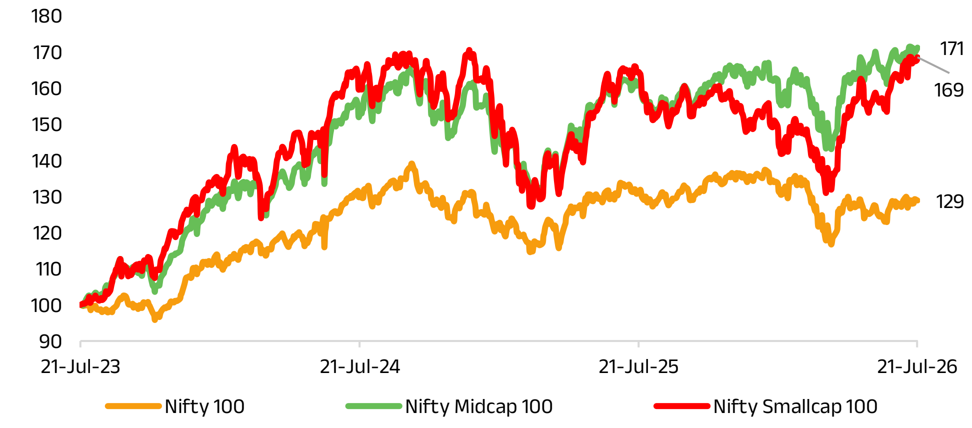
Daily Equity Market Pulse - July 22, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	21-Jul-26	1 Day	1 Week	1 Month
Nifty 50	24,187.70	-0.21%	0.56%	0.73%
Nifty 100	25,263.45	-0.09%	0.70%	0.70%
Nifty 200	14,010.75	-0.01%	0.63%	0.72%
Nifty 500	23,352.15	0.06%	0.66%	0.90%
Nifty Large Midcap 250	16,734.75	0.14%	0.60%	0.77%
Nifty Midcap 150	23,170.50	0.37%	0.51%	0.86%
Nifty Next 50	72,777.10	0.44%	1.29%	0.58%
Nifty Smallcap 250	18,101.00	0.43%	0.70%	2.19%

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

Smart Beta Index

Index	21-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,717.40	0.62%	0.13%	-1.72%
NIFTY 500 Value 50	16,194.15	0.28%	1.23%	-2.05%
Nifty 200 Quality 30	20,229.35	-0.07%	1.36%	0.86%
Nifty 50 Equal Weight	32,956.40	0.12%	1.13%	0.83%
NIFTY Alpha Low Volatility 30	27,143.95	0.53%	1.68%	3.21%
Nifty High Beta 50	4,457.00	0.15%	0.72%	2.59%
Nifty Low Volatility 50	24,695.55	0.01%	0.83%	1.74%
Nifty Midcap150 Momentum 50	62,832.60	0.43%	0.09%	-2.67%
Nifty PSE	10,044.60	0.15%	1.23%	-1.32%
Nifty SME Emerge	14,084.35	-0.11%	-0.31%	0.31%
Nifty 100 ESG	4,996.05	0.07%	1.12%	2.07%

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

Sector Indices

Index	21-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	27,280.60	0.93%	2.76%	2.62%
Nifty Bank	57,835.35	-0.19%	0.65%	0.26%
Nifty Consumption	11,799.80	0.33%	1.62%	1.53%
Nifty Financial	26,531.65	-0.16%	-0.02%	0.38%
Nifty FMCG	48,917.20	-0.31%	0.81%	-1.29%
Nifty Healthcare	16,547.50	0.35%	0.65%	5.61%
Nifty IT	28,984.40	-0.61%	0.90%	5.68%
Nifty Media	1,537.40	-0.04%	1.77%	1.45%
Nifty Metal	12,623.30	0.63%	-0.43%	-3.05%
Nifty MNC	32,695.65	0.24%	1.28%	0.03%
Nifty Pharma	26,092.85	0.34%	0.72%	6.67%
Nifty Realty	927.35	1.07%	0.95%	14.22%
Nifty Energy	39,587.25	-0.19%	0.98%	-2.37%

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

Nifty 50 Top 5 Gainers

Company	21-Jul-26	Prev_Day	% Change	1 Week
IndusInd Bank	1,063.45	1,032.85	2.96	6.63
United Phos	618.15	606.05	2.00	4.21
Eicher Motors Limited	7,689.50	7,563.50	1.67	5.63
Ultratech Cem	12,094.00	11,903.00	1.60	5.20
HCL Tech	1,239.50	1,221.30	1.49	6.24

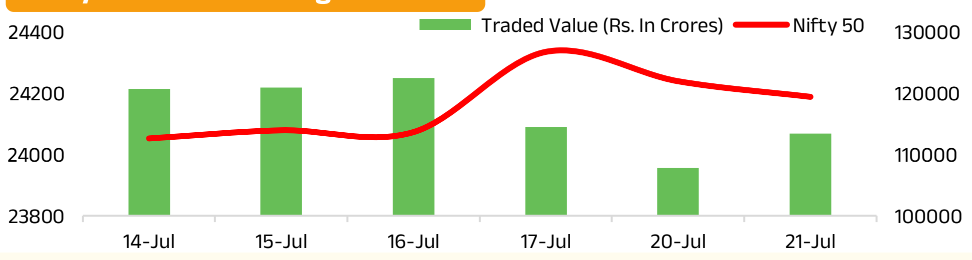
Source: NSE

Nifty 50 Top 5 Losers

Company	21-Jul-26	Prev_Day	% Change	1 Week
HDFC Bank	761.45	778	-2.08	-5.92
SBI	1,044.40	1060	-1.47	2.86
RIL	1,303.70	1323	-1.47	0.83
TCS	2,221.10	2251	-1.33	0.93
Infosys	1,073.50	1087	-1.25	-1.78

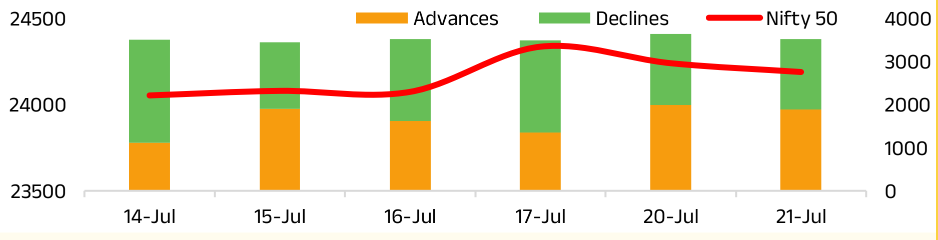
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

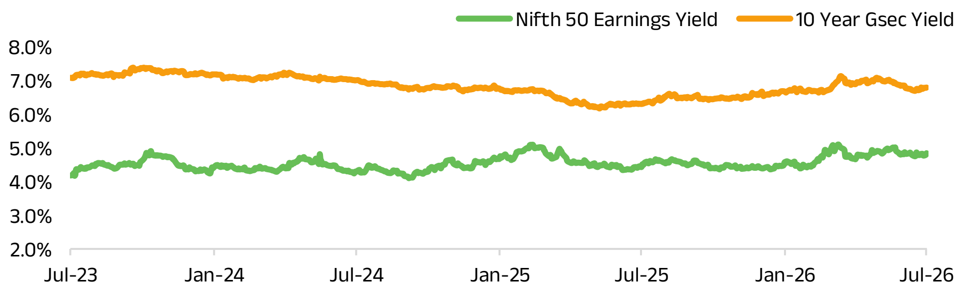
Indian equity markets closed lower as rising crude oil prices weighed on sentiment, despite hopes that the U.S. and Iran would resume peace negotiations. Reports indicated that the U.S. President is nearing a decision between a 10-day ceasefire to facilitate the reopening of the Strait of Hormuz and a coordinated U.S.-Israeli campaign against Iran.

Bajaj Auto's consolidated net profit attributable to owners of the company rose 45.9% YoY to Rs. 3,225.63 crore in the quarter ended Jun 30, 2026, from Rs. 2,210.44 crore. Revenue increased sharply, though the company said the figures were not comparable with earlier periods following a change in the scope of consolidation.

Samsung Biologics Co. agreed to acquire Switzerland's PolyPeptide Group AG in an all-cash deal that values the contract drugmaker's equity at about 1.46 billion Swiss francs ($1.8 billion), expanding its manufacturing capabilities.

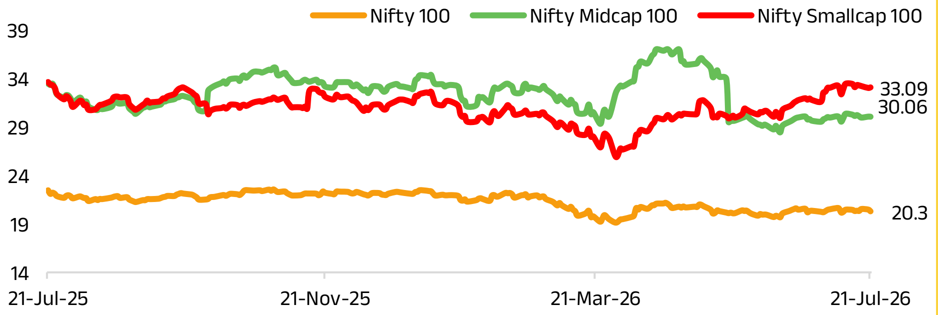
Diversified group Eleven said it plans to invest over Rs 4,700 crore to build a proposed renewable-led electricity distribution network across Gurugram and Nuh districts of Haryana. The capital for the first phase is fully locked in, with the equity infused and the complete funding mix of equity and debt in place.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



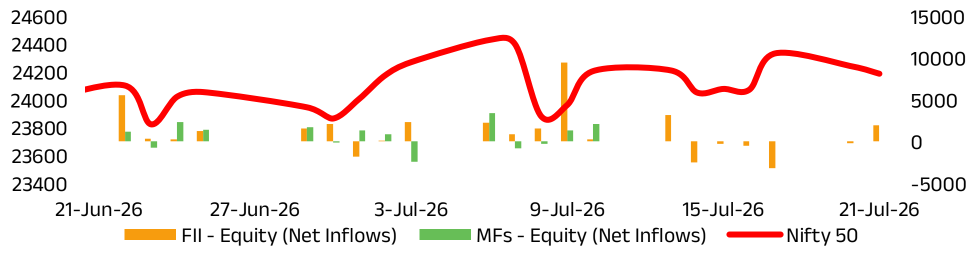
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1928.03	13,610	13,610	-260,663
MF**	2075.44	5,525	5,525	299,969
DII	-656.88	21,729	21,729	485,621

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

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F&O Trends

	Latest	Previous	Change %
Near Futures	24180.60	24259.50	-0.33%
Near Basis	-7.10	21.00	-133.81%
Mid Futures	24275.20	24352.50	-0.32%
Mid Basis	87.50	114.00	-23.25%
Near Open Interest (Cr.)	1.43	1.41	1.61%
Mid Open Interest (Cr.)	0.23	0.22	6.79%
Rollover (%)	16.40	15.79	3.89%
Put Call Ratio (OI)	0.91	1.28	-28.98%
Put Call Ratio(Vol)	0.98	0.92	6.74%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2396	3029	44268
Index Options	1537390	1549074	513782
Stock Futures	23001	22555	467319
Stock Options	34850	34619	102690
Total	1597637	1609277	1128060

Source: NSE

Global Equity Market

Global Indices	21-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4087.99	0.87%	-0.49%	0.16%
Nasdaq 100 (U.S.)	29155.18	1.93%	-1.46%	-4.11%
FTSE (U.K.)	10585.91	0.58%	0.54%	2.15%
DAX Index (Germany)	25011.35	0.66%	-0.54%	0.10%
CAC 40 Index (France)	8363.14	0.28%	-0.04%	-0.69%
SSE Composite (China)	3864.37	1.79%	-2.59%	-5.53%
Nikkei (Japan)	66232.19	3.26%	-2.23%	-7.04%
Kospi (South Korea)	6747.95	3.56%	-1.59%	-25.46%
HangSeng (Hong Kong)	25132.29	-0.04%	3.25%	5.05%
Strait Times (Singapore)	5526.72	0.51%	0.57%	6.43%
Ibovespa Sao Paulo (Brazil)	173325.65	-0.03%	-1.88%	2.97%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8793.30	0.02%	-0.17%	-0.40%
Jakarta Composite (Indonesia)	6340.02	1.74%	4.98%	2.64%
KLSE (Malaysia)	1720.37	-0.11%	0.03%	0.49%

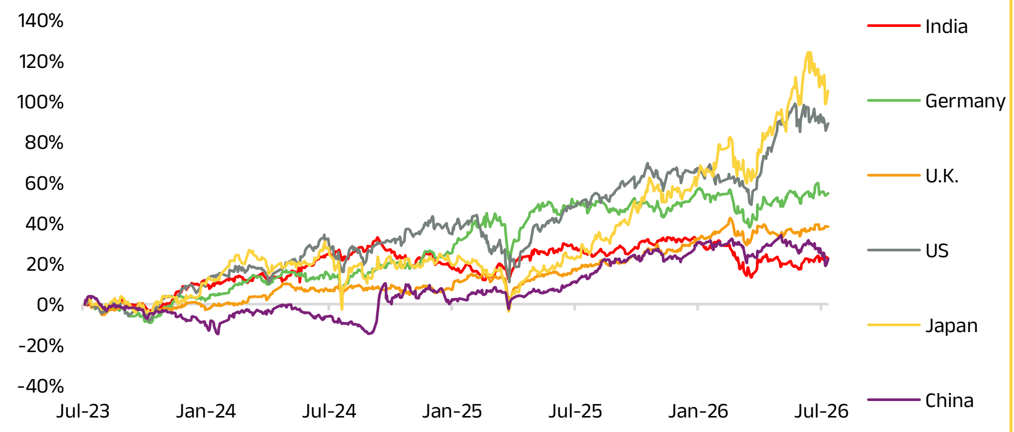
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	21-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	142,760	0.68%	1.16%	-1.28%
Gold ($/oz)	4,076.29	1.76%	0.55%	-2.01%
Silver (INR/1 kg)	223,667	1.89%	1.98%	-3.52%
Silver ($/oz)	58.78	4.20%	0.27%	-9.42%
Brent Crude($/bbl)	86.62	5.25%	8.05%	7.79%
Crude Oil (INR/1 bbl)	8,033.00	1.06%	7.28%	11.23%
NYMEX Crude($/bbl)	85.94	1.97%	6.97%	7.29%
Natural Gas (INR/1 mmbtu)	276.00	-1.60%	-0.58%	-9.45%
Aluminium (INR/1 kg)	344.20	0.38%	-0.13%	-4.23%
Copper (INR/1 kg)	1,343.00	0.89%	1.43%	0.96%
Nickel (INR/1 kg)	1,657.50	0.38%	2.47%	-2.97%
Lead (INR/1 kg)	202.70	-0.81%	0.50%	-1.84%
Zinc (INR/1 kg)	381.20	0.33%	-0.17%	2.20%
Mentha Oil (INR/1 kg)	1,392.10	-0.32%	5.70%	27.49%
Baltic Dry Index	2,670	-0.04%	-10.40%	-1.91%

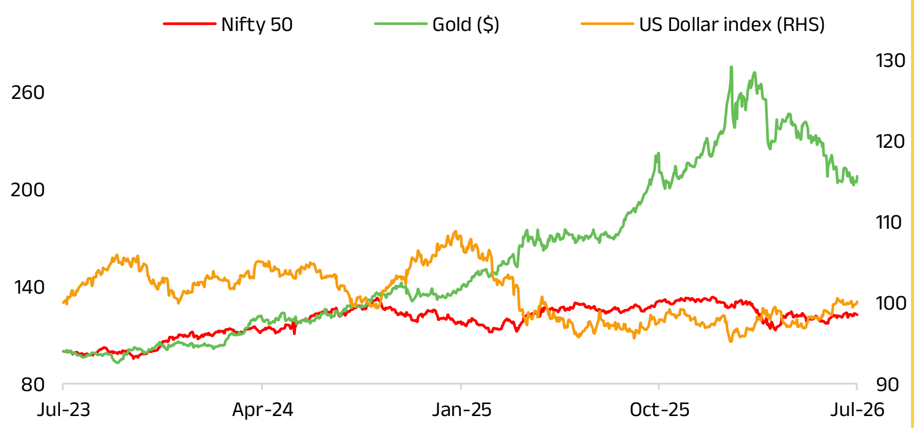
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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 market position and profitability over time. These advantages may arise from strong brands, cost leadership, intellectual property, network effects, customer relationships, or efficient distribution capabilities, making it difficult for competitors to replicate the company's strengths.

Explanation

The concept of an Economic Moat helps investors assess the long-term durability of a business. Companies with strong competitive advantages are often better positioned to defend their market share and maintain profitability despite competitive pressures. A durable moat can support business stability, strengthen customer loyalty, and enhance strategic flexibility. Understanding this concept encourages investors to look beyond short-term performance and evaluate the underlying quality and resilience of a company's business model.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	1.28	0.01	-0.88	10.36
Flexi Cap Fund	1.59	4.77	1.48	12.73
Mid Cap Fund	1.56	11.62	6.11	18.64
Large & Mid Cap Fund	1.38	6.12	2.48	14.93
Small Cap Fund	2.14	19.00	6.43	16.95
Multi Cap Fund	1.55	8.87	3.74	15.50
Focused Fund	1.67	4.85	2.15	12.70
Value Fund	0.90	4.07	1.99	14.17
Contra Fund	1.82	0.94	-0.71	14.63
ELSS	1.12	4.99	0.55	12.80
Equity Savings	0.87	2.48	3.74	8.19
Arbitrage Fund	0.55	2.86	5.82	6.64
Dividend Yield Fund	0.75	2.01	1.08	14.00
Aggressive Hybrid Fund	1.10	3.10	1.23	11.08
Balanced Advantage	1.05	2.20	1.38	9.28

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.