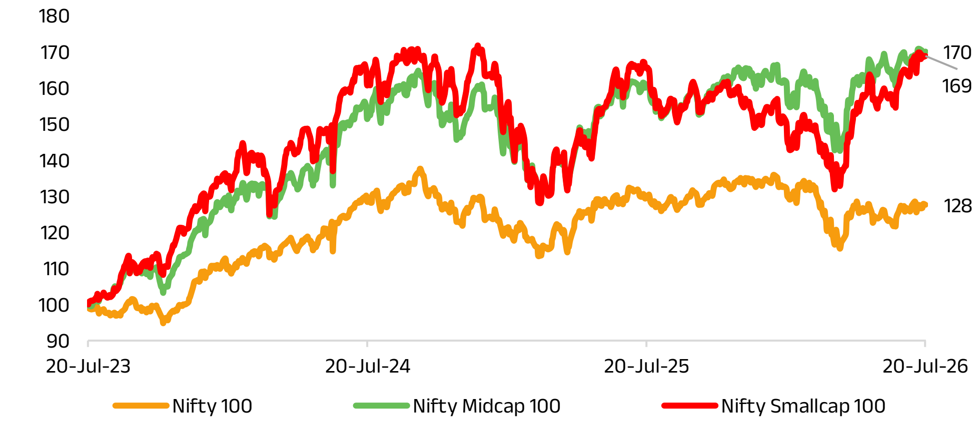
Daily Equity Market Pulse - July 21, 2026

Broad Indices Historical Movement



Source: NSE

Broad Indices

	20-Jul-26	1 Day	1 Week	1 Month
Nifty 50	24,238.50	-0.39%	0.11%	0.94%
Nifty 100	25,286.45	-0.16%	0.18%	0.80%
Nifty 200	14,012.65	-0.01%	0.07%	0.73%
Nifty 500	23,338.05	0.01%	-0.04%	0.84%
Nifty Large Midcap 250	16,711.80	0.17%	-0.09%	0.63%
Nifty Midcap 150	23,086.00	0.51%	-0.35%	0.49%
Nifty Next 50	72,460.05	0.88%	0.48%	0.14%
Nifty Smallcap 250	18,023.90	0.11%	-0.81%	1.75%

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

Smart Beta Index

Index	20-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,526.70	1.08%	-0.14%	-2.33%
NIFTY 500 Value 50	16,149.15	1.08%	0.26%	-2.32%
Nifty 200 Quality 30	20,243.45	0.63%	0.54%	0.94%
Nifty 50 Equal Weight	32,917.15	0.22%	0.28%	0.71%
NIFTY Alpha Low Volatility 30	27,000.75	0.89%	0.73%	2.67%
Nifty High Beta 50	4,450.30	0.13%	-0.66%	2.44%
Nifty Low Volatility 50	24,693.50	0.48%	0.37%	1.73%
Nifty Midcap150 Momentum 50	62,563.95	0.68%	-0.51%	-3.09%
Nifty PSE	10,029.60	0.92%	0.72%	-1.46%
Nifty SME Emerge	14,100.50	-0.29%	-0.01%	0.43%
Nifty 100 ESG	4,992.55	0.03%	0.43%	2.00%

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

Sector Indices

Index	20-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	27,028.35	-0.26%	0.17%	1.67%
Nifty Bank	57,945.00	-0.98%	-0.32%	0.45%
Nifty Consumption	11,761.40	0.48%	0.81%	1.20%
Nifty Financial	26,574.65	-1.22%	-0.97%	0.54%
Nifty FMCG	49,067.45	0.65%	0.53%	-0.99%
Nifty Healthcare	16,489.75	1.27%	1.19%	5.24%
Nifty IT	29,161.85	-0.22%	0.50%	6.33%
Nifty Media	1,538.05	1.09%	1.50%	1.49%
Nifty Metal	12,543.75	0.86%	-0.46%	-3.66%
Nifty MNC	32,618.60	0.37%	0.52%	-0.20%
Nifty Pharma	26,003.15	1.40%	1.40%	6.31%
Nifty Realty	917.50	-0.13%	-2.10%	13.01%
Nifty Energy	39,663.45	0.98%	1.13%	-2.18%

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

Nifty 50 Top 5 Gainers

Company	20-Jul-26	Prev_Day	% Change	1 Week
Power Grid	288.70	283.55	1.82	0.94
Bharti Airtel	1,940.10	1,908.80	1.64	2.01
Cipla	1,441.60	1,418.70	1.61	1.04
JSW Steel	1,257.00	1,237.30	1.59	1.58
NTPC	347.25	341.85	1.58	-1.28

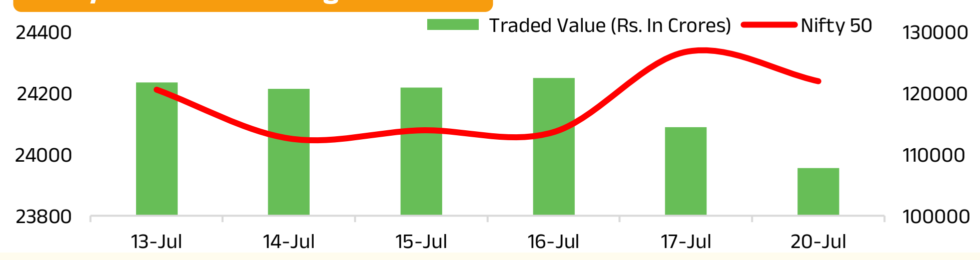
Source: NSE

Nifty 50 Top 5 Losers

Company	20-Jul-26	Prev_Day	% Change	1 Week
Axis Bank	1,256.00	1329	-5.46	-4.81
HDFC Bank	777.60	820	-5.12	-4.93
Maruti	13,514.00	13803	-2.09	-1.32
United Phos	606.05	617	-1.71	2.42
Infosys	1,087.10	1097	-0.86	-1.41

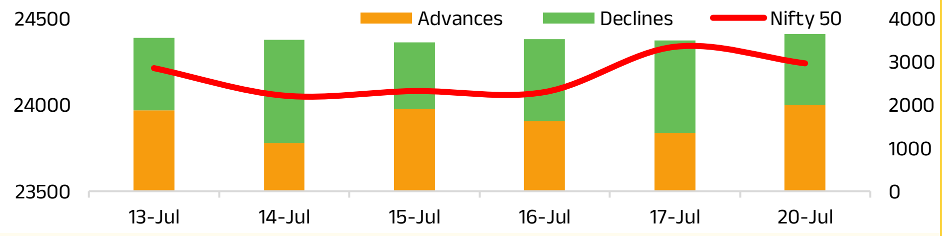
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

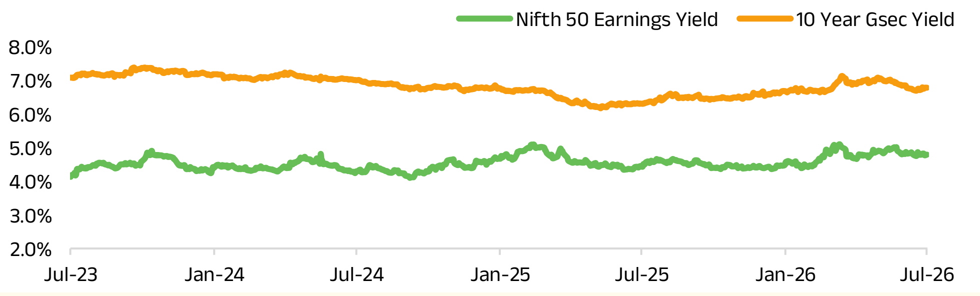
Indian equity markets declined due to rising crude oil prices following fresh tensions in the Middle East and weakness across Asian markets. Additionally, a sharp decline in banking stocks following their Q1FY27 earnings results put further pressure on the indices.

Larsen & Toubro (L&T) has secured multiple engineering, procurement, and construction (EPC) orders from leading domestic metals and mining companies, including contracts for an iron ore handling plant in Chhattisgarh, a steel plant expansion in West Bengal, and a zinc processing plant.

Prestige Estates Projects Ltd. launched three housing projects during the April–June quarter of FY26, with an estimated revenue potential of Rs. 12,000 crore, as part of its expansion strategy amid strong housing demand.

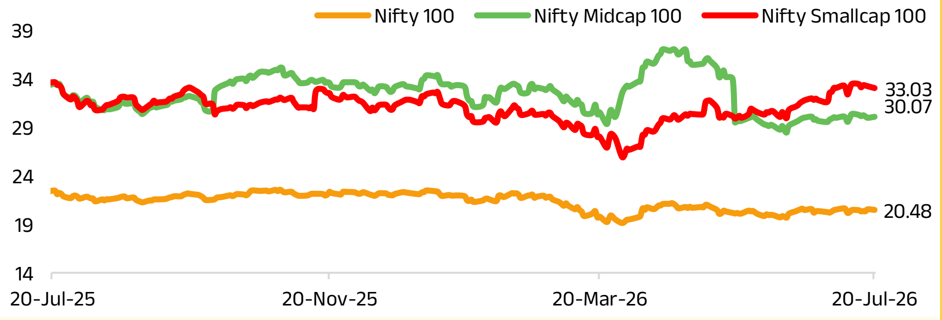
Trent Ltd., a Tata Group company, is aiming to expand its premium apparel brand Westside by opening up to 100 new stores annually, double its current pace, to reinvigorate growth.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



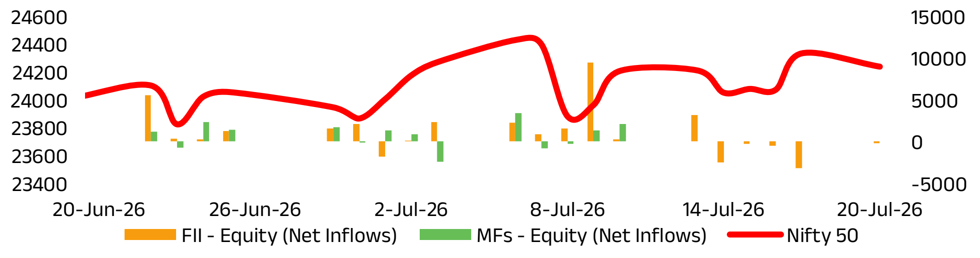
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	-215.71	11,682	11,682	-262,591
MF**	2075.44	5,525	5,525	299,969
DII	1312.03	22,386	22,386	486,277

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

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Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	24259.50	24321.70	-0.26%
Near Basis	21.00	-12.60	-266.67%
Mid Futures	24352.50	24403.00	-0.21%
Mid Basis	114.00	68.70	65.94%
Near Open Interest (Cr.)	1.41	1.46	-3.59%
Mid Open Interest (Cr.)	0.22	0.21	4.28%
Rollover (%)	15.79	14.94	5.69%
Put Call Ratio (OI)	1.28	1.42	-10.33%
Put Call Ratio(Vol)	0.92	0.81	13.74%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	7535	2138	45518
Index Options	1249618	1243321	521243
Stock Futures	25863	24946	467719
Stock Options	27894	27752	96704
Total	1310911	1298157	1131184

Source: NSE

Global Equity Market

Global Indices	20-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)[1]	4062.28	-0.99%	-0.75%	-0.47%
Nasdaq 100 (U.S.)[1]	28592.66	-1.49%	-2.29%	-5.96%
FTSE (U.K.)[1]	10600.37	0.27%	0.97%	2.29%
DAX Index (Germany)[1]	24830.98	-0.34%	-1.13%	-0.62%
CAC 40 Index (France)[1]	8338.81	-0.47%	-0.31%	-0.98%
SSE Composite (China)	3796.28	0.85%	-3.00%	-7.19%
Nikkei (Japan)[1]	64141.12	-4.03%	-4.61%	-9.98%
Kospi (South Korea)	6516.27	-4.46%	-4.27%	-28.02%
HangSeng (Hong Kong)	25143.05	2.36%	3.84%	5.09%
Strait Times (Singapore)	5498.95	-0.19%	0.52%	5.90%
Ibovespa Sao Paulo (Brazil)[1]	173714.08	-0.06%	-1.15%	3.20%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8791.30	-0.06%	-0.20%	-0.42%
Jakarta Composite (Indonesia)	6231.78	0.91%	3.21%	0.88%
KLSE (Malaysia)	1722.29	-0.53%	1.40%	0.60%

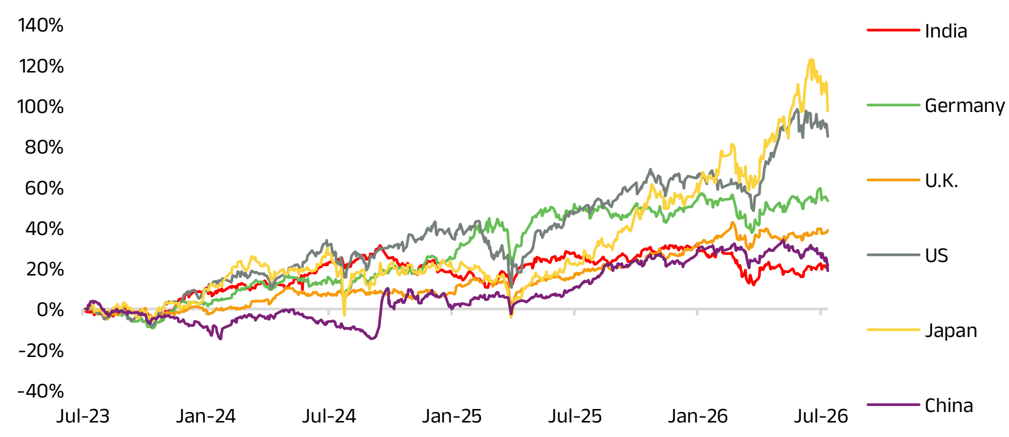
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	20-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	141,802	0.82%	0.06%	-1.94%
Gold ($/oz)	4,005.71	-0.27%	0.13%	-3.71%
Silver (INR/1 kg)	219,513	1.73%	0.49%	-5.31%
Silver ($/oz)	56.41	0.92%	-2.13%	-13.07%
Brent Crude($/bbl)	82.30	1.79%	7.88%	2.41%
Crude Oil (INR/1 bbl)	7,949.00	4.54%	16.79%	10.07%
NYMEX Crude($/bbl)	84.28	1.14%	6.55%	5.22%
Natural Gas (INR/1 mmbtu)	280.50	1.89%	0.11%	-7.97%
Aluminium (INR/1 kg)	342.90	0.18%	0.51%	-4.59%
Copper (INR/1 kg)	1,331.15	-0.47%	1.82%	0.07%
Nickel (INR/1 kg)	1,651.20	0.78%	2.78%	-3.34%
Lead (INR/1 kg)	204.35	-0.32%	0.05%	-1.04%
Zinc (INR/1 kg)	379.95	0.48%	0.21%	1.86%
Mentha Oil (INR/1 kg)	1,396.50	4.13%	5.84%	27.90%
Baltic Dry Index	2,671	-2.94%	-9.76%	-1.87%

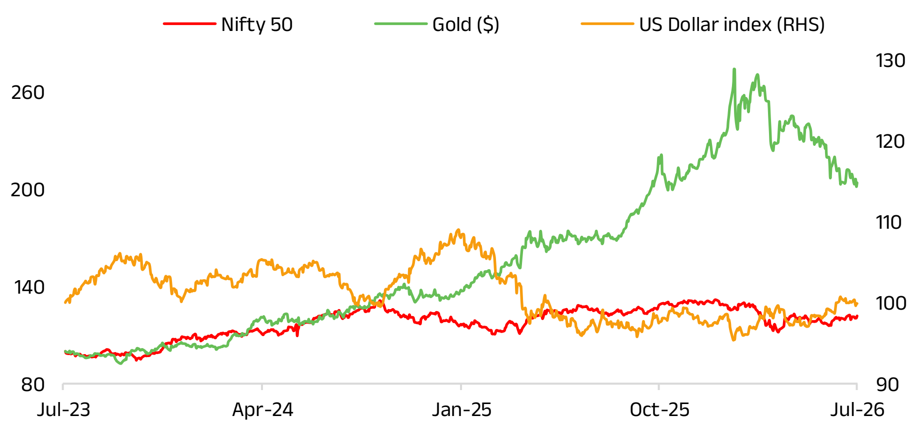
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	1.27	-0.36	-0.34	10.04
Flexi Cap Fund	1.45	4.09	1.88	12.44
Mid Cap Fund	1.13	10.30	6.19	18.31
Large & Mid Cap Fund	1.17	5.34	2.84	14.62
Small Cap Fund	1.74	17.70	6.02	16.77
Multi Cap Fund	1.26	7.87	3.52	15.23
Focused Fund	1.49	4.09	2.55	12.39
Value Fund	0.86	3.51	2.20	13.94
Contra Fund	1.70	0.31	-0.48	14.29
ELSS	0.95	4.19	0.72	12.55
Equity Savings	0.82	2.28	3.86	8.09
Arbitrage Fund	0.48	2.80	5.74	6.62
Dividend Yield Fund	0.63	1.43	1.22	13.70
Aggressive Hybrid Fund	1.04	2.62	1.55	10.87
Balanced Advantage	0.94	1.79	1.60	9.07

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 17 Jul, 2026