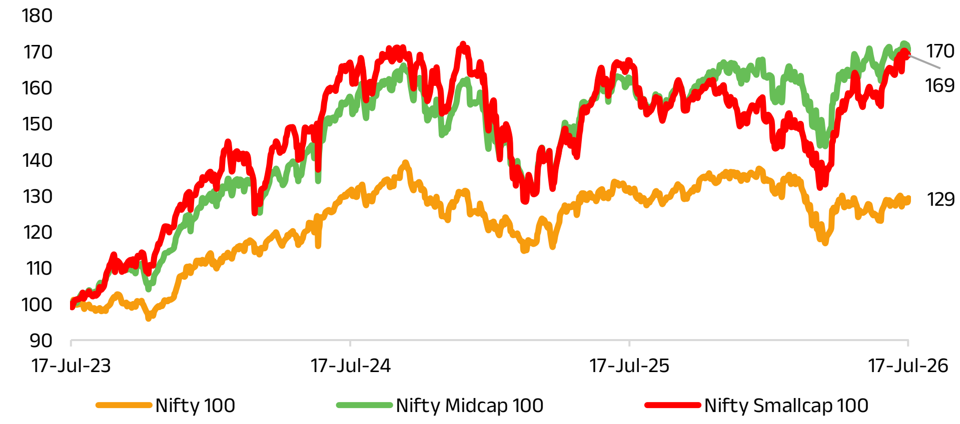
Daily Equity Market Pulse - July 20, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	17-Jul-26	1 Day	1 Week	1 Month
Nifty 50	24,334.30	1.09%	0.53%	1.03%
Nifty 100	25,327.65	0.87%	0.29%	0.74%
Nifty 200	14,014.15	0.61%	0.03%	0.69%
Nifty 500	23,336.30	0.45%	-0.05%	0.98%
Nifty Large Midcap 250	16,682.65	0.23%	-0.29%	0.77%
Nifty Midcap 150	22,967.90	-0.40%	-0.86%	0.80%
Nifty Next 50	71,828.40	-0.10%	-0.78%	-0.60%
Nifty Smallcap 250	18,003.50	-0.58%	-0.64%	2.90%

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

Smart Beta Index

Index	17-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,201.75	-1.19%	-1.32%	-3.02%
NIFTY 500 Value 50	15,977.05	0.17%	-0.65%	-3.14%
Nifty 200 Quality 30	20,117.05	0.64%	0.45%	-0.53%
Nifty 50 Equal Weight	32,844.55	0.72%	0.17%	0.70%
NIFTY Alpha Low Volatility 30	26,762.65	0.15%	-0.45%	2.01%
Nifty High Beta 50	4,444.70	0.22%	-0.40%	2.57%
Nifty Low Volatility 50	24,575.10	0.46%	-0.13%	1.12%
Nifty Midcap150 Momentum 50	62,140.60	-0.92%	-1.22%	-3.14%
Nifty PSE	9,938.55	0.28%	0.28%	-1.78%
Nifty SME Emerge	14,142.05	-0.42%	0.72%	1.03%
Nifty 100 ESG	4,991.25	0.74%	0.67%	1.60%

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

Sector Indices

Index	17-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	27,099.75	1.24%	0.89%	1.40%
Nifty Bank	58,521.40	1.63%	0.82%	1.63%
Nifty Consumption	11,705.00	0.39%	-0.28%	1.30%
Nifty Financial	26,903.35	1.31%	0.27%	1.89%
Nifty FMCG	48,748.70	0.70%	-1.14%	-1.63%
Nifty Healthcare	16,282.90	-1.28%	-0.34%	5.71%
Nifty IT	29,226.60	1.75%	4.34%	1.45%
Nifty Media	1,521.45	0.00%	2.50%	1.05%
Nifty Metal	12,436.95	-0.47%	-1.99%	-4.41%
Nifty MNC	32,498.40	-0.17%	-0.58%	-0.49%
Nifty Pharma	25,645.00	-1.40%	-0.11%	6.21%
Nifty Realty	918.70	1.38%	-2.12%	12.78%
Nifty Energy	39,277.00	-0.17%	0.09%	-2.39%

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

Nifty 50 Top 5 Gainers

Company	17-Jul-26	Prev_Day	% Change	1 Week
Tech Mahindra	1,572.90	1,510.30	4.14	8.12
TCS	2,269.00	2,201.00	3.09	9.67
RIL	1,327.20	1,296.60	2.36	1.48
HUL	2,143.80	2,098.40	2.16	-0.32
M&M	3,179.20	3,117.80	1.97	1.59

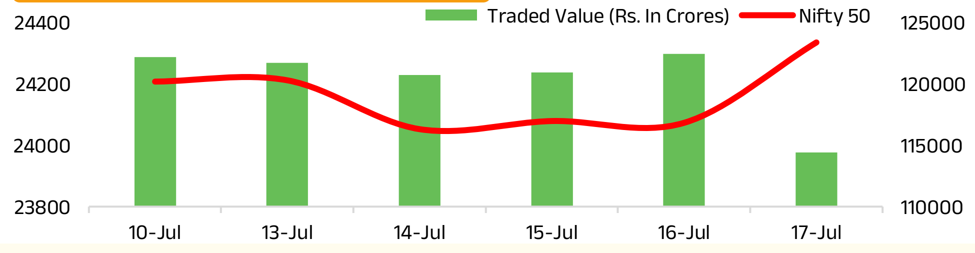
Source: NSE

Nifty 50 Top 5 Losers

Company	17-Jul-26	Prev_Day	% Change	1 Week
Shree Cements Limited	26,515.00	27000	-1.80	-0.38
Hindalco	944.15	959	-1.58	-2.41
United Phos	616.60	626	-1.48	3.67
Wipro	176.00	178	-0.98	0.31
Divi's Lab	7,247.50	7316	-0.94	6.02

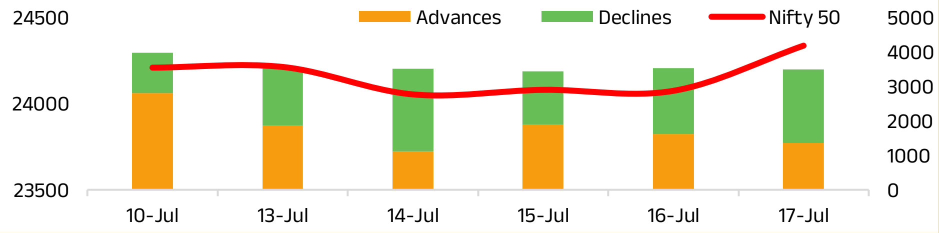
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

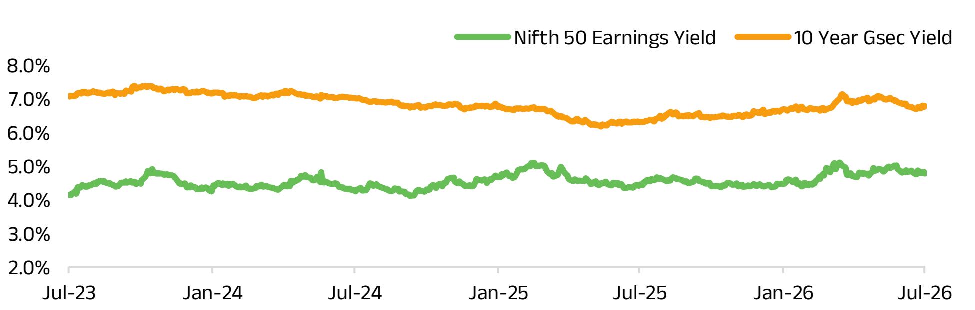
Indian equity markets advanced, supported by strong buying in information technology and banking stocks amid optimism over corporate business updates and expectations of robust first-quarter earnings. Sentiment was further boosted by expectations that the upcoming MSCI Index rebalancing could include additional Indian stocks, potentially attracting about $2.3 billion in passive investment inflows.

JSW Steel's consolidated net profit more than doubled YoY to Rs. 4,696 crore in the quarter ended June 30, 2026, as revenue increased while expenses grew at a slower pace. The steelmaker had reported a net profit of Rs. 2,209 crore in the corresponding period last year.

RPG Group-owned tyre maker Ceat reported that its net profit slumped 96.4% YoY to Rs. 4 crore for the first quarter of financial year 2026–27 (Q1 FY27). The sharp decline was primarily due to a nearly Rs. 50 crore impact from the depreciation of the Sri Lankan rupee on dollar-denominated debt at its overseas subsidiary, along with losses from newly acquired businesses arising from investments in new warehouses and infrastructure, as well as lower initial operating levels.

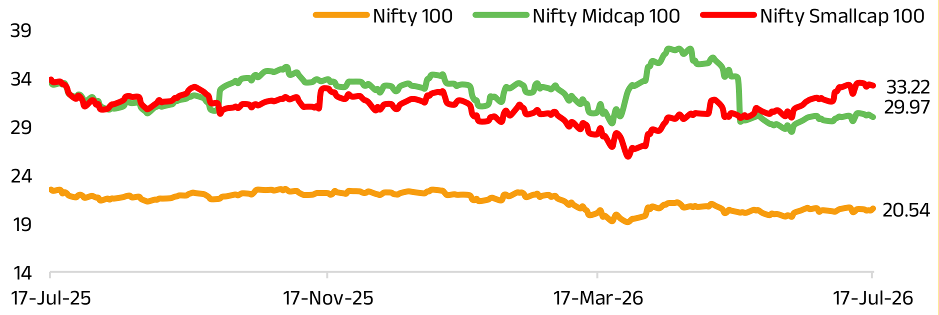
Groyyo, a business-to-business platform that uses artificial intelligence to help fashion brands design, source, and manufacture apparel, has secured the first close of its Series B funding round, raising Rs. 90 crore. The round was led by Cornerstone Ventures, with participation from existing investors. The company said it plans to use the proceeds to expand into new markets, grow its supplier network, and further develop its AI platform.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



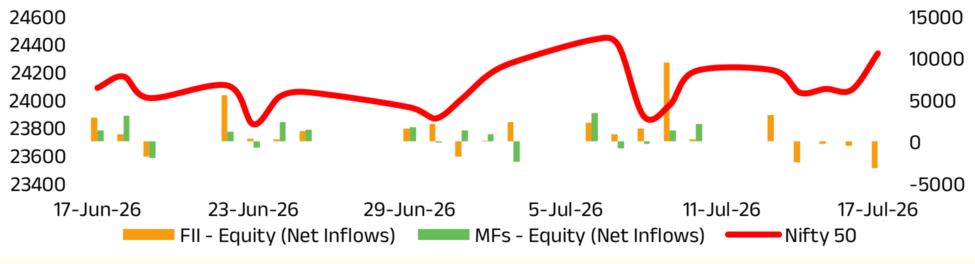
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-3179.96	11,897	11,897	-262,376
MF**	2075.44	5,525	5,525	299,969
DII	1017.89	21,074	21,074	484,965

Source: SEBI, NSDL;**As on 10th Jul 2026;

F&O Trends

	Latest	Previous	Change %
Near Futures	24321.70	24096.40	0.93%
Near Basis	-12.60	23.65	-153.28%
Mid Futures	24403.00	24190.60	0.88%
Mid Basis	68.70	117.85	-41.71%
Near Open Interest (Cr.)	1.46	1.54	-5.19%
Mid Open Interest (Cr.)	0.21	0.20	5.38%
Rollover (%)	14.94	13.60	9.80%
Put Call Ratio (OI)	1.42	0.97	46.74%
Put Call Ratio(Vol)	0.81	0.98	-17.80%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3654	1622	48724
Index Options	3809339	3850590	422595
Stock Futures	21171	19862	467914
Stock Options	22440	22886	90256
Total	3856604	3894959	1029489

Source: NSE

Global Equity Market

Global Indices	17-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4062.28	-0.99%	-1.53%	0.61%
Nasdaq 100 (U.S.)	28592.66	-1.49%	-4.13%	-3.63%
FTSE (U.K.)	10600.37	0.27%	0.98%	0.87%
DAX Index (Germany)	24830.98	-0.34%	-0.94%	-0.42%
CAC 40 Index (France)	8338.81	-0.47%	0.00%	-1.09%
SSE Composite (China)	3764.15	-3.05%	-5.81%	-8.37%
Nikkei (Japan)	64141.12	-4.03%	-6.44%	-8.24%
Kospi (South Korea)[1]	6820.60	-6.37%	-8.77%	-23.05%
HangSeng (Hong Kong)	24562.24	-1.78%	1.60%	1.03%
Strait Times (Singapore)	5509.43	-0.54%	0.73%	6.43%
Ibovespa Sao Paulo (Brazil)	173714.08	-0.06%	-2.33%	3.12%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8796.70	-0.50%	-0.11%	-1.89%
Jakarta Composite (Indonesia)	6175.53	1.10%	4.24%	-0.73%
KLSE (Malaysia)	1731.45	0.54%	2.36%	1.25%

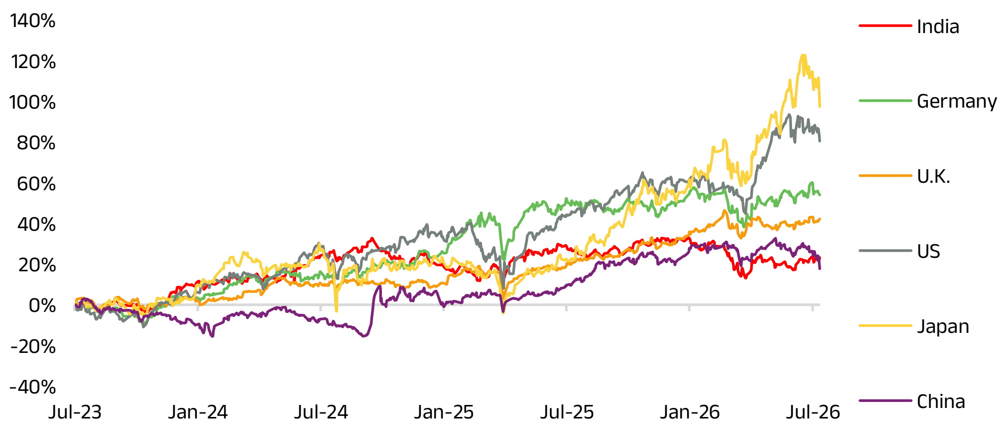
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	17-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	140,653	-0.58%	-1.46%	-6.07%
Gold ($/oz)	4,016.69	1.18%	-2.51%	-5.66%
Silver (INR/1 kg)	215,786	-1.02%	-2.16%	-12.84%
Silver ($/oz)	55.90	0.71%	-6.58%	-17.78%
Brent Crude($/bbl)	80.85	-0.14%	11.29%	-1.62%
Crude Oil (INR/1 bbl)	7,604.00	-0.72%	10.60%	5.58%
NYMEX Crude($/bbl)	83.33	4.25%	15.18%	3.64%
Natural Gas (INR/1 mmbtu)	275.30	-2.17%	-4.18%	-10.24%
Aluminium (INR/1 kg)	342.30	-0.64%	0.93%	-5.68%
Copper (INR/1 kg)	1,337.45	1.54%	2.47%	-0.78%
Nickel (INR/1 kg)	1,638.40	-0.65%	2.00%	-4.78%
Lead (INR/1 kg)	205.00	1.59%	-0.24%	-1.30%
Zinc (INR/1 kg)	378.15	-0.87%	-0.12%	1.29%
Mentha Oil (INR/1 kg)	1,341.10	0.32%	-3.79%	21.92%
Baltic Dry Index	2,752	-3.10%	-6.52%	3.73%

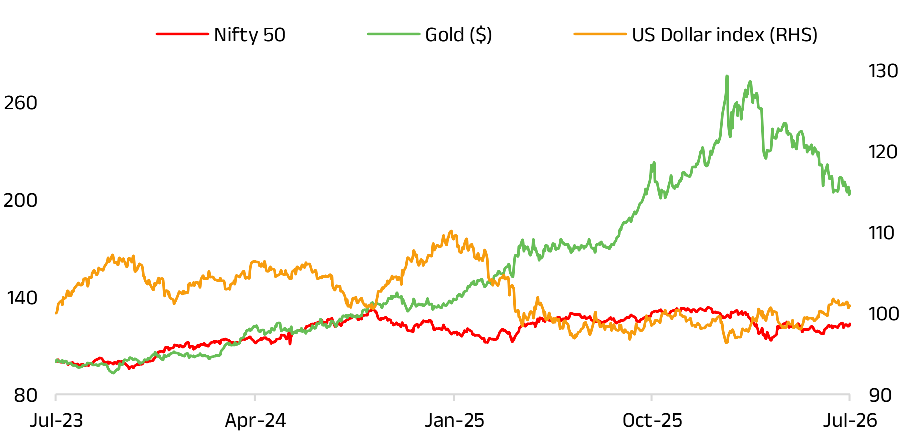
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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 company's sustainable competitive advantage that helps protect its business from competitors over an extended period. This advantage may arise from factors such as strong brands, cost leadership, intellectual property, network effects, or high customer switching costs, enabling the company to maintain its market position and profitability.

Explanation

The concept of an economic moat helps investors evaluate the long-term strength of a business. Companies with durable competitive advantages are often better positioned to defend market share, maintain customer loyalty, and withstand industry challenges. Understanding the source and sustainability of a moat can provide insight into a company's ability to create value over time. As a result, economic moats are an important consideration in fundamental equity analysis and long-term investing.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.50	-2.21	-0.88	10.47
Flexi Cap Fund	1.91	1.70	1.18	12.74
Mid Cap Fund	1.80	6.84	5.19	18.36
Large & Mid Cap Fund	1.79	2.63	2.03	14.89
Small Cap Fund	2.72	13.26	4.99	16.79
Multi Cap Fund	1.98	5.00	2.81	15.52
Focused Fund	2.09	1.81	1.95	12.76
Value Fund	1.25	1.11	1.59	14.34
Contra Fund	1.93	-2.17	-1.25	14.59
ELSS	1.48	1.58	0.16	12.87
Equity Savings	1.00	1.71	3.78	8.27
Arbitrage Fund	0.56	2.93	5.85	6.67
Dividend Yield Fund	0.65	-0.67	0.66	14.02
Aggressive Hybrid Fund	1.41	0.86	1.14	11.17
Balanced Advantage	1.15	0.48	1.28	9.29

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 16 Jul, 2026