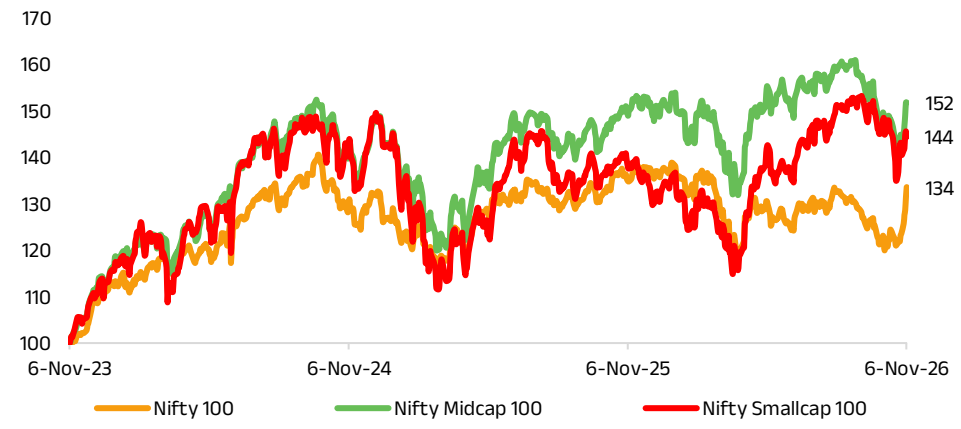
Daily Equity Market Pulse - November 09, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	6-Nov-26	1 Day	1 Week	1 Month
Nifty 50	25,030.35	2.01%	8.58%	9.90%
Nifty 100	25,907.85	1.62%	8.08%	8.48%
Nifty 200	14,189.60	1.30%	7.63%	7.06%
Nifty 500	23,456.95	1.00%	7.13%	5.65%
Nifty Large Midcap 250	16,625.50	0.79%	6.97%	4.91%
Nifty Midcap 150	22,271.15	-0.09%	5.81%	1.33%
Nifty Next 50	71,657.80	-0.15%	5.83%	2.41%
Nifty Smallcap 250	17,386.15	-0.85%	3.71%	-2.88%

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

Smart Beta Index

Index	6-Nov-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	29,926.75	0.19%	4.77%	0.07%
NIFTY 500 Value 50	15,461.65	0.17%	5.53%	2.18%
Nifty 200 Quality 30	19,897.25	0.37%	5.07%	4.41%
Nifty 50 Equal Weight	33,444.05	1.39%	7.21%	7.95%
NIFTY Alpha Low Volatility 30	26,455.80	1.16%	6.00%	5.06%
Nifty High Beta 50	4,309.45	0.08%	9.22%	2.73%
Nifty Low Volatility 50	24,662.50	1.20%	5.94%	6.55%
Nifty Midcap150 Momentum 50	61,967.35	-0.24%	4.20%	0.67%
Nifty PSE	9,531.30	0.50%	5.02%	1.98%
Nifty SME Emerge	14,667.65	-0.95%	2.72%	-3.48%
Nifty 100 ESG	5,112.85	1.44%	7.62%	8.79%

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

Sector Indices

Index	6-Nov-26	1 Day	1 Week	1 Month
Nifty Auto	27,811.80	0.76%	9.40%	8.89%
Nifty Bank	59,086.00	2.27%	8.04%	7.18%
Nifty Consumption	11,957.25	1.29%	7.81%	7.97%
Nifty Financial	27,283.95	2.57%	10.41%	9.37%
Nifty FMCG	46,785.60	0.67%	7.28%	3.50%
Nifty Healthcare	16,931.20	0.67%	2.93%	5.15%
Nifty IT	32,977.90	0.43%	1.14%	17.21%
Nifty Media	1,670.50	-1.52%	2.41%	6.56%
Nifty Metal	12,678.15	0.66%	7.58%	0.62%
Nifty MNC	30,262.35	0.12%	6.50%	-0.74%
Nifty Pharma	27,940.40	1.21%	3.01%	5.24%
Nifty Realty	896.70	0.09%	10.17%	7.08%
Nifty Energy	36,867.30	-0.05%	5.46%	-0.13%

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

Nifty 50 Top 5 Gainers

Company	6-Nov-26	Prev_Day	% Change	1 Week
M&M	3,287.20	3,127.50	5.11	15.73
ICICI Bank	1,571.20	1,500.00	4.75	12.39
HDFC Standard Life Insurance C	565.30	543.80	3.95	7.70
HDFC Bank	788.25	760.00	3.72	13.78
Titan Industries Limited	5,000.00	4,834.60	3.42	12.70

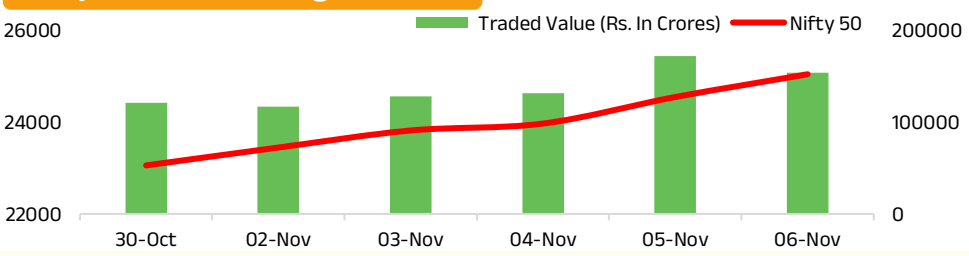
Source: NSE

Nifty 50 Top 5 Losers

Company	6-Nov-26	Prev_Day	% Change	1 Week
Britannia Industries Lim	4,785.00	4980	-3.92	3.13
Tata Motors	292.00	294	-0.58	10.02
Eicher Motors Limited	7,669.50	7713	-0.56	6.23
Power Grid	259.90	261	-0.48	-1.92
Wipro	198.00	198	-0.20	-0.16

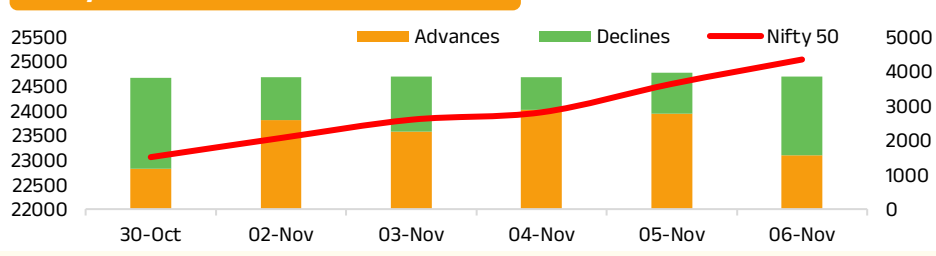
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

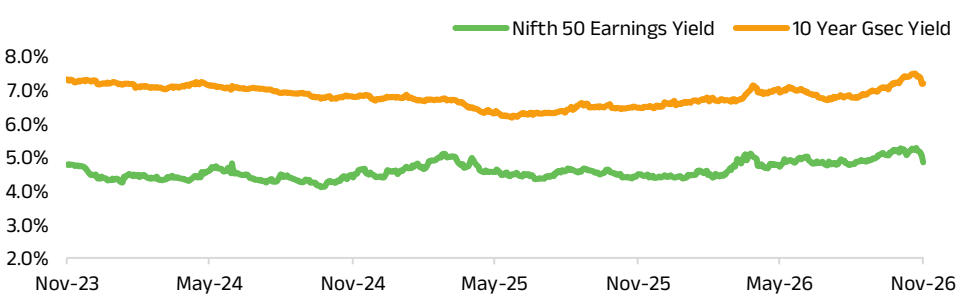
Indian equity markets extended their gains for a seventh consecutive session, as investors viewed domestic equities as a relative safe haven amid heightened global market volatility following a sharp technology-led sell-off in U.S. markets, where investors assessed the prospects of tighter regulations under a Democrat-led administration.

MakeMyTrip has acquired a majority stake in Quick Ride, marking its entry into the ride-pooling segment. The acquisition expands the company's mobility offerings beyond travel bookings and strengthens its presence in daily commuting solutions. The move is aimed at enhancing multimodal transportation services and broadening customer engagement.

Tech Mahindra has acquired additional shares in Pininfarina, increasing its stake to 92.59%. The higher ownership reinforces its commitment to the design and engineering business and provides greater strategic control over the subsidiary. The transaction is part of its long-term investment approach in the global design brand.

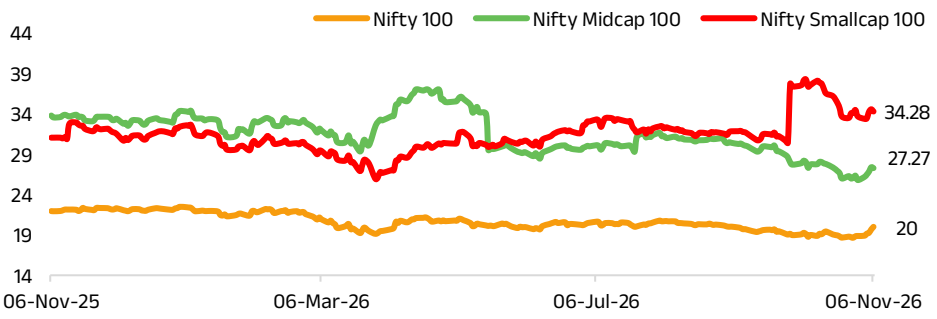
HDFC Bank has completed selling a majority of its stake in HDFC Credila, an education finance subsidiary, for Rs 9,553 crore to private equity firms BPEA EQT and ChrysCapital. The bank would no longer have HDFC Credila as a division.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



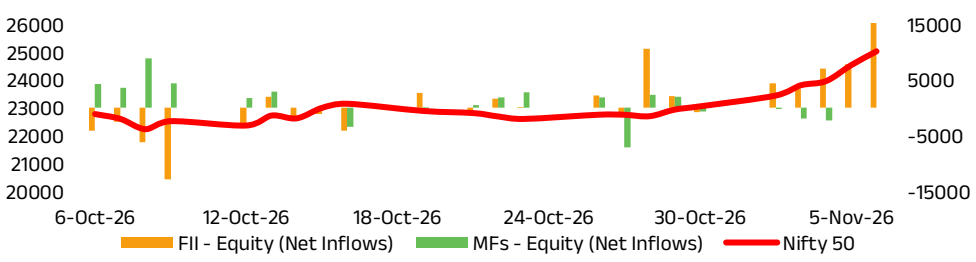
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	16277.99	38,971	4,128	-256,175
MF**	-2221.94	-4,394	34,525	445,513
DII	-5968.7	-24,197	38,024	671,313

Source: SEBI, NSDL;**As on 4th Nov 2026;

Daily Equity Market Pulse - November 09, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	25032.40	24588.00	1.81%
Near Basis	2.05	51.40	-96.01%
Mid Futures	25159.60	24719.10	1.78%
Mid Basis	129.25	182.50	-29.18%
Near Open Interest (Cr.)	1.21	1.26	-4.38%
Mid Open Interest (Cr.)	0.15	0.14	5.26%
Rollover (%)	13.26	11.96	10.82%
Put Call Ratio (OI)	1.47	1.29	13.82%
Put Call Ratio(Vol)	0.85	0.83	2.03%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	11166	3282	39666
Index Options	4929361	4935741	638921
Stock Futures	33162	30226	403794
Stock Options	36873	35702	81926
Total	5010562	5004950	1164307

Source: NSE

Global Equity Market

Global Indices	6-Nov-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4018.78	0.36%	-2.56%	-5.47%
Nasdaq 100 (U.S.)	26989.99	1.35%	-4.91%	-13.56%
FTSE (U.K.)	10673.94	-1.01%	-0.52%	1.25%
DAX Index (Germany)	25820.36	-1.92%	0.01%	1.46%
CAC 40 Index (France)	8139.00	-0.81%	2.13%	3.48%
SSE Composite (China)	3649.18	-1.10%	1.39%	NA
Nikkei (Japan)	57434.77	-5.96%	-9.25%	-18.74%
Kospi (South Korea)	5059.69	-6.02%	-11.71%	-27.11%
HangSeng (Hong Kong)	24481.86	-1.27%	5.10%	0.83%
Strait Times (Singapore)	5179.17	-2.21%	-3.67%	-9.16%
Ibovespa Sao Paulo (Brazil)	168498.45	1.39%	0.34%	-18.14%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	9020.80	-0.49%	1.27%	3.26%
Jakarta Composite (Indonesia)	5050.43	0.40%	-0.13%	-18.45%
KLSE (Malaysia)	1616.58	-1.18%	0.06%	-1.03%

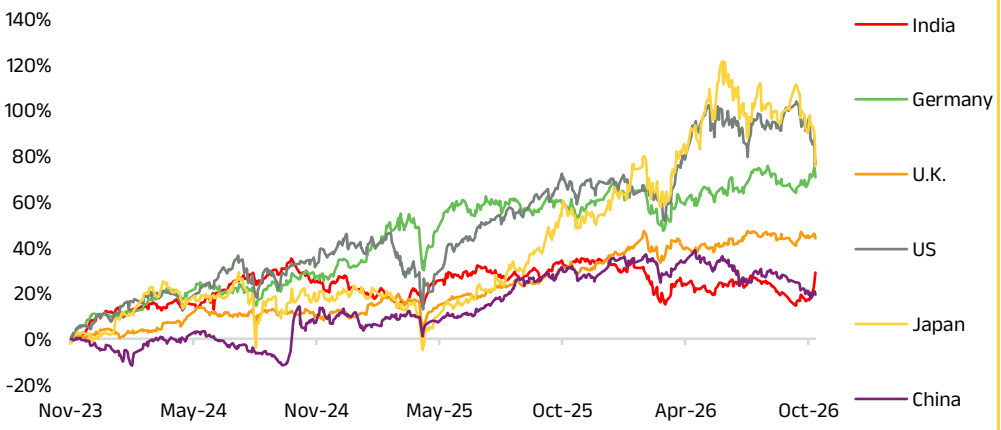
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	6-Nov-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	141,032	-1.50%	0.86%	-4.55%
Gold ($/oz)	4,065.63	-0.53%	4.92%	-2.35%
Silver (INR/1 kg)	184,049	-1.84%	0.88%	-17.28%
Silver ($/oz)	51.87	0.23%	5.64%	-15.91%
Brent Crude($/bbl)	96.35	0.91%	-20.21%	-32.02%
Crude Oil (INR/1 bbl)	8,545.00	2.25%	-12.16%	-0.77%
NYMEX Crude($/bbl)	94.27	0.34%	-12.27%	4.23%
Natural Gas (INR/1 mmbtu)	278.20	-0.86%	-1.17%	-5.76%
Aluminium (INR/1 kg)	330.15	-0.86%	-0.60%	-3.75%
Copper (INR/1 kg)	1,368.65	-1.04%	-1.92%	-3.86%
Nickel (INR/1 kg)	1,550.00	0.70%	2.26%	-0.45%
Lead (INR/1 kg)	200.35	1.52%	0.43%	1.88%
Zinc (INR/1 kg)	426.50	-1.10%	-0.12%	-0.73%
Mentha Oil (INR/1 kg)	1,455.50	0.99%	2.06%	1.14%
Baltic Dry Index	2,805	2.37%	3.35%	-6.56%

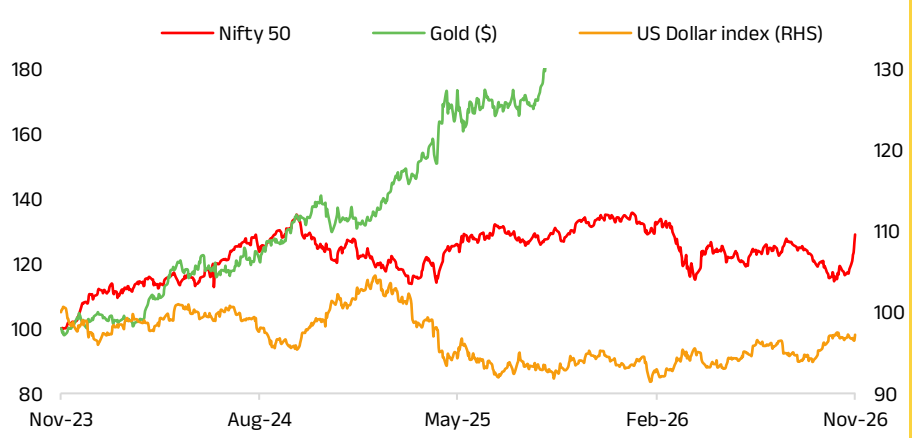
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	7.34	4.05	0.79	11.16
Flexi Cap Fund	3.62	4.36	2.52	12.16
Mid Cap Fund	0.74	1.72	3.45	14.87
Large & Mid Cap Fund	3.59	2.88	2.06	13.44
Small Cap Fund	-2.78	5.34	7.14	12.95
Multi Cap Fund	2.08	4.54	4.34	13.73
Focused Fund	4.60	5.16	3.54	12.56
Value Fund	3.31	0.76	1.20	12.40
Contra Fund	4.54	1.66	-1.31	12.99
ELSS	2.84	1.61	0.04	11.12
Equity Savings	2.01	2.97	3.72	8.05
Arbitrage Fund	0.50	3.10	5.95	6.49
Dividend Yield Fund	3.54	0.05	0.07	12.11
Aggressive Hybrid Fund	3.71	2.82	1.59	10.76
Balanced Advantage	3.59	2.86	1.97	9.05

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.

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