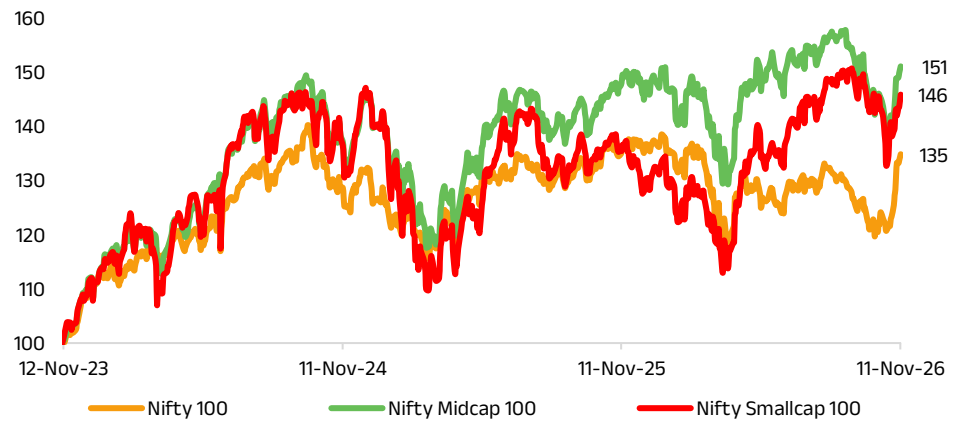
Daily Equity Market Pulse - November 12, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	11-Nov-26	1 Day	1 Week	1 Month
Nifty 50	25,255.05	0.84%	5.40%	12.14%
Nifty 100	26,216.80	0.86%	5.11%	11.33%
Nifty 200	14,367.30	0.85%	4.77%	9.99%
Nifty 500	23,779.30	0.90%	4.44%	8.75%
Nifty Large Midcap 250	16,845.75	0.85%	4.25%	7.98%
Nifty Midcap 150	22,597.95	0.85%	3.34%	4.60%
Nifty Next 50	73,486.20	0.96%	3.80%	7.80%
Nifty Smallcap 250	17,798.15	1.26%	2.30%	1.27%

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

Smart Beta Index

Index	11-Nov-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	30,606.75	1.16%	2.59%	4.83%
NIFTY 500 Value 50	15,844.25	1.47%	3.92%	6.57%
Nifty 200 Quality 30	19,991.45	0.65%	1.63%	5.98%
Nifty 50 Equal Weight	33,670.20	0.88%	4.13%	10.33%
NIFTY Alpha Low Volatility 30	26,733.55	0.69%	3.00%	8.26%
Nifty High Beta 50	4,410.65	1.56%	5.93%	7.76%
Nifty Low Volatility 50	24,898.35	0.49%	3.43%	8.98%
Nifty Midcap150 Momentum 50	63,297.65	1.15%	3.07%	4.46%
Nifty PSE	9,657.30	0.84%	1.81%	6.38%
Nifty SME Emerge	14,940.60	0.74%	2.31%	-0.58%
Nifty 100 ESG	5,156.20	0.75%	4.81%	11.17%

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

Sector Indices

Index	11-Nov-26	1 Day	1 Week	1 Month
Nifty Auto	28,523.30	2.14%	7.62%	14.74%
Nifty Bank	60,792.40	1.76%	8.73%	10.02%
Nifty Consumption	12,082.50	1.23%	4.33%	10.81%
Nifty Financial	27,663.40	1.02%	8.14%	10.79%
Nifty FMCG	47,188.55	1.13%	2.00%	5.18%
Nifty Healthcare	17,355.35	-0.32%	3.91%	9.46%
Nifty IT	32,295.60	-0.53%	0.73%	13.02%
Nifty Media	1,719.00	0.69%	0.49%	10.67%
Nifty Metal	12,786.15	0.96%	2.40%	6.54%
Nifty MNC	30,788.85	0.88%	2.41%	3.54%
Nifty Pharma	28,776.45	-0.41%	5.28%	10.84%
Nifty Realty	893.95	-0.42%	3.30%	11.19%
Nifty Energy	37,548.05	1.03%	1.27%	4.92%

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

Nifty 50 Top 5 Gainers

Company	11-Nov-26	Prev_Day	% Change	1 Week
M&M	3,465.00	3,290.60	5.30	16.99
United Phos	554.70	541.50	2.44	4.86
Power Grid	263.75	257.95	2.25	0.65
ITC	285.00	278.80	2.22	1.79
Maruti	13,185.00	12,928.00	1.99	9.92

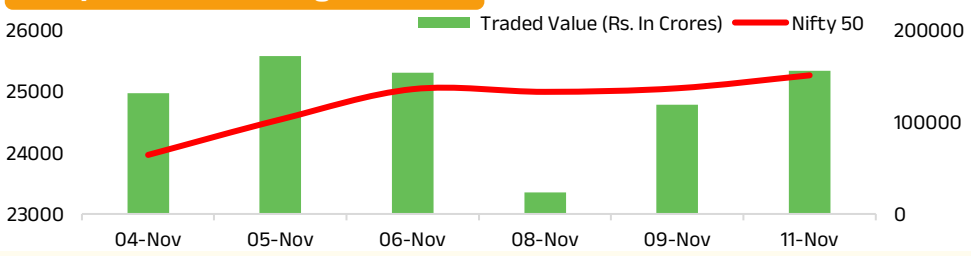
Source: NSE

Nifty 50 Top 5 Losers

Company	11-Nov-26	Prev_Day	% Change	1 Week
Adani Ports & SEZ	1,907.00	1943	-1.84	-0.16
Divi's Lab	11,367.00	11566	-1.72	13.25
Hero Moto	5,345.00	5411	-1.21	-1.01
ICICI Bank	1,571.60	1589	-1.10	10.36
Tech Mahindra	1,788.50	1805	-0.91	0.31

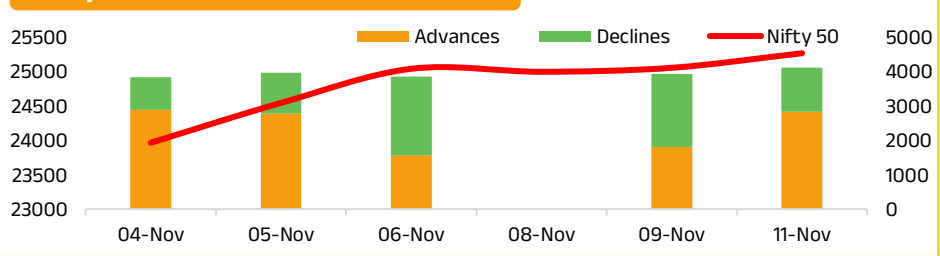
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

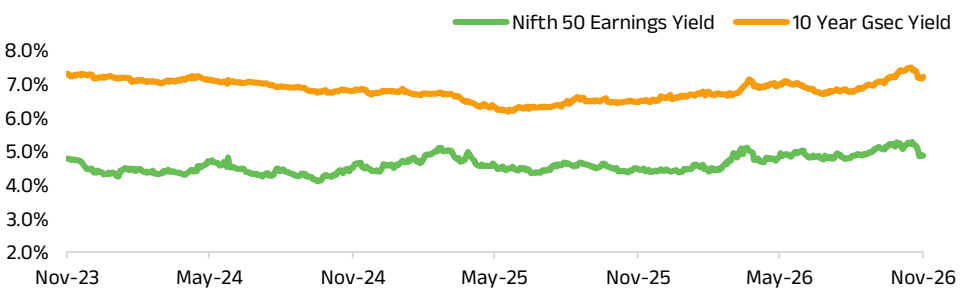
Indian equity markets advanced as investor sentiment was boosted by sustained foreign fund inflows and the retreat in crude oil prices amid hopes of a de-escalation in the U.S.-Israel-Iran conflict. The appreciation of the Indian rupee against the U.S. dollar, supported by the steady return of foreign capital, further contributed to the gains.

ValueQuest, the Mumbai-based investment firm with approximately $3.31 billion in assets under management across public and private markets, has committed to investing in Sagar Defence Engineering and Rational Engineers. Including its recently announced investment in TASE Global, the firm's total commitments to these three companies amount to Rs. 775 crore.

Adani Power Limited has accelerated preparatory work for its proposed 2,400 MW ultra-supercritical thermal power project in Odisha, with the Rs. 30,181 crore investment entering the environmental clearance stage.

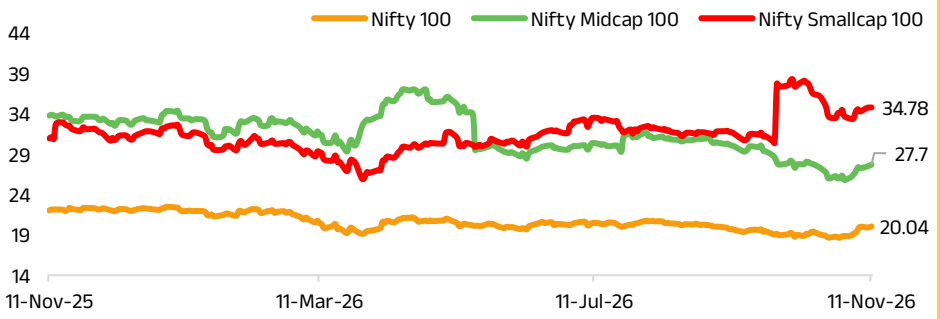
Bharat Heavy Electricals Limited (BHEL) has received an order from Power Grid Corporation of India for the installation of two synchronous condensers at Kalyanpur, Gujarat. The order has been placed on behalf of Power Grid's project special purpose vehicle.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



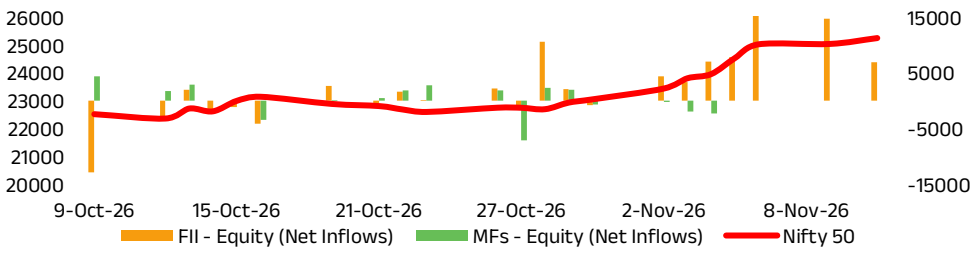
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	6959.35	60,698	25,855	-234,448
MF**	-2221.94	-4,394	34,525	445,513
DII	-8434.53	-39,804	22,417	655,706

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

Daily Equity Market Pulse - November 12, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

F&O Trends

	Latest	Previous	Change %
Near Futures	25214.20	25033.20	0.72%
Near Basis	-40.85	-11.45	256.77%
Mid Futures	25360.10	25180.50	0.71%
Mid Basis	105.05	135.85	-22.67%
Near Open Interest (Cr.)	1.15	1.21	-5.04%
Mid Open Interest (Cr.)	0.15	0.16	-4.43%
Rollover (%)	15.07	14.46	4.21%
Put Call Ratio (OI)	0.98	1.15	-14.52%
Put Call Ratio(Vol)	1.06	0.90	17.84%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	4522	2709	32662
Index Options	5100023	5090359	543405
Stock Futures	16642	19498	408279
Stock Options	23893	25051	97113
Total	5145080	5137617	1081459

Source: NSE

Global Equity Market

Global Indices	11-Nov-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4152.54	1.27%	-0.78%	-2.23%
Nasdaq 100 (U.S.)	28374.25	2.28%	-0.22%	-8.12%
FTSE (U.K.)	10835.47	0.78%	0.06%	2.69%
DAX Index (Germany)	26662.77	1.20%	0.85%	6.28%
CAC 40 Index (France)	8332.87	0.66%	1.90%	6.79%
SSE Composite (China)	3680.64	0.46%	-0.15%	-3.49%
Nikkei (Japan)	61248.59	1.31%	-1.51%	-11.27%
Kospi (South Korea)	5375.36	2.60%	-5.43%	-18.87%
HangSeng (Hong Kong)	24315.92	-0.98%	1.66%	0.43%
Strait Times (Singapore)	5289.66	0.59%	0.40%	-2.08%
Ibovespa Sao Paulo (Brazil)	172060.43	0.42%	2.68%	-17.70%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	9153.20	0.27%	3.61%	5.01%
Jakarta Composite (Indonesia)	5115.03	-0.21%	3.97%	-16.06%
KLSE (Malaysia)	1595.19	-0.55%	-1.32%	-0.82%

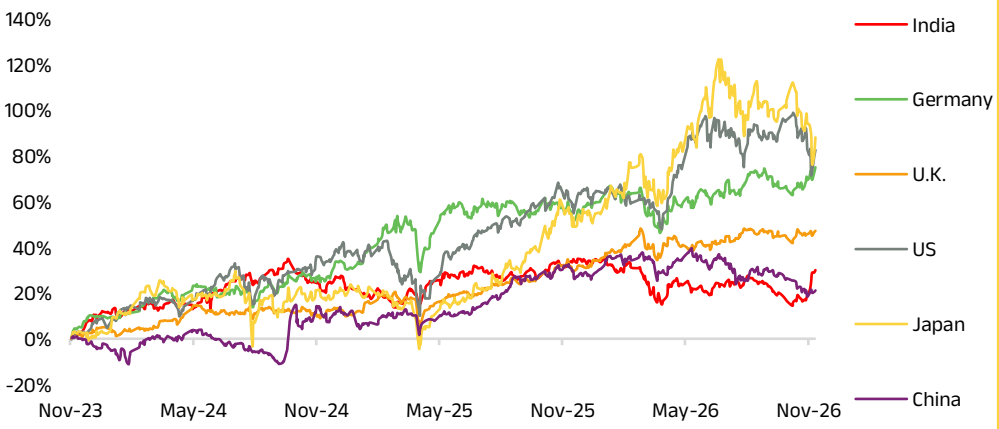
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	11-Nov-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	139,963	-1.32%	-0.91%	-6.01%
Gold ($/oz)	3,987.29	-1.08%	-1.78%	-4.92%
Silver (INR/1 kg)	185,949	-0.04%	0.16%	-15.93%
Silver ($/oz)	51.69	0.35%	-1.01%	-14.99%
Brent Crude($/bbl)	91.79	2.17%	-11.09%	-38.62%
Crude Oil (INR/1 bbl)	8,076.00	-5.55%	-11.40%	-8.79%
NYMEX Crude($/bbl)	89.52	0.00%	0.00%	-3.74%
Natural Gas (INR/1 mmbtu)	309.40	9.64%	12.67%	0.91%
Aluminium (INR/1 kg)	331.00	-0.51%	-0.30%	-2.56%
Copper (INR/1 kg)	1,374.00	0.44%	-0.18%	-4.88%
Nickel (INR/1 kg)	1,536.00	-0.90%	1.69%	-0.81%
Lead (INR/1 kg)	197.70	-0.90%	0.05%	-0.45%
Zinc (INR/1 kg)	426.85	-0.39%	-1.42%	-2.03%
Mentha Oil (INR/1 kg)	1,451.50	-0.27%	0.23%	3.85%
Baltic Dry Index	2,959	3.39%	9.84%	1.44%

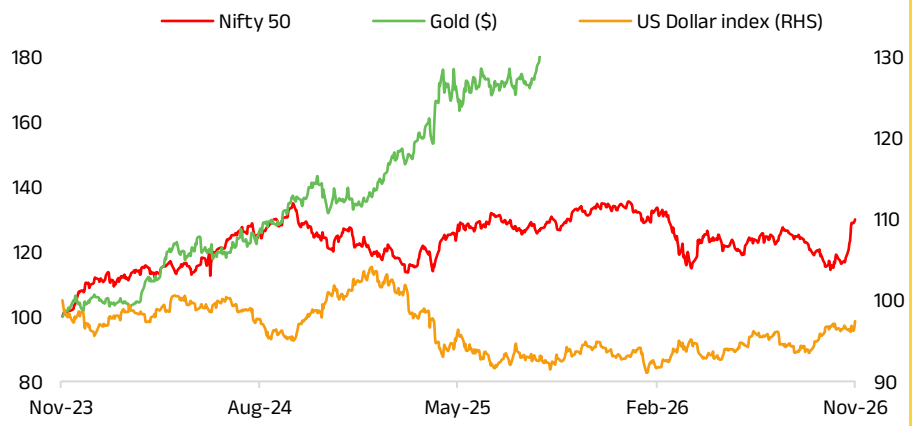
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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	10.18	7.38	1.36	11.46
Flexi Cap Fund	6.79	7.09	3.49	12.41
Mid Cap Fund	4.02	3.48	4.26	14.94
Large & Mid Cap Fund	6.83	5.40	2.87	13.59
Small Cap Fund	1.04	7.24	9.45	13.30
Multi Cap Fund	5.44	6.95	5.63	14.01
Focused Fund	7.65	7.75	4.31	12.78
Value Fund	6.43	3.36	1.80	12.55
Contra Fund	7.64	4.53	-0.45	13.20
ELSS	5.98	4.41	1.17	11.43
Equity Savings	3.04	3.75	3.97	8.09
Arbitrage Fund	0.72	3.03	6.09	6.50
Dividend Yield Fund	6.06	2.33	0.43	12.29
Aggressive Hybrid Fund	6.00	5.06	2.20	10.93
Balanced Advantage	5.52	4.74	2.50	9.23

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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