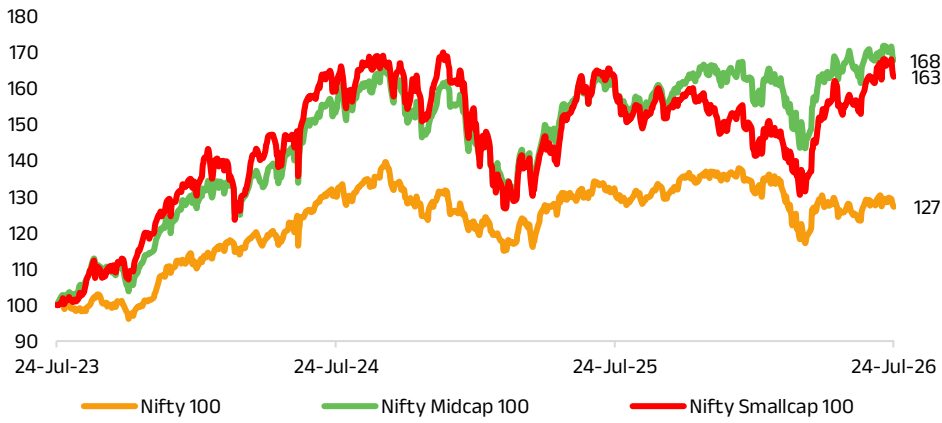


Broad Indices Historical Movement



Source: NSE

Broad Indices

	24-Jul-26	1 Day	1 Week	1 Month
Nifty 50	23,767.45	-0.43%	-2.33%	-1.06%
Nifty 100	24,840.75	-0.37%	-1.92%	-0.94%
Nifty 200	13,762.40	-0.31%	-1.80%	-0.91%
Nifty 500	22,913.30	-0.30%	-1.81%	-0.92%
Nifty Large Midcap 250	16,419.45	-0.23%	-1.58%	-0.89%
Nifty Midcap 150	22,685.25	-0.09%	-1.23%	-0.82%
Nifty Next 50	71,766.00	-0.10%	-0.09%	-0.41%
Nifty Smallcap 250	17,601.20	-0.28%	-2.23%	-1.03%

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

Smart Beta Index

Index	24-Jul-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,058.40	-0.57%	-0.47%	-3.56%
NIFTY 500 Value 50	15,898.65	-0.18%	-0.49%	-2.77%
Nifty 200 Quality 30	20,156.20	0.12%	0.19%	1.90%
Nifty 50 Equal Weight	32,501.10	-0.42%	-1.05%	-0.15%
NIFTY Alpha Low Volatility 30	26,883.00	-0.53%	0.45%	1.98%
Nifty High Beta 50	4,317.25	-0.33%	-2.87%	0.09%
Nifty Low Volatility 50	24,512.45	-0.18%	-0.25%	0.77%
Nifty Midcap150 Momentum 50	61,469.80	-0.19%	-1.08%	-3.86%
Nifty PSE	9,952.30	-0.26%	0.14%	-1.36%
Nifty SME Emerge	13,928.15	-0.29%	-1.51%	-1.11%
Nifty 100 ESG	4,921.00	-0.40%	-1.41%	0.71%

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

Sector Indices

Index	24-Jul-26	1 Day	1 Week	1 Month
Nifty Auto	27,217.95	-1.10%	0.44%	3.16%
Nifty Bank	56,693.50	0.18%	-3.12%	-2.51%
Nifty Consumption	11,700.15	-0.74%	-0.04%	1.66%
Nifty Financial	25,909.90	-0.32%	-3.69%	-3.09%
Nifty FMCG	49,053.30	0.04%	0.62%	-0.06%
Nifty Healthcare	16,236.25	-0.36%	-0.29%	1.77%
Nifty IT	28,767.95	0.82%	-1.57%	4.36%
Nifty Media	1,527.45	1.86%	0.39%	0.54%
Nifty Metal	12,401.55	-0.55%	-0.28%	-1.72%
Nifty MNC	32,360.75	-0.26%	-0.42%	0.35%
Nifty Pharma	25,548.15	-0.41%	-0.38%	2.12%
Nifty Realty	881.80	-0.55%	-4.02%	7.07%
Nifty Energy	38,821.80	-0.57%	-1.16%	-2.72%

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

Nifty 50 Top 5 Gainers

Company	24-Jul-26	Prev_Day	% Change	1 Week
HCL Tech	1,271.00	1,244.70	2.11	5.57
Wipro	177.12	174.82	1.32	0.64
Cipla	1,410.60	1,393.00	1.26	-0.57
ITC	283.45	281.30	0.76	0.98
HDFC Standard Life Insurance C	555.05	550.95	0.74	-1.53

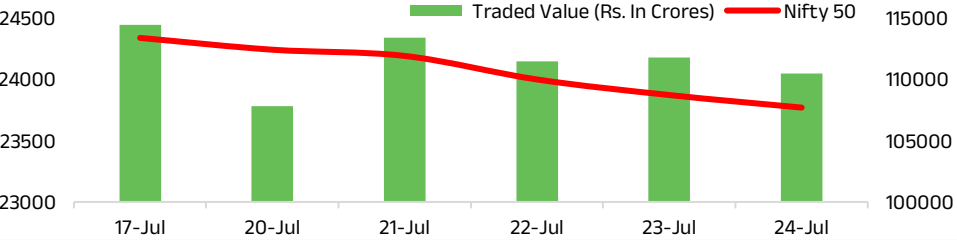
Source: NSE

Nifty 50 Top 5 Losers

Company	24-Jul-26	Prev_Day	% Change	1 Week
Hero Moto	5,011.10	5174	-3.14	2.06
M&M	3,161.40	3230	-2.11	-0.56
Tata Beverages	1,088.00	1108	-1.78	-0.06
Bharti Airtel	1,898.20	1931	-1.70	-0.56
ONGC	248.76	252	-1.43	0.59

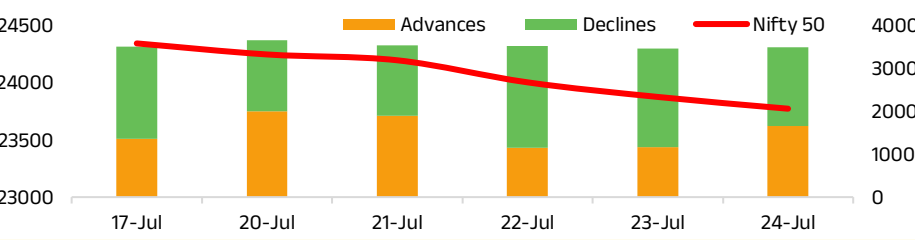
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

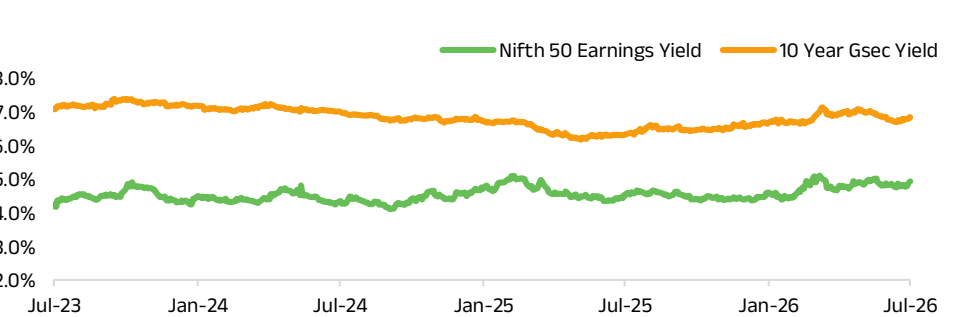
Indian equity markets extended their losses for a fifth consecutive session, weighed down by escalating tensions in the Middle East that disrupted key crude oil shipping routes. Sentiment was further dampened after the U.S. administration imposed a 10% tariff on Indian imports, citing concerns over forced labor practices.

HCLTech announced plans to establish its first AI data center at the upcoming Odisha Sovereign AI Park in Bhubaneswar. In a filing with the BSE, the company said the AI data center will be developed through a tripartite partnership involving AI startup Sarvam and the Odisha government.

Sona Comstar reported a 47% YoY increase in consolidated profit after tax (PAT) to Rs 178.51 crore for the June quarter of FY27. The company had posted a consolidated PAT of Rs 121.70 crore in the corresponding quarter of FY26.

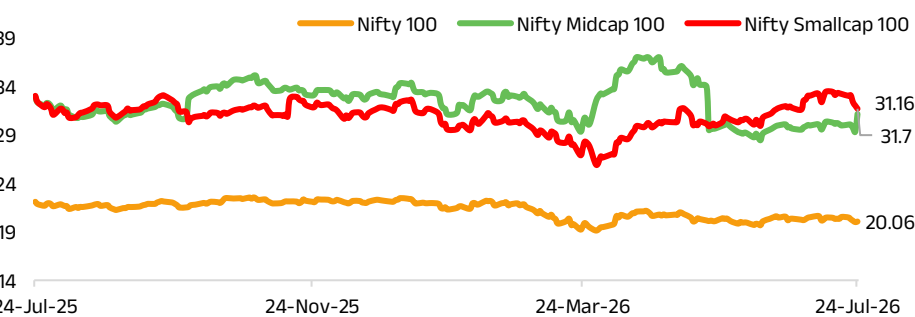
Hindalco Industries plans to invest Rs 50,000 crore in India over the next three years across its upstream and downstream businesses. The company is also evaluating an additional Rs 50,000 crore worth of growth opportunities, creating a potential investment pipeline of Rs 1 lakh crore.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



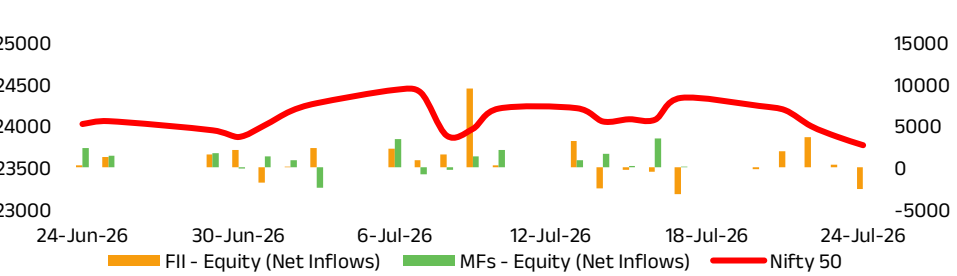
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	YTD
FII	-2607.28	14,946	14,946	-259,327
MF**	63.58	11,769	11,769	306,213
DII	5453.55	29,712	29,712	493,603

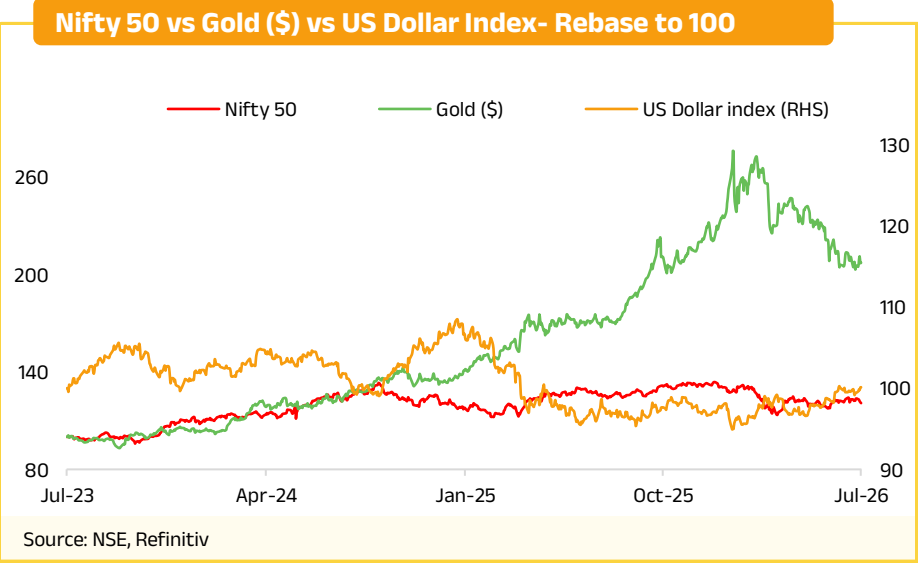
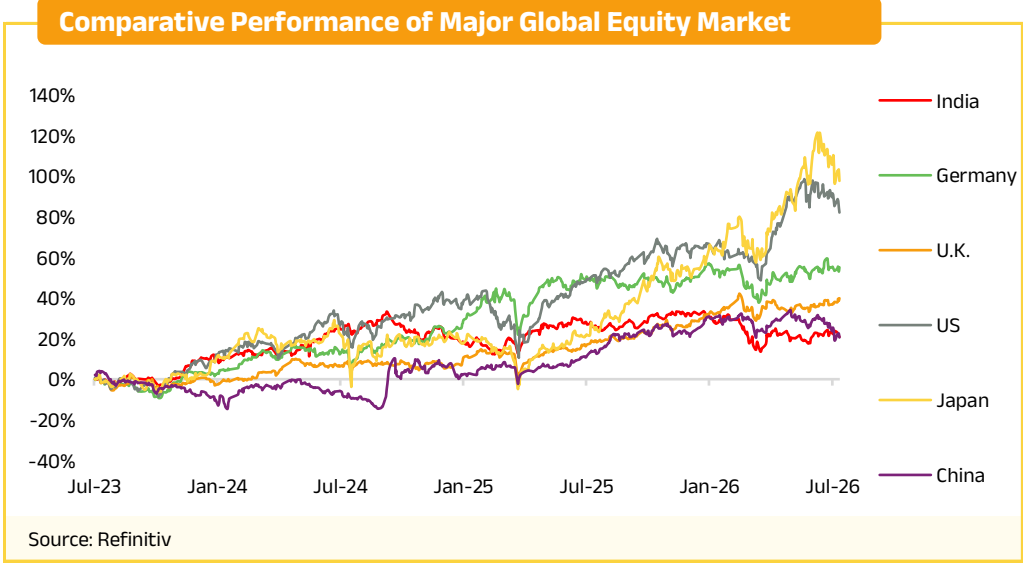
Source: SEBI, NSDL;**As on 17th Jul 2026;

F&O Trends			
	Latest	Previous	Change %
Near Futures	23806.50	23873.60	-0.28%
Near Basis	39.05	4.00	876.25%
Mid Futures	23874.60	23934.20	-0.25%
Mid Basis	107.15	64.60	65.87%
Near Open Interest (Cr.)	1.03	1.18	-13.06%
Mid Open Interest (Cr.)	0.82	0.60	36.40%
Rollover (%)	46.73	36.20	29.10%
Put Call Ratio (OI)	0.89	0.80	11.98%
Put Call Ratio(Vol)	0.92	0.93	-0.73%
Source: NSE			

FII Derivative Trade Statistics			
	Buy	Sell	Open Int.
Index Futures	7931	9770	49900
Index Options	3734908	3786862	510191
Stock Futures	151259	149077	459070
Stock Options	37766	36420	98655
Total	3931864	3982129	1117816
Source: NSE			

Global Equity Market				
Global Indices	24-Jul-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4035.71	0.06%	-0.65%	0.65%
Nasdaq 100 (U.S.)	28128.34	-1.15%	-1.62%	-3.74%
FTSE (U.K.)	10736.23	0.91%	1.28%	2.62%
DAX Index (Germany)	25099.00	1.36%	1.08%	1.45%
CAC 40 Index (France)	8372.28	0.88%	0.40%	-0.16%
SSE Composite (China)	3814.20	-1.61%	1.33%	-7.22%
Nikkei (Japan)	64611.15	-2.73%	0.73%	-6.60%
Kospi (South Korea)	6690.62	-5.72%	-1.91%	-21.02%
HangSeng (Hong Kong)	24963.23	-0.98%	1.63%	6.62%
Strait Times (Singapore)	5588.34	0.12%	1.43%	7.14%
Ibovespa Sao Paulo (Brazil)	174041.95	-1.52%	0.19%	2.07%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8772.30	-0.75%	-0.28%	-0.41%
Jakarta Composite (Indonesia)	6196.43	-1.88%	0.34%	5.31%
KLSE (Malaysia)	1701.02	-0.79%	-1.76%	1.12%
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				

Global & Domestic Commodity Market				
Commodity Prices	24-Jul-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	143,238	-0.59%	1.84%	0.51%
Gold (\$/oz)	4,052.56	0.13%	0.89%	1.30%
Silver (INR/1 kg)	222,824	0.05%	3.26%	-0.42%
Silver (\$/oz)	58.16	0.85%	4.05%	1.27%
Brent Crude(\$/bbl)	102.80	4.43%	27.15%	44.89%
Crude Oil (INR/1 bbl)	8,900.00	6.24%	17.04%	28.37%
NYMEX Crude(\$/bbl)	91.54	-1.55%	9.85%	28.35%
Natural Gas (INR/1 mmbtu)	281.50	-0.25%	2.25%	-5.54%
Aluminium (INR/1 kg)	344.65	-0.63%	0.69%	1.37%
Copper (INR/1 kg)	1,334.50	0.02%	-0.22%	3.09%
Nickel (INR/1 kg)	1,687.50	-0.20%	3.00%	2.86%
Lead (INR/1 kg)	204.70	0.24%	-0.15%	-1.21%
Zinc (INR/1 kg)	385.55	-1.06%	1.96%	6.74%
Mentha Oil (INR/1 kg)	1,386.30	1.28%	3.37%	26.03%
Baltic Dry Index	2,743	0.66%	-0.33%	4.14%
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.				



Term of the Day



Return on Equity (ROE)

Definition: Return on Equity (ROE) is a financial measure that indicates how effectively a company uses shareholders’ capital to generate profits. It provides insight into management’s ability to create value from the funds invested by owners and is widely used to assess a company’s operational efficiency and profitability.



Explanation

ROE is an important metric for understanding how efficiently a business utilizes shareholder capital. A consistently healthy ROE may reflect strong management execution, efficient operations, and effective capital allocation. However, ROE should not be viewed in isolation, as it can be influenced by factors such as financing decisions and business structure. Investors often use it alongside other measures to gain a more comprehensive view of a company’s financial quality and long-term performance potential.

Mutual Fund Category Performance - Equity & Hybrid				
Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	-0.52	-1.14	-2.43	9.79
Flexi Cap Fund	-0.42	3.58	-0.08	12.07
Mid Cap Fund	-0.48	9.88	4.38	17.76
Large & Mid Cap Fund	-0.60	4.66	0.61	14.16
Small Cap Fund	-0.39	17.35	4.87	16.06
Multi Cap Fund	-0.61	7.46	2.11	14.69
Focused Fund	-0.48	3.63	0.36	11.99
Value Fund	-1.25	2.54	0.39	13.41
Contra Fund	-0.50	-0.69	-2.62	13.80
ELSS	-0.79	3.78	-1.06	12.12
Equity Savings	0.15	1.96	3.31	7.98
Arbitrage Fund	0.48	2.81	5.78	6.63
Dividend Yield Fund	-0.67	0.73	0.11	13.47
Aggressive Hybrid Fund	-0.46	2.15	-0.07	10.59
Balanced Advantage	-0.28	1.33	0.32	8.85
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.				