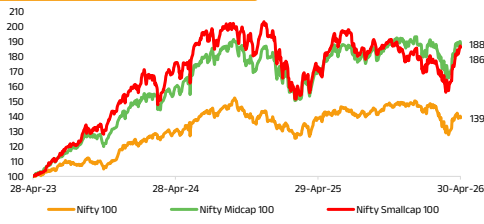


Broad Indices Historical Movement



Source: NSE

Broad Indices

	30-Apr-26	1 Day	1 Week	1 Month
Nifty 50	23,997.55	-0.74%	0.42%	5.81%
Nifty 100	24,896.00	-0.84%	0.28%	6.97%
Nifty 200	13,705.55	-0.86%	0.36%	7.75%
Nifty 500	22,683.55	-0.82%	0.50%	8.35%
Nifty Large Midcap -cn	16,181.90	-0.90%	0.43%	8.86%
Nifty Midcap 150	22,000.05	-0.96%	0.57%	10.72%
Nifty Next 50	69,643.90	-1.24%	-0.34%	12.49%
Nifty Smallcap 250	16,731.20	-0.44%	1.93%	13.44%

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

Smart Beta Index

Index	30-Apr-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,157.90	-0.83%	-0.73%	8.60%
NIFTY 500 Value 50	16,554.20	-1.38%	0.29%	8.77%
Nifty 200 Quality 30	20,153.90	-0.48%	0.89%	8.13%
Nifty 50 Equal Weight	32,264.45	-0.80%	0.47%	7.53%
NIFTY Alpha Low Volatility 30	25,710.15	-0.61%	0.24%	6.41%
Nifty High Beta 50	4,074.80	-1.14%	1.14%	17.88%
Nifty Low Volatility 50	24,173.95	-0.69%	0.13%	6.05%
Nifty Midcap150 Momentum 5i	61,128.35	-0.96%	-0.27%	9.57%
Nifty PSE	10,629.05	-0.88%	0.30%	9.58%
Nifty SME Emerge	13,901.85	-0.01%	1.78%	19.17%
Nifty 100 ESG	4,834.30	-0.86%	-0.27%	6.83%

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

Sector Indices

Index	30-Apr-26	1 Day	1 Week	1 Month
Nifty Auto	25,917.60	-0.64%	1.03%	6.93%
Nifty Bank	54,863.35	-0.98%	-2.19%	6.64%
Nifty Consumption	11,417.30	-0.89%	0.71%	8.27%
Nifty Financial	25,657.35	-0.99%	-1.85%	6.99%
Nifty FMCG	51,072.10	-1.35%	0.60%	10.70%
Nifty Healthcare	14,918.40	-0.15%	2.39%	6.14%
Nifty IT	29,353.90	0.37%	2.89%	-1.06%
Nifty Metals	1,456.00	-0.52%	1.20%	11.28%
Nifty Media	12,833.05	-2.12%	0.68%	12.45%
Nifty MNC	31,886.60	-0.91%	0.66%	12.79%
Nifty Pharma	23,267.70	0.03%	3.05%	5.71%
Nifty Realty	793.55	-1.50%	2.00%	19.33%
Nifty Energy	40,771.90	-0.46%	2.18%	15.17%

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

Nifty 50 Top 5 Gainers

Company	30-Apr-26	Prev_Day	% Change	1 Week
Bajaj Auto	9,994.00	9,543.50	4.72	4.37
Sun Pharma	1,808.30	1,778.70	1.66	11.60
Infosys	1,181.80	1,167.50	1.22	2.36
Tech Mahindra	1,473.50	1,459.80	0.94	8.47
Maruti	13,314.00	13,257.00	0.43	2.04

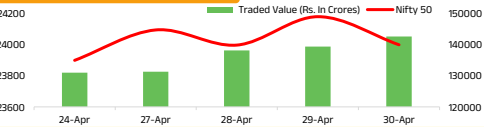
Source: NSE

Nifty 50 Top 5 Losers

Company	30-Apr-26	Prev_Day	% Change	1 Week
Tata Motors	341.55	353	-3.16	-2.55
HUL	2,250.90	2314	-2.74	-3.28
Hindalco	1,038.00	1067	-2.74	-0.99
Axis Bank	1,268.30	1296	-2.17	-7.15
Ultratech Cem	11,586.00	11833	-2.09	-3.43

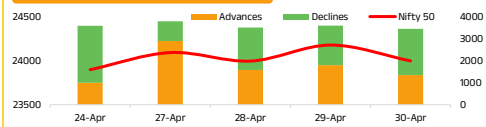
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

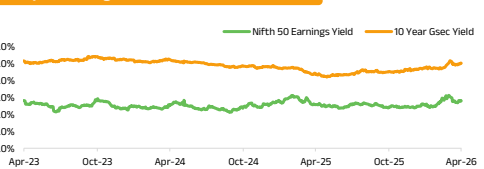
Indian equity markets declined sharply amid elevated crude oil prices, as stalled U.S.-Iran talks and reports of renewed tensions weighed on investor sentiment. Markets were further unsettled by the U.S. Federal Reserve's decision to hold interest rates steady in its Apr 2026 meeting, with the Fed Chair's slightly hawkish commentary amplifying concerns in the context of rising energy prices.

Adani Power reported a sharp increase in fourth-quarter earnings, with consolidated net profit rising about 64% YoY to Rs. 4,271.40 crore for the quarter ended Mar 31, 2026, compared with Rs. 2,599.23 crore in the year-ago period.

Adani Ports and Special Economic Zone (APSEZ) reported a 9.43% rise in consolidated net profit to Rs. 3,308.30 crore for the March quarter of FY26, driven by higher income. The company had posted a net profit of Rs. 3,023.10 crore in the Jan-Mar 2024-25 period.

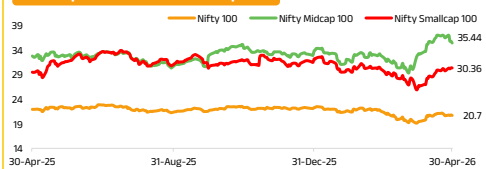
Hero MotoCorp announced a partnership with Quilmotors as its exclusive distributor in Ecuador to accelerate growth. Quilmotors will oversee assembly operations, network development, sales, after-sales service, and spare parts distribution in the South American market, the company said in a statement.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



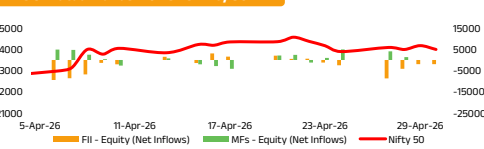
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	-1978.63		-60,847	-191,969
MF**	1348.22		26,157	178,766
DII*	3487.1		48,097	295,422

Source: SEBI, NSDL,*As on 30th Apr 2026,**As on 28th Apr 2026,

F&O Trends

	Latest	Previous	Change %
Near Futures	24098.20	24098.20	0.00%
Near Basis	100.65	100.65	0.00%
Mid Futures	24210.60	24210.60	0.00%
Mid Basis	213.05	213.05	0.00%
Near Open Interest (Cr.)	1.52	1.52	0.00%
Mid Open Interest (Cr.)	0.13	0.13	0.00%
Rollover (%)	8.84	8.84	0.00%
Put Call Ratio (OI)	0.98	1.04	-5.59%
Put Call Ratio(Vol)	0.92	0.89	3.09%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	2629	2694	36757
Index Options	1709382	1713646	367598
Stock Futures	21593	21253	456065
Stock Options	19909	20216	19206
Total	1753514	1757808	879626

Source: NSE

Global Equity Market

Global Indices	1-May-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3933.95	0.26%	0.78%	9.55%
Nasdaq 100 (U.S.)	27710.36	0.94%	1.49%	15.36%
FTSE (U.K.)	10363.93	-0.14%	-0.15%	-0.01%
DAX Index (Germany) ^[1]	24292.38	1.41%	0.68%	4.26%
CAC 40 Index (France) ^[1]	8114.84	0.53%	-0.53%	1.67%
SSE Composite (China) ^[1]	4112.16	0.11%	0.79%	4.14%
Nikkei (Japan)	59513.12	0.38%	-0.34%	10.74%
Kospi (South Korea) ^[1]	6598.87	-1.38%	1.90%	20.45%
HangSeng (Hong Kong) ^[1]	25776.53	-1.28%	-0.78%	1.91%
Strait Times (Singapore) ^[1]	4912.69	1.06%	-0.21%	-1.27%
Ibovespa Sao Paulo (Brazil) ^[1]	187317.64	1.39%	-1.80%	-0.34%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8729.80	0.74%	-0.65%	0.67%
Jakarta Composite (Indonesia) ¹	6956.80	-2.03%	-2.42%	-3.17%
KLSE (Malaysia) ^[1]	1722.02	0.09%	0.10%	0.77%

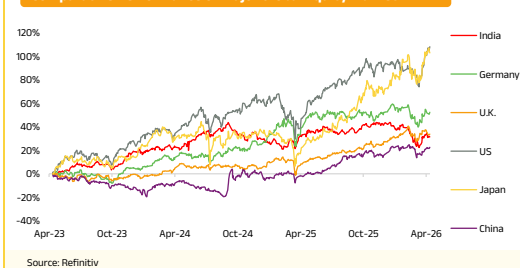
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

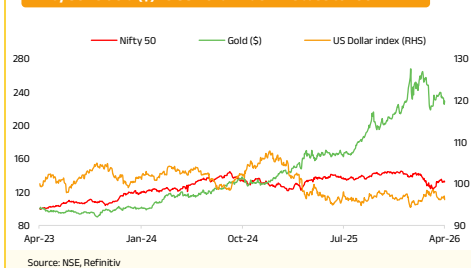
Commodity Prices	1-May-26	1 Day	1 Week	1 Month
Gold (INR/10 gm) ^[1]	149,777	1.57%	-0.29%	-0.22%
Gold (\$/oz)	4,613.62	-0.17%	-2.02%	-3.02%
Silver (INR/1 kg) ^[1]	239,833	1.44%	-0.48%	0.17%
Silver (\$/oz)	75.34	2.17%	-0.45%	0.29%
Brent Crude(\$/bbl)	136.08	-1.10%	3.37%	18.39%
Crude Oil (INR/1 bbl) ^[1]	10,131.00	7.26%	12.34%	5.58%
NYMEX Crude(\$/bbl)	105.28	-3.00%	7.08%	3.57%
Natural Gas (INR/1 mmbt)	250.90	-1.38%	2.03%	-8.10%
Aluminium (INR/1 kg) ^[1]	365.65	-1.31%	-2.49%	3.70%
Copper (INR/1 kg) ^[1]	1,279.10	0.05%	1.42%	7.71%
Nickel (INR/1 kg) ^[1]	1,846.30	0.36%	3.96%	11.78%
Lead (INR/1 kg) ^[1]	204.65	0.81%	1.56%	3.10%
Zinc (INR/1 kg) ^[1]	347.00	-0.23%	-2.40%	6.92%
Mentha Oil (INR/1 kg) ^[1]	1,109.60	-0.47%	-2.18%	-0.48%
Baltic Dry Index	2,730	1.64%	2.44%	34.48%

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



Competitive Intensity

Definition: Competitive intensity refers to the level of competition a company faces within its industry.



Explanation

Competitive intensity influences pricing power, profitability, and long-term growth prospects. Industries with high competition often see pressure on margins due to price wars, innovation cycles, or low switching costs. In contrast, lower competitive intensity allows firms to sustain margins and returns over longer periods. For equity investors, understanding competitive intensity helps assess business sustainability, risk of earnings erosion, and the durability of competitive advantages within a sector.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	6.52	-5.50	0.56	12.86
Flexi Cap Fund	8.03	-4.52	3.47	14.95
Mid Cap Fund	9.99	-1.47	10.16	21.16
Large & Mid Cap Fund	8.45	-3.63	5.50	17.30
Small Cap Fund	12.34	-1.62	11.06	19.39
Multi Cap Fund	9.45	-3.18	6.43	18.04
Focused Fund	8.17	-4.32	3.42	14.59
Value Fund	8.45	-2.20	5.86	17.58
Contra Fund	6.71	-5.40	2.01	17.46
ELSS	8.85	-4.21	4.62	15.57
Equity Savings	2.55	0.09	4.55	9.27
Arbitrage Fund	0.44	2.97	5.68	6.71
Dividend Yield Fund	7.22	-2.75	4.64	17.00
Aggressive Hybrid Fun	6.11	-3.22	3.30	13.07
Balanced Advantage	4.48	-2.55	2.49	10.74

Source: MF316 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 30 Apr, 2026

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