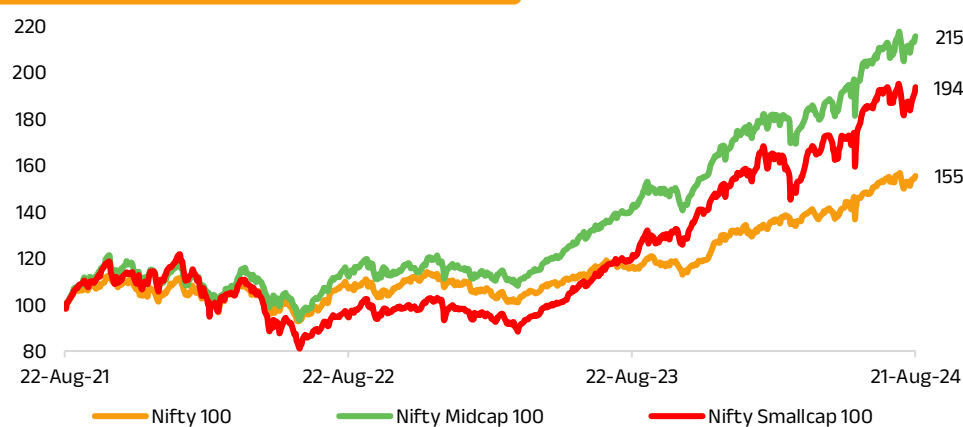


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 21-Aug-24 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|-------|--------|---------|
| Nifty 50 | 24,770.20 | 0.29% | 2.59% | 0.98% |
| Nifty 100 | 25,853.20 | 0.27% | 2.75% | 1.58% |
| Nifty 200 | 14,070.80 | 0.29% | 2.85% | 2.05% |
| Nifty 500 | 23,368.65 | 0.38% | 3.07% | 2.25% |
| Nifty Large Midcap 250 | 16,319.95 | 0.34% | 3.05% | 2.71% |
| Nifty Midcap 150 | 21,617.70 | 0.41% | 3.35% | 3.87% |
| Nifty Next 50 | 74,178.50 | 0.28% | 3.54% | 3.96% |
| Nifty Smallcap 250 | 17,927.75 | 1.10% | 4.96% | 4.45% |

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

Smart Beta Index

| Index | 21-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|-------|--------|---------|
| Nifty 200 Momentum 30 Index | 36,362.85 | 0.40% | 3.37% | 4.72% |
| NIFTY 500 Value 50 | 15,219.20 | 0.48% | 4.79% | 2.78% |
| Nifty 200 Quality 30 | 22,521.90 | 0.81% | 3.66% | 4.01% |
| Nifty 50 Equal Weight | 31,844.80 | 0.63% | 3.49% | 2.89% |
| NIFTY Alpha Low Volatility 30 | 29,755.95 | 0.49% | 2.10% | 3.64% |
| Nifty High Beta 50 | 4,165.22 | 0.51% | 4.61% | 0.23% |
| Nifty Low Volatility 50 | 25,166.45 | 0.64% | 2.84% | 2.74% |
| Nifty Midcap150 Momentum 50 | 65,012.30 | 0.15% | 3.36% | 3.37% |
| Nifty PSE | 11,380.95 | 0.13% | 3.68% | 4.14% |
| Nifty SME Emerge | 15,527.35 | 0.94% | 3.79% | 7.77% |
| Nifty 100 ESG | 4,970.50 | 0.30% | 3.14% | 2.08% |

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

Sector Indices

| Index | 21-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 25,586.75 | 0.34% | 1.97% | 2.50% |
| Nifty Bank | 50,685.55 | -0.23% | 1.93% | -3.02% |
| Nifty Consumption | 11,903.10 | 0.77% | 2.25% | 4.47% |
| Nifty Financial | 23,143.65 | -0.15% | 2.44% | -1.92% |
| Nifty FMCG | 63,091.90 | 1.37% | 2.91% | 3.28% |
| Nifty Healthcare | 14,139.85 | 0.86% | 2.62% | 9.04% |
| Nifty IT | 41,570.85 | 0.00% | 4.63% | 4.13% |
| Nifty Media | 2,100.05 | 1.20% | 4.10% | 6.98% |
| Nifty Metal | 9,264.05 | 0.65% | 4.75% | 0.08% |
| Nifty MNC | 31,002.15 | 0.97% | 3.01% | 1.80% |
| Nifty Pharma | 22,577.90 | 0.91% | 2.57% | 10.54% |
| Nifty Realty | 1,038.55 | -1.31% | 1.51% | -5.26% |
| Nifty Energy | 43,591.45 | 0.15% | 3.06% | 3.63% |

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

Nifty 50 Top 5 Gainers

| Company | 21-Aug-24 | Prev_Day | % Change | 1 Week |
|--|-----------|----------|----------|--------|
| Divi's Lab | 4,900.80 | 4,723.15 | 3.76 | 5.12 |
| Titan Industries Limited | 3,560.40 | 3,474.90 | 2.46 | 4.65 |
| SBI Life Insurance Company Limited | 1,800.60 | 1,761.30 | 2.23 | 6.41 |
| Cipla | 1,594.60 | 1,562.85 | 2.03 | 1.97 |
| HDFC Standard Life Insurance Company Limited | 724.55 | 710.60 | 1.96 | 5.57 |

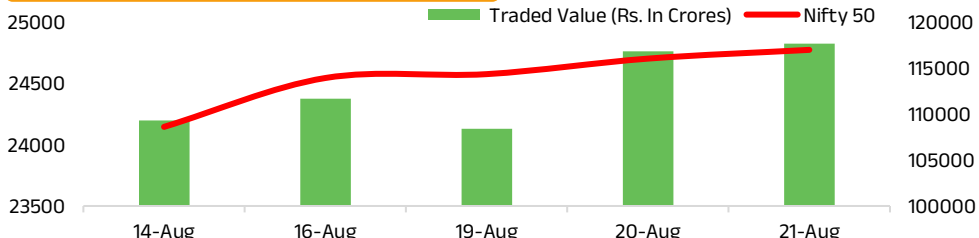
Source: NSE

Nifty 50 Top 5 Losers

| Company | 21-Aug-24 | Prev_Day | % Change | 1 Week |
|---------------|-----------|----------|----------|--------|
| Tech Mahindra | 1,604.65 | 1629 | -1.47 | 5.26 |
| Ultratech Cem | 11,200.90 | 11350 | -1.31 | 1.80 |
| Power Grid | 336.65 | 341 | -1.13 | 0.94 |
| ONGC | 327.70 | 330 | -0.73 | -0.14 |
| HDFC Bank | 1,625.80 | 1638 | -0.73 | 1.12 |

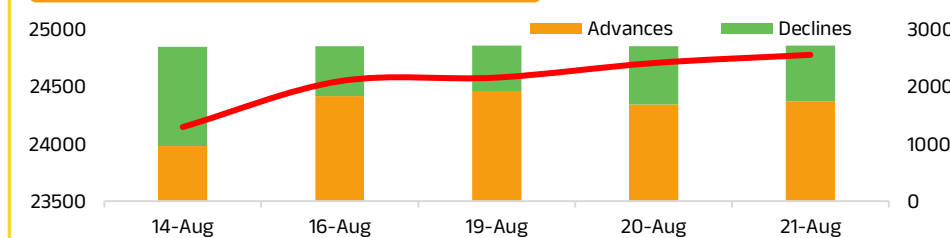
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

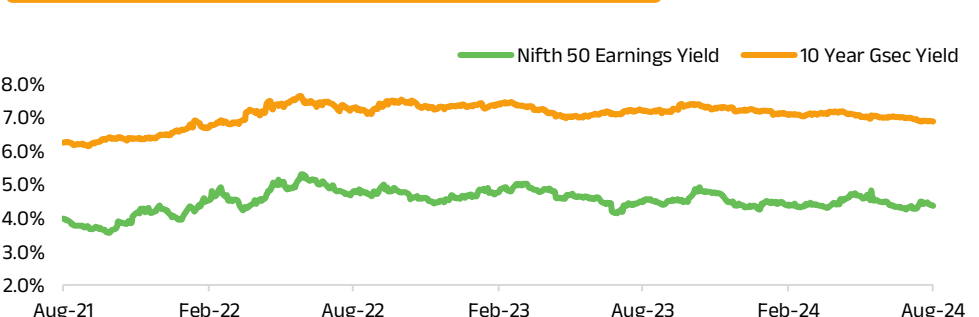
Indian equity market rose slightly tracking mixed cues from global markets. A cautious undertone prevailed ahead of the U.S. Federal Reserve's minutes from the Jul 2024 meeting, as well as the preliminary revisions to U.S. nonfarm payrolls later today, which may offer enhanced insight into the potential easing of monetary policy.

JK Tyre & Industries plans to invest Rs. 1.32 crore to obtain a 26% equity stake in Truere Galaxy Private Limited, a firm dedicated to solar power generation. This strategic investment will involve purchasing 1.32 million equity shares at a face value of Rs. 10 per share.

Tata Motors has revealed a partnership with Delta Electronics India and Thunderplus Solutions Pvt Ltd to improve the electric vehicle (EV) charging infrastructure nationwide. This collaboration seeks to promote the uptake of electric vehicles, especially within the commercial sector, by increasing the number of charging stations along major transportation routes.

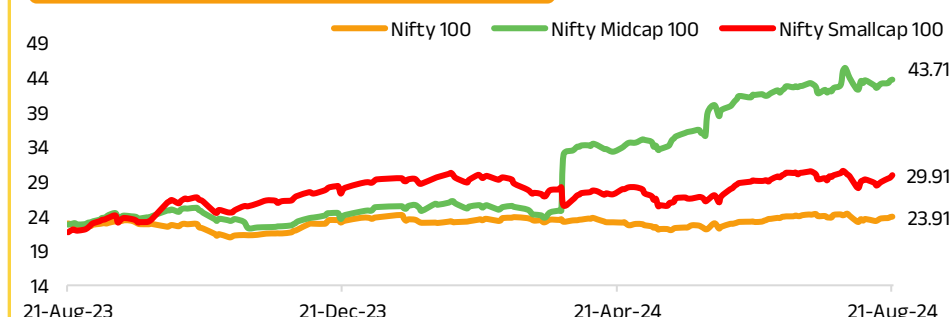
JM Financial Private Equity, via its subsidiary JM Financial India Growth Fund III, announced an investment of Rs. 40 crore in Asquare Foods and Beverages. Asquare Foods and Beverages is the parent company of the direct-to-consumer spice brand Zoff.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



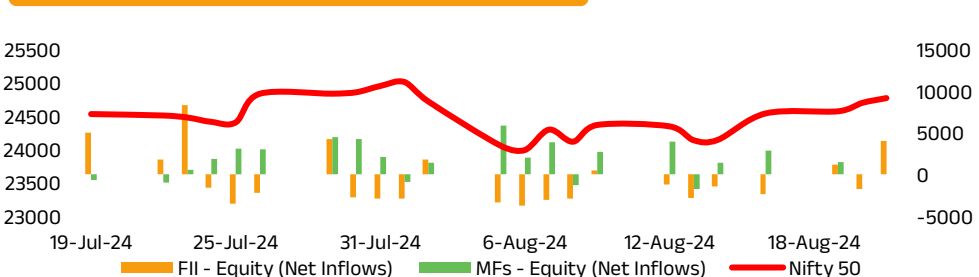
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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 | 4034.96 | -17,726 | 14,639 | 17,839 |
| MF** | 1495.39 | 21,579 | 42,180 | 233,606 |
| DII | 3097.45 | 41,213 | 64,699 | 300,826 |

Source: SEBI, NSDL; **As on 19th Aug 2024;

F&O Trends

| | Latest | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures | 24798.20 | 24711.30 | 0.35% |
| Near Basis | 27.95 | 12.40 | 125.40% |
| Mid Futures | 24922.80 | 24841.20 | 0.33% |
| Mid Basis | 152.65 | 142.30 | 7.27% |
| Near Open Interest (Cr.) | 1.07 | 1.08 | -0.50% |
| Mid Open Interest (Cr.) | 0.19 | 0.17 | 12.33% |
| Rollover (%) | 17.81 | 16.28 | 9.39% |
| Put Call Ratio (OI) | 1.24 | 1.27 | -2.28% |
| Put Call Ratio(Vol) | 0.93 | 0.97 | -3.88% |

Source: NSE

FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 3903 | 1929 | 36024 |
| Index Options | 2766786 | 2779336 | 391568 |
| Stock Futures | 26765 | 24442 | 323799 |
| Stock Options | 49111 | 47484 | 69055 |
| Total | 2846565 | 2853191 | 820446 |

Source: NSE

Global Equity Market

| Global Indices | 21-Aug-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.) | 3065.45 | 0.50% | 3.08% | 2.10% |
| Nasdaq 100 (U.S.) | 19824.84 | 0.53% | 4.22% | 1.55% |
| FTSE (U.K.) | 8283.43 | 0.12% | 0.03% | 1.57% |
| DAX Index (Germany) | 18448.95 | 0.50% | 3.15% | 1.52% |
| CAC 40 Index (France) | 7524.72 | 0.52% | 2.61% | -0.13% |
| SSE Composite (China) | 2856.58 | -0.35% | 0.21% | -4.22% |
| Nikkei (Japan) | 37951.80 | -0.29% | 4.14% | -5.27% |
| Kospi (South Korea) | 2701.13 | 0.17% | 2.14% | -3.37% |
| HangSeng (Hong Kong) | 17391.01 | -0.69% | 1.62% | -0.15% |
| Strait Times (Singapore) | 3373.76 | 0.10% | 2.66% | -2.14% |
| Ibovespa Sao Paulo (Brazil) | 136463.65 | 0.28% | 2.36% | 6.93% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 8010.50 | 0.16% | 2.04% | 0.49% |
| Jakarta Composite (Indonesia) | 7554.59 | 0.27% | 1.59% | 3.57% |
| KLSE (Malaysia) | 1635.32 | -0.45% | 1.42% | -0.08% |

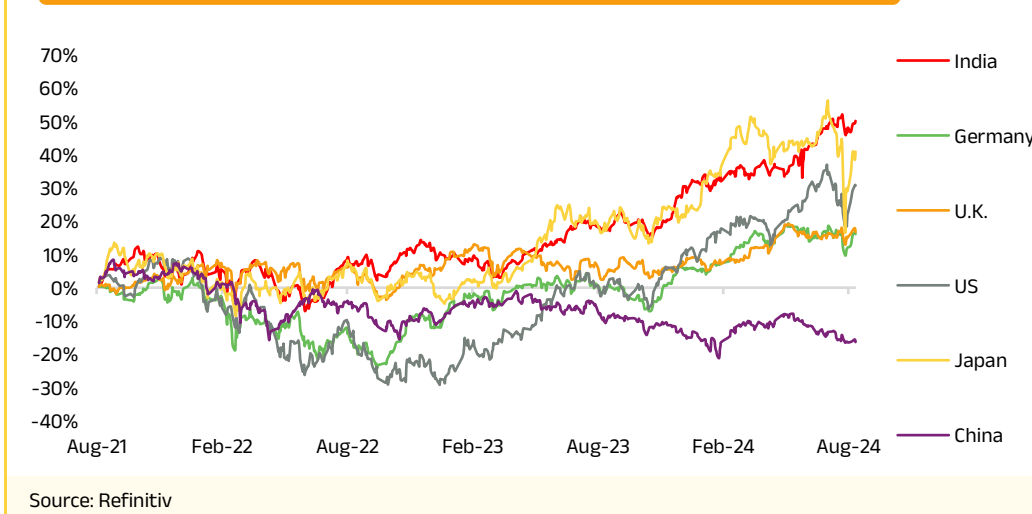
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

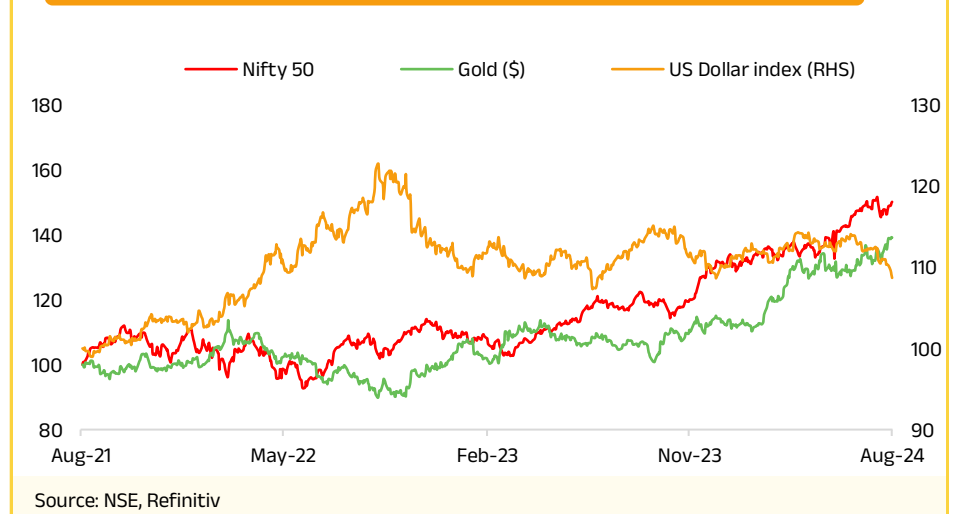
| Commodity Prices | 21-Aug-24 | 1 Day | 1 Week | 1 Month |
|---------------------------------|-----------|--------|--------|---------|
| Gold (INR/10 gm) | 71,417 | -0.36% | 1.38% | -2.39% |
| Gold (\$/oz) | 2,511.95 | -0.07% | 2.63% | 4.63% |
| Silver (INR/1 kg) | 84,748 | -0.42% | 4.83% | -4.65% |
| Silver (\$/oz) | 29.63 | 0.68% | 7.38% | 1.25% |
| Brent Crude(\$/bbl) | 80.97 | 1.15% | -2.86% | -6.58% |
| Crude Oil (INR/1 bbl) | 6,130.00 | -1.78% | -6.82% | -11.51% |
| NYMEX Crude(\$/bbl) | 72.66 | -3.27% | -7.23% | -10.66% |
| Natural Gas (INR/1 mmbtu) | 184.20 | -1.81% | 2.11% | 3.66% |
| Aluminium (INR/1 kg) | 227.65 | 0.89% | 4.59% | 1.56% |
| Copper (INR/1 kg) | 803.10 | -0.01% | 1.90% | -2.44% |
| Nickel (INR/1 kg) | 1,429.10 | 0.70% | 4.44% | 3.62% |
| Lead (INR/1 kg) | 194.85 | 0.78% | 3.37% | -0.08% |
| Zinc (INR/1 kg) | 270.40 | 0.20% | 3.60% | 0.48% |
| Mentha Oil (INR/1 kg) | 1,006.50 | 0.85% | -0.11% | 3.76% |
| Baltic Dry Index ⁽¹⁾ | 1,735 | 1.58% | 0.41% | -8.78% |

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



Speculative Shares

Definition: Speculation is the practice of engaging in a transaction in which an investor puts his money in a risky financial instrument with the objective of generating significant returns from it. Speculative share or a speculative stock can thus be defined as one that contains a very high element of risk. Such stocks usually trade at very low prices but at times can fluctuate considerably and provide windfall gains (and losses as well) to an investor.



Explanation

Since speculative shares normally trade at very low prices, a trader can buy such stocks in considerable volume. If the stock moves up even marginally, then also the investor can book windfall gains by selling it in the market. It needs to be noted that speculative stocks tend to outperform in bull markets and underperform in bearish market. Speculative stocks often account for a very small portion of the portfolio of experienced investors as they can boost the returns within a short span of time.

Mutual Fund Category Performance - Equity & Hybrid

| Category | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund | 1.76 | 15.84 | 36.13 | 16.93 |
| Mid Cap Fund | 4.18 | 23.96 | 51.42 | 25.52 |
| Large & Mid Cap Fund | 3.50 | 20.18 | 44.71 | 21.71 |
| Small Cap Fund | 5.16 | 21.80 | 48.31 | 26.84 |
| Multi Cap Fund | 3.95 | 19.93 | 45.66 | 23.33 |
| Focused Fund | 3.10 | 18.26 | 39.37 | 18.77 |
| Value Fund | 2.86 | 18.02 | 47.58 | 23.64 |
| Contra Fund | 3.11 | 19.98 | 49.96 | 26.07 |
| ELSS | 3.09 | 17.95 | 40.84 | 21.04 |
| Equity Savings | 1.28 | 7.54 | 16.18 | 9.64 |
| Arbitrage Fund | 0.46 | 3.55 | 7.45 | 5.58 |
| Dividend Yield Fund | 3.48 | 19.15 | 49.86 | 24.44 |
| Aggressive Hybrid Fund | 2.34 | 15.01 | 31.86 | 16.12 |
| Balanced Advantage | 1.82 | 10.79 | 25.19 | 12.85 |

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 20 Aug, 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.