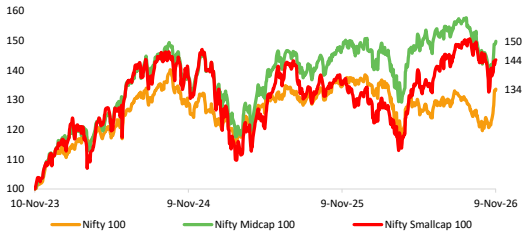
Daily Equity Market Pulse - November 11, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	9-Nov-26	1 Day	1 Week	1 Month
Nifty 50	25,044.65	0.06%	5.18%	11.21%
Nifty 100	25,992.95	0.33%	5.07%	10.38%
Nifty 200	14,245.90	0.40%	4.89%	9.06%
Nifty 500	23,567.00	0.47%	4.65%	7.78%
Nifty Large Midcap 250	16,703.20	0.47%	4.60%	7.07%
Nifty Midcap 150	22,408.55	0.62%	4.11%	3.73%
Nifty Next 50	72,789.45	1.58%	4.55%	6.78%
Nifty Smallcap 250	17,577.00	1.10%	3.02%	0.01%

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

Smart Beta Index

Index	9-Nov-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Inde	30,255.55	1.10%	3.08%	3.62%
NIFTY 500 Value 50	15,614.15	0.99%	4.35%	5.02%
Nifty 200 Quality 30	19,862.70	-0.17%	1.65%	5.30%
Nifty 50 Equal Weight	33,376.55	-0.20%	4.11%	9.37%
NIFTY Alpha Low Volatility 3(	26,551.45	0.36%	3.08%	7.53%
Nifty High Beta 50	4,343.05	0.78%	6.61%	6.11%
Nifty Low Volatility 50	24,778.05	0.47%	3.54%	8.45%
Nifty Midcap150 Momentum !	62,580.50	0.99%	3.32%	3.28%
Nifty PSE	9,577.25	0.48%	2.98%	5.50%
Nifty SME Emerge	14,831.25	1.12%	3.10%	-1.31%
Nifty 100 ESG	5,117.65	0.09%	4.93%	10.34%

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

Sector Indices

Index	9-Nov-26	1 Day	1 Week	1 Month
Nifty Auto	27,925.90	0.41%	6.58%	12.33%
Nifty Bank	59,741.25	1.11%	7.56%	8.12%
Nifty Consumption	11,935.55	-0.18%	4.16%	9.47%
Nifty Financial	27,384.90	0.37%	7.99%	9.68%
Nifty FMCG	46,660.65	-0.27%	2.37%	4.00%
Nifty Healthcare	17,411.00	2.83%	5.01%	9.81%
Nifty IT	32,468.90	-1.54%	-0.25%	13.63%
Nifty Media	1,707.20	2.20%	4.94%	9.91%
Nifty Metal	12,664.65	-0.11%	4.27%	5.53%
Nifty MNC	30,521.55	0.86%	3.49%	2.64%
Nifty Pharma	28,896.10	3.42%	6.16%	11.30%
Nifty Realty	897.70	0.11%	6.69%	11.66%
Nifty Energy	37,164.95	0.81%	2.41%	3.85%

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

Nifty 50 Top 5 Gainers

Company	9-Nov-26	Prev_Day	% Change	1 Week
Divi's Lab	11,565.50	10,320.50	12.06	14.92
Sun Pharma	1,904.50	1,860.00	2.39	7.60
SBI	1,042.00	1,018.50	2.31	7.40
NTPC	328.75	323.45	1.64	2.24
L&T Ltd.	4,185.00	4,117.70	1.63	6.00

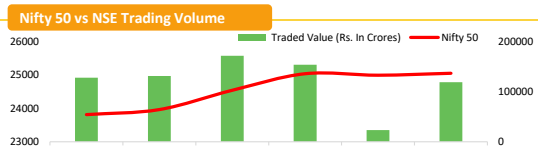
Source: NSE

Nifty 50 Top 5 Losers

Company	9-Nov-26	Prev_Day	% Change	1 Week
Infosys	1,154.10	1181	-2.31	0.52
HCL Tech	1,407.00	1440	-2.29	-2.23
SBI Life Insurance Cc	1,748.00	1784	-2.02	3.86
Hero Moto	5,410.50	5513	-1.86	2.08
Grasim Indus	3,169.70	3227	-1.78	2.58

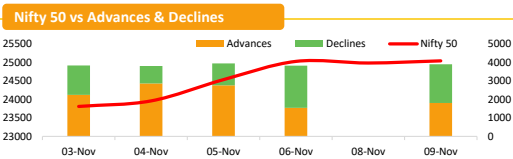
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

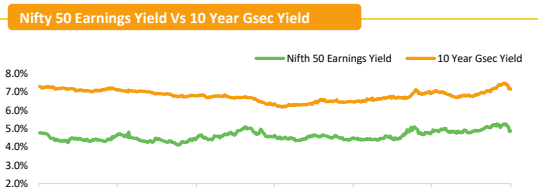
Indian equity markets closed higher after strong late-session buying helped erase earlier losses. Gains in select heavyweight stocks and continued investor optimism supported sentiment despite mixed global cues. Broader indices also ended in positive territory, reflecting resilience in domestic markets.

IIFL Finance announced plans to raise Rs. 6,414 crore through investments from Blackstone, promoter entities and other investors. The capital infusion is aimed at strengthening the company's balance sheet, supporting business growth and enhancing financial flexibility. The fund raise is subject to regulatory and shareholder approvals.

Cognizant has established the Claude Frontier Group with more than 25,000 professionals to accelerate enterprise adoption of advanced AI solutions. The initiative focuses on scaling AI-led transformation capabilities and developing industry-specific use cases using Anthropic's Claude technology. The move reinforces the company's commitment to expanding its AI services portfolio.

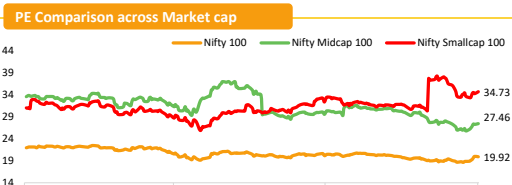
HDFC Bank has completed selling a majority of its stake in HDFC Credila, an education finance subsidiary, for Rs 9,553 crore to private equity firms BPEA EQT and ChrysCapital. The bank would no longer have HDFC Credila as a division.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



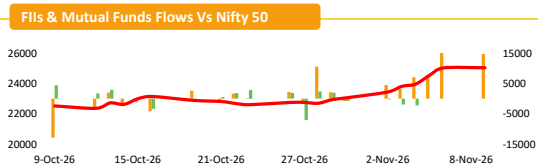
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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*	14767.73	53,739	18,896	-241,407
MF**	-2221.94	-4,394	34,525	445,513
DII*	-7172.53	-31,369	30,851	664,140

Source: SEBI, NSDL;*As on 9th Nov 2026;**As on 4th Nov 2026;

Daily Equity Market Pulse - November 11, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	25033.20	25033.20	0.00%
Near Basis	-11.45	-11.45	0.00%
Mid Futures	25180.50	25180.50	0.00%
Mid Basis	135.85	135.85	0.00%
Near Open Interest (Cr.)	1.21	1.21	0.00%
Mid Open Interest (Cr.)	0.16	0.16	0.00%
Rollover (%)	14.46	14.46	0.00%
Put Call Ratio (OI)	1.15	1.47	-21.96%
Put Call Ratio(Vol)	0.90	0.85	5.53%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	110	281	33272
Index Options	373351	376803	745837
Stock Futures	1251	1466	407614
Stock Options	2993	3388	93537
Total	377705	381938	1280259

Source: NSE

Global Equity Market

Global Indices	10-Nov-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4100.45	-0.38%	-0.51%	-3.45%
Nasdaq 100 (U.S.)	27740.79	-0.60%	-1.56%	-10.17%
FTSE (U.K.)	10751.59	-0.29%	1.06%	1.89%
DAX Index (Germany)	26347.45	0.31%	1.87%	5.02%
CAC 40 Index (France)	8278.59	0.55%	3.22%	6.09%
SSE Composite (China)	3663.72	0.08%	1.54%	-3.93%
Nikkei (Japan)	60459.58	2.87%	-4.16%	-12.42%
Kospi (South Korea)	5239.13	4.39%	-7.25%	-20.93%
HangSeng (Hong Kong)	24557.04	0.44%	4.38%	1.43%
Strait Times (Singapore)	5258.59	1.53%	-0.20%	-2.65%
Ibovespa Sao Paulo (Brazil)	171336.99	-0.52%	3.51%	-18.05%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	9129.00	1.10%	2.73%	4.73%
Jakarta Composite (Indonesia)	5125.73	1.02%	4.52%	-15.89%
KLSE (Malaysia)	1604.07	-0.77%	-1.10%	-0.27%

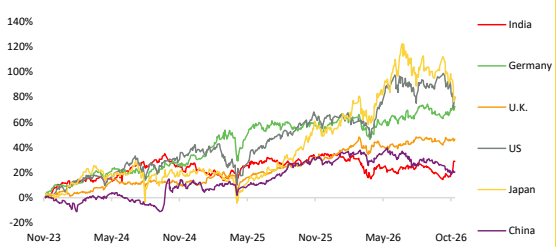
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	10-Nov-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)[1]	141,838	0.57%	3.51%	-4.75%
Gold ($/oz)	4,030.93	-2.61%	2.61%	-3.88%
Silver (INR/1 kg)[1]	186,023	1.07%	5.61%	-15.90%
Silver ($/oz)	51.51	-3.57%	3.48%	-15.29%
Brent Crude($/bbl)	89.84	-2.48%	-18.33%	-39.93%
Crude Oil (INR/1 bbl)[1]	8,551.00	0.07%	-6.57%	-3.42%
NYMEX Crude($/bbl)	89.52	1.44%	-8.18%	-3.74%
Natural Gas (INR/1 mmb	282.20	1.44%	4.13%	-7.96%
Aluminium (INR/1 kg)[1]	332.70	0.77%	0.30%	-2.06%
Copper (INR/1 kg)[1]	1,368.00	-0.05%	-1.76%	-5.30%
Nickel (INR/1 kg)[1]	1,550.00	0.00%	3.58%	0.10%
Lead (INR/1 kg)[1]	199.50	-0.42%	0.88%	0.45%
Zinc (INR/1 kg)[1]	428.50	0.47%	0.19%	-1.65%
Mentha Oil (INR/1 kg)[1]	1,455.50	0.00%	2.13%	4.14%
Baltic Dry Index	2,862	0.28%	10.50%	-1.89%

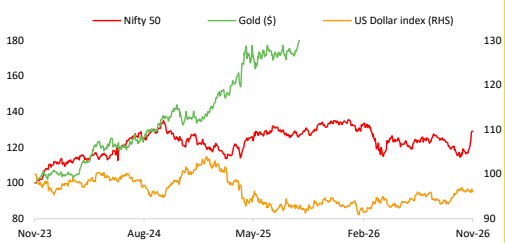
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose

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	9.33	4.98	1.00	11.19
Flexi Cap Fund	5.84	4.83	2.89	12.11
Mid Cap Fund	3.01	1.35	3.47	14.58
Large & Mid Cap Fun	6.00	3.23	2.36	13.30
Small Cap Fund	-0.10	5.04	8.18	12.92
Multi Cap Fund	4.42	4.68	4.87	13.68
Focused Fund	6.78	5.55	3.80	12.50
Value Fund	5.53	1.28	1.31	12.27
Contra Fund	6.93	2.49	-0.70	12.99
ELSS	5.03	2.16	0.48	11.11
Equity Savings	2.72	3.05	3.80	8.00
Arbitrage Fund	0.57	2.90	5.97	6.46
Dividend Yield Fund	5.43	0.58	0.13	12.06
Aggressive Hybrid Fu	5.35	3.36	1.82	10.72
Balanced Advantage	4.93	3.26	2.14	9.04

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 09 Nov,

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