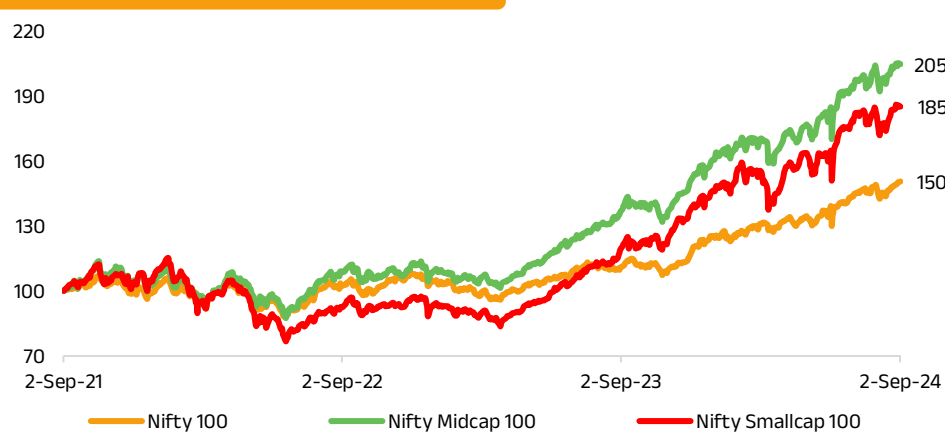


Broad Indices Historical Movement



Source: NSE

Broad Indices

	2-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,278.70	0.17%	1.07%	2.27%
Nifty 100	26,335.00	0.23%	0.99%	2.18%
Nifty 200	14,318.05	0.16%	0.89%	2.18%
Nifty 500	23,760.70	0.11%	0.84%	2.16%
Nifty Large Midcap 250	16,564.55	-0.03%	0.74%	1.95%
Nifty Midcap 150	21,862.85	-0.29%	0.48%	1.72%
Nifty Next 50	75,335.80	0.07%	0.76%	2.74%
Nifty Smallcap 250	18,157.70	-0.07%	0.42%	2.72%

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

Smart Beta Index

Index	2-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,855.05	-0.67%	0.37%	2.52%
NIFTY 500 Value 50	15,379.54	-0.33%	0.27%	0.54%
Nifty 200 Quality 30	22,910.75	0.45%	1.01%	4.47%
Nifty 50 Equal Weight	32,545.50	0.23%	1.34%	3.03%
NIFTY Alpha Low Volatility 30	30,302.90	-0.06%	0.86%	2.56%
Nifty High Beta 50	4,163.93	0.00%	0.06%	-1.99%
Nifty Low Volatility 50	25,705.85	0.31%	1.05%	3.05%
Nifty Midcap150 Momentum 50	65,879.35	-0.81%	0.26%	2.61%
Nifty PSE	11,422.20	-0.62%	-0.20%	-0.94%
Nifty SME Emerge	16,075.34	0.72%	0.98%	8.78%
Nifty 100 ESG	5,095.40	0.32%	1.67%	3.21%

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

Sector Indices

Index	2-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	26,071.40	-0.39%	0.50%	1.39%
Nifty Bank	51,439.55	0.17%	0.57%	0.17%
Nifty Consumption	12,101.95	0.20%	0.54%	3.01%
Nifty Financial	23,727.55	0.38%	1.46%	1.55%
Nifty FMCG	63,578.60	0.82%	-0.12%	2.97%
Nifty Healthcare	14,403.50	-0.71%	2.01%	4.09%
Nifty IT	42,975.60	0.44%	3.15%	8.17%
Nifty Media	2,094.55	-0.47%	1.47%	-0.27%
Nifty Metal	9,307.15	-1.04%	-1.93%	-0.08%
Nifty MNC	30,911.60	-0.21%	-0.31%	0.98%
Nifty Pharma	22,987.45	-0.99%	1.92%	4.95%
Nifty Realty	1,050.90	-0.24%	1.44%	1.33%
Nifty Energy	43,782.95	0.06%	-0.02%	-1.24%

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

Nifty 50 Top 5 Gainers

Company	2-Sep-24	Prev_Day	% Change	1 Week
Bajaj Finance	7,440.05	7,200.15	3.33	9.76
HCL Tech	1,806.65	1,753.25	3.05	5.07
Hero Moto	5,578.20	5,455.40	2.25	4.39
Bajaj Auto	11,126.10	10,891.55	2.15	6.65
SBI Life Insurance Company Limited	1,888.75	1,850.30	2.08	5.15

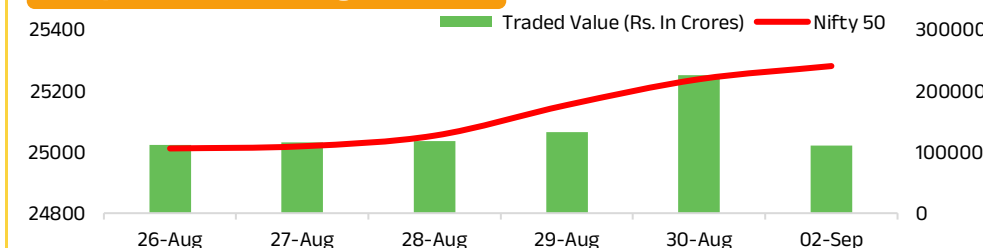
Source: NSE

Nifty 50 Top 5 Losers

Company	2-Sep-24	Prev_Day	% Change	1 Week
Hindalco	683.90	701	-2.49	-3.93
Dr.Reddy	6,872.15	7031	-2.26	-1.02
Tata Motors	1,092.65	1111	-1.68	0.02
NTPC	410.00	416	-1.49	-1.17
ONGC	326.20	331	-1.38	-0.50

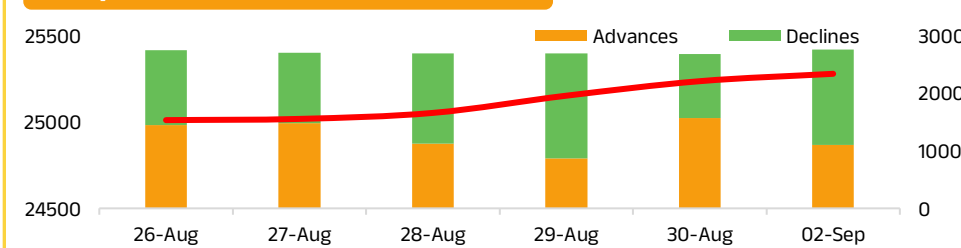
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

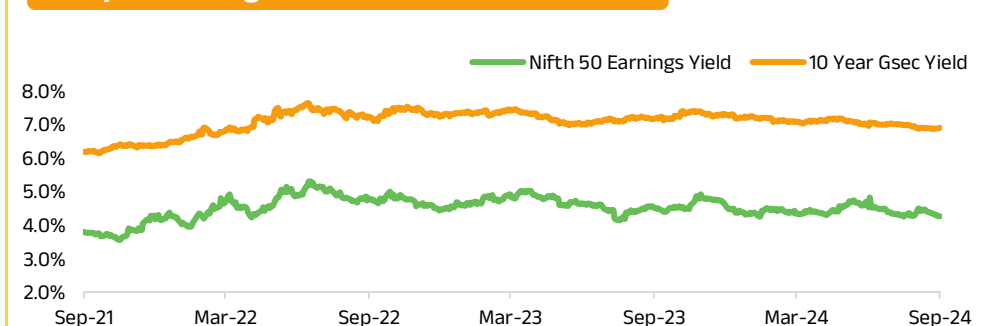
Indian equity markets rose slightly, led by IT, FMCG and banking stocks. The overall gains were limited by mixed global clues, as investors looked ahead to the upcoming U.S. jobs report later in the week for further insights into the U.S. Federal Reserve's potential rate cut path. The market anticipates that the U.S. Federal Reserve is inclined to implement a rate reduction during its Sep 2024.

Gujarat State Petroleum Corporation (GSPC) Group's board has sanctioned the merger of GSPC, GSPL, GSPC Energy (GEL), and Gujarat Gas (GGL) with Gujarat Gas (GGL). Additionally, it has approved the demerger of the gas transmission segment into a newly established publicly traded entity, GSPL Transmission Ltd (GTL).

Adani Wilmar is poised to acquire three food companies, backed by a significant acquisition fund of \$1 billion, in order to enhance its presence in the burgeoning packaged consumer goods market in India. The company's strategy involves purchasing at least three brands specialising in spices, ready-to-cook foods, and packaged edibles.

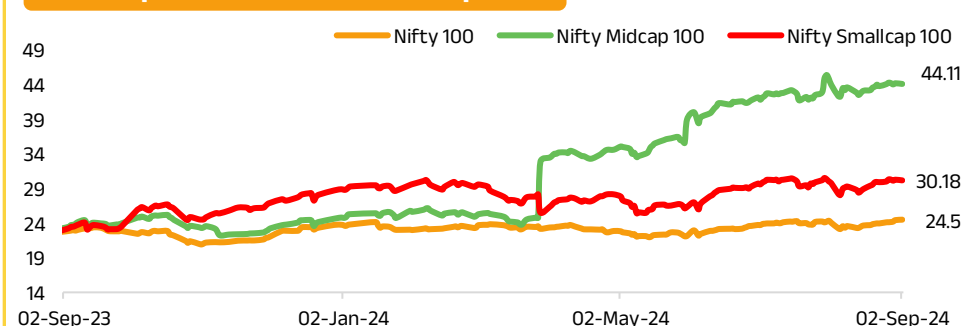
Adani Energy Solutions announced the acquisition of a 298-kilometer special purpose vehicle (SPV) associated with the Khavda Phase IV Part-A transmission project, involving an investment of Rs. 4,091 crore. The SPV, named Khavda IVA Power Transmission Ltd, was established by REC Power Development and Consultancy Ltd (RECPDCL).

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



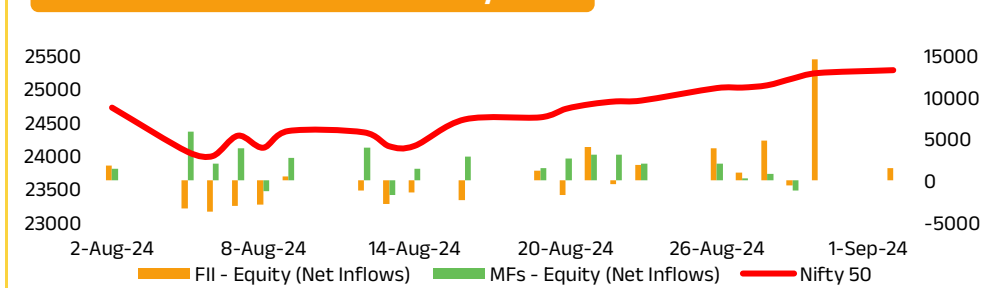
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	1503.96	1,504	41,189	44,390
MF**	-1189.74		55,034	246,460
DII	356.37	356	72,121	308,248

Source: SEBI, NSDL; **As on 29th Aug 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25340.50	25376.90	-0.14%
Near Basis	61.75	141.00	-56.21%
Mid Futures	25467.80	25498.50	-0.12%
Mid Basis	189.10	262.55	-27.98%
Near Open Interest (Cr.)	1.49	1.39	7.23%
Mid Open Interest (Cr.)	0.11	0.10	6.07%
Rollover (%)	7.30	7.27	0.47%
Put Call Ratio (OI)	1.18	1.41	-16.58%
Put Call Ratio(Vol)	1.02	0.94	7.78%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	5743	3467	36707
Index Options	1490330	1502348	381204
Stock Futures	44364	39993	333893
Stock Options	40291	40369	20249
Total	1580727	1586177	772054

Source: NSE

Global Equity Market

Global Indices	2-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.) ^[1]	3082.73	0.99%	0.56%	5.76%
Nasdaq 100 (U.S.) ^[1]	19574.64	1.29%	0.30%	6.15%
FTSE (U.K.)	8363.84	-0.15%	0.43%	2.31%
DAX Index (Germany)	18930.85	0.13%	1.69%	7.19%
CAC 40 Index (France)	7646.42	0.20%	0.74%	5.44%
SSE Composite (China)	2811.03	-1.10%	-1.56%	-3.25%
Nikkei (Japan)	38700.87	0.14%	1.55%	7.77%
Kospi (South Korea)	2681.00	0.25%	-0.63%	0.18%
HangSeng (Hong Kong)	17691.97	-1.65%	-0.60%	4.41%
Strait Times (Singapore)	3463.08	0.59%	1.97%	2.41%
Ibovespa Sao Paulo (Brazil)	134906.07	-0.81%	-1.45%	7.19%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8109.90	0.22%	0.31%	2.10%
Jakarta Composite (Indonesia)	7694.53	0.31%	1.16%	5.29%
KLSE (Malaysia)	1678.19	-0.04%	2.39%	4.17%

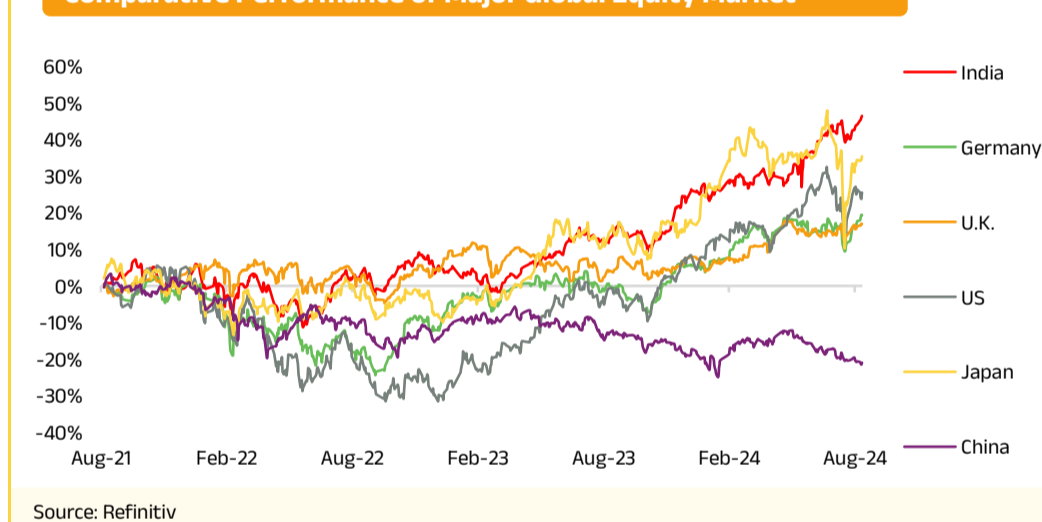
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

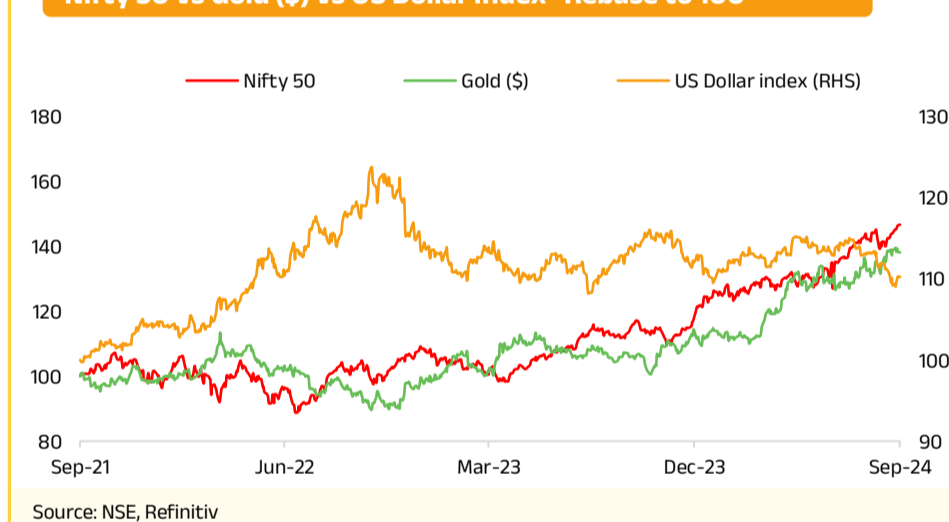
Commodity Prices	2-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,259	-0.59%	0.23%	1.66%
Gold (\$/oz)	2,499.29	-0.15%	-0.70%	2.29%
Silver (INR/1 kg)	82,832	-2.45%	-1.66%	-0.65%
Silver (\$/oz)	28.50	-1.20%	-4.68%	-0.16%
Brent Crude(\$/bbl)	80.06	-2.89%	-2.98%	0.45%
Crude Oil (INR/1 bbl)	6,169.00	-3.13%	-1.70%	-3.44%
NYMEX Crude(\$/bbl) ^[1]	74.42	-3.10%	-4.96%	-0.56%
Natural Gas (INR/1 mmbtu)	178.40	-0.50%	5.19%	8.25%
Aluminium (INR/1 kg)	224.70	-2.11%	-3.27%	5.42%
Copper (INR/1 kg)	802.40	-0.94%	-0.20%	0.43%
Nickel (INR/1 kg)	1,410.00	-1.49%	-0.73%	2.66%
Lead (INR/1 kg)	188.00	-5.46%	-4.15%	-2.01%
Zinc (INR/1 kg)	268.00	-2.55%	-2.24%	4.93%
Mentha Oil (INR/1 kg)	1,007.10	0.45%	-1.27%	0.41%
Baltic Dry Index ^[1]	1,814	-0.71%	2.95%	8.30%

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



Moving Average

Definition: Moving average is a type of a technical indicator used in charts that smoothens random or short-term fluctuations in price movement. In other words, it is used to analyze data points by calculating a series of averages of different subsets of the full data set. It is widely used in technical analysis and there are broad two types of moving average (MA) - Simple and Exponential.



Explanation

MA uses the basic philosophy of averaging and plots a parallel line with the daily price movement to gauge the direction of the current trend. MA is not used to predict the price direction but rather define the current direction with a lag. To calculate MA, a technical analyst use specific period depending upon the time frame such as 14-day, 50-day, 100-day and 200-day. However, analyst can use any period depending upon situation or his or her preference. Among EMA 12 and 26-day are the most popular short-term averages. The extension of MA is crossover MA, which plots two lines of different periods to understand buy and sell signals.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.23	16.10	37.02	15.74
Mid Cap Fund	2.53	24.73	48.06	23.94
Large & Mid Cap Fund	2.74	20.79	43.54	20.33
Small Cap Fund	2.87	22.62	43.99	25.35
Multi Cap Fund	2.90	20.71	43.74	21.83
Focused Fund	2.94	19.03	39.52	17.49
Value Fund	2.47	18.89	47.20	22.61
Contra Fund	2.55	21.13	49.36	24.77
ELSS	2.64	18.75	39.98	19.78
Equity Savings	1.11	7.72	16.09	9.27
Arbitrage Fund	0.46	3.69	7.43	5.67
Dividend Yield Fund	2.29	19.69	49.45	23.46
Aggressive Hybrid Fund	2.16	15.15	31.86	15.21
Balanced Advantage	1.63	10.88	25.21	12.43

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 30 Aug, 2024

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