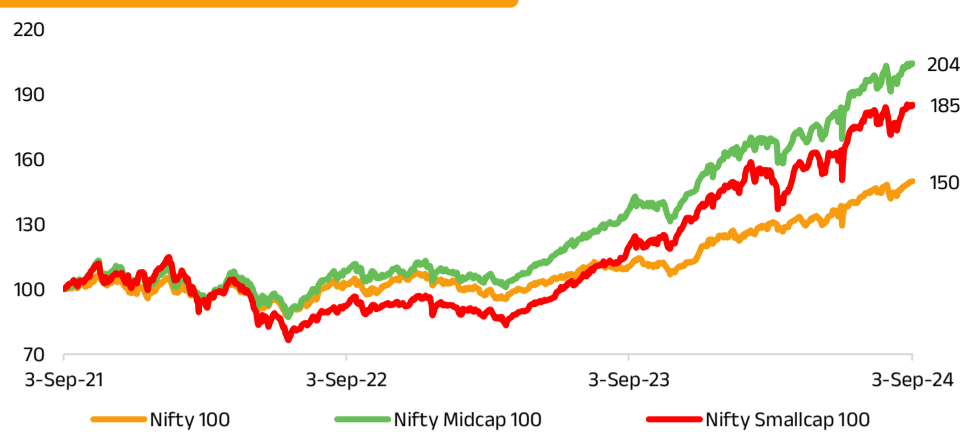


Broad Indices Historical Movement



Source: NSE

Broad Indices

	3-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,279.85	0.00%	1.05%	2.27%
Nifty 100	26,341.70	0.03%	0.99%	2.21%
Nifty 200	14,326.80	0.06%	0.85%	2.24%
Nifty 500	23,788.45	0.12%	0.78%	2.27%
Nifty Large Midcap 250	16,585.85	0.13%	0.60%	2.09%
Nifty Midcap 150	21,913.80	0.23%	0.20%	1.96%
Nifty Next 50	75,413.65	0.10%	0.75%	2.84%
Nifty Smallcap 250	18,264.30	0.59%	0.25%	3.32%

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

Smart Beta Index

Index	3-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,941.75	0.24%	0.61%	2.76%
NIFTY 500 Value 50	15,356.70	-0.15%	-0.16%	0.39%
Nifty 200 Quality 30	22,962.30	0.23%	1.72%	4.70%
Nifty 50 Equal Weight	32,541.35	-0.01%	1.37%	3.02%
NIFTY Alpha Low Volatility 30	30,311.90	0.03%	0.95%	2.59%
Nifty High Beta 50	4,163.04	-0.02%	-0.69%	-2.01%
Nifty Low Volatility 50	25,751.42	0.18%	1.23%	3.23%
Nifty Midcap150 Momentum 50	65,970.10	0.14%	0.34%	2.75%
Nifty PSE	11,427.80	0.05%	-0.03%	-0.89%
Nifty SME Emerge	16,057.21	-0.11%	-0.06%	8.66%
Nifty 100 ESG	5,096.85	0.03%	1.47%	3.24%

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

Sector Indices

Index	3-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	26,034.65	-0.14%	0.47%	1.25%
Nifty Bank	51,689.10	0.49%	0.80%	0.66%
Nifty Consumption	12,085.85	-0.13%	0.85%	2.87%
Nifty Financial	23,922.20	0.82%	1.46%	2.38%
Nifty FMCG	63,485.75	-0.15%	0.80%	2.82%
Nifty Healthcare	14,395.05	-0.06%	1.50%	4.03%
Nifty IT	42,851.30	-0.29%	2.74%	7.86%
Nifty Media	2,064.40	-1.44%	-3.93%	-1.71%
Nifty Metal	9,254.75	-0.56%	-1.89%	-0.64%
Nifty MNC	31,006.95	0.31%	0.20%	1.29%
Nifty Pharma	23,014.30	0.12%	1.26%	5.07%
Nifty Realty	1,045.40	-0.52%	0.70%	0.80%
Nifty Energy	43,477.65	-0.70%	-0.11%	-1.93%

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

Nifty 50 Top 5 Gainers

Company	3-Sep-24	Prev_Day	% Change	1 Week
SBI Life Insurance Company Limited	1,928.65	1,888.75	2.11	4.88
HDFC Standard Life Insurance Company Limited	758.75	745.30	1.80	2.60
ICICI Bank	1,247.70	1,229.95	1.44	1.74
Hero Moto	5,646.50	5,578.20	1.22	5.41
Titan Industries Limited	3,621.15	3,587.55	0.94	1.97

Source: NSE

Nifty 50 Top 5 Losers

Company	3-Sep-24	Prev_Day	% Change	1 Week
Indian Oil	176.13	179	-1.45	1.66
ONGC	322.20	326	-1.23	-2.02
Infosys	1,941.25	1965	-1.18	2.17
Bajaj Finance	7,353.80	7440	-1.16	7.14
JSW Steel	930.95	940	-1.01	-1.38

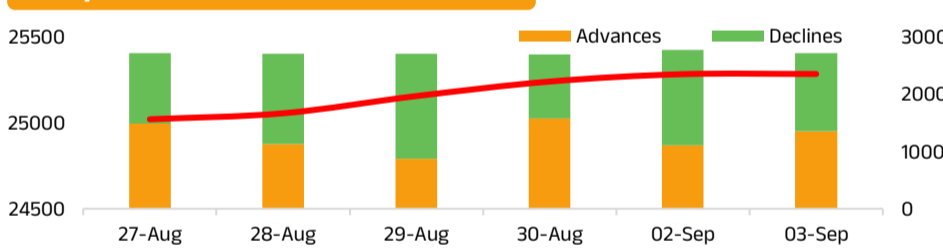
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

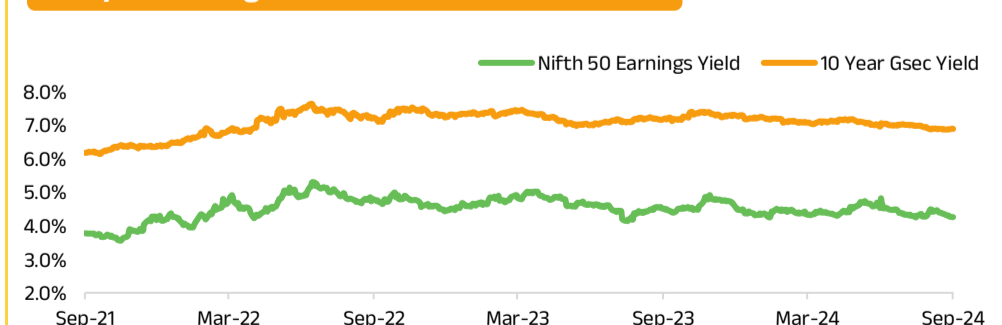
Indian equity markets closed on a flat note amid a lack of fresh catalysts. The key benchmark indices almost remained unchanged from the previous day's close as investors awaited for crucial U.S. economic data this week that could offer more insight about the health of the world's largest economy and the Federal Reserve's policy path.

Bharat Petroleum Corporation, an Indian refiner, and Oil and Natural Gas Corporation, an exploration company, are collaborating to investigate the establishment of a refinery. According to reports, BPCL intends to enhance its integrated refining and petrochemical capabilities over the next five to seven years in order to address the rising energy demand.

Hindustan Aeronautics Limited got approval from the cabinet committee of India for the acquisition of 240 AL-31FP aero-engines for the Su-30 MKI aircraft, with a total expenditure surpassing Rs 26,000 crore. These engines will incorporate more than 54% indigenous content and will be manufactured at HAL's Koraput facility.

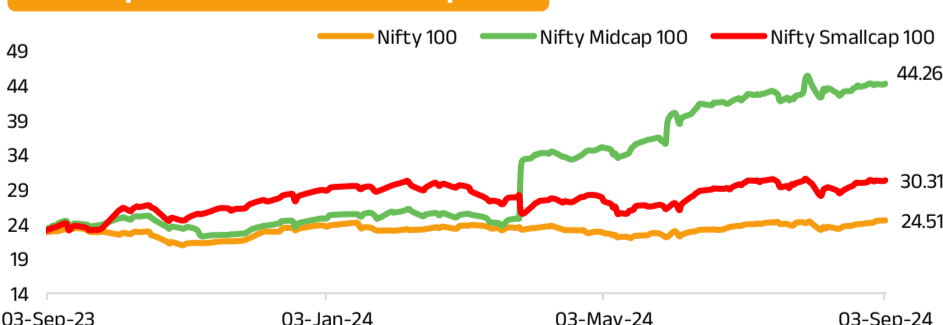
Adani Green Energy announced that its board has sanctioned definitive agreements for an additional investment of \$444 million from TotalEnergies, aimed at establishing a joint venture with the company.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



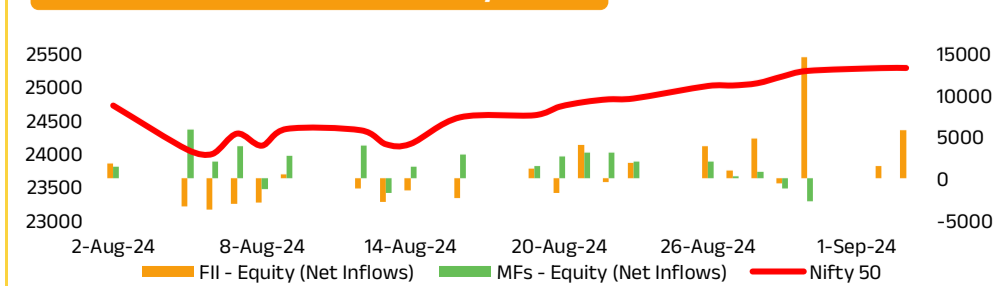
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	5759.81	7,264	46,949	50,149
MF**	-2747.07		52,287	243,712
DII	1896.21	2,253	74,017	310,144

Source: SEBI, NSDL;**As on 30th Aug 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	25354.50	25340.50	0.06%
Near Basis	74.70	61.75	20.97%
Mid Futures	25482.00	25467.80	0.06%
Mid Basis	202.10	189.10	6.87%
Near Open Interest (Cr.)	1.51	1.49	0.76%
Mid Open Interest (Cr.)	0.11	0.11	1.76%
Rollover (%)	7.49	7.30	2.59%
Put Call Ratio (OI)	1.20	1.18	1.72%
Put Call Ratio(Vol)	0.96	1.02	-6.05%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	3145	3746	38574
Index Options	2025866	2028804	416985
Stock Futures	27854	25668	334461
Stock Options	40133	40463	25342
Total	2096999	2098680	815362

Source: NSE

Global Equity Market

Global Indices	3-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3016.59	-2.15%	-1.73%	3.49%
Nasdaq 100 (U.S.)	18958.74	-3.15%	-3.18%	2.81%
FTSE (U.K.)	8298.46	-0.78%	-0.56%	1.51%
DAX Index (Germany)	18747.11	-0.97%	0.35%	6.15%
CAC 40 Index (France)	7575.10	-0.93%	0.12%	4.46%
SSE Composite (China)	2802.98	-0.29%	-1.61%	-3.52%
Nikkei (Japan)	38686.31	-0.04%	1.04%	7.73%
Kospi (South Korea)	2664.63	-0.61%	-0.92%	-0.43%
HangSeng (Hong Kong)	17651.49	-0.23%	-1.25%	4.17%
Strait Times (Singapore)	3480.34	0.50%	2.41%	2.92%
Ibovespa Sao Paulo (Brazil)	134353.48	-0.41%	-1.77%	6.75%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8103.20	-0.08%	0.40%	2.01%
Jakarta Composite (Indonesia)	7616.52	-1.01%	0.25%	4.22%
KLSE (Malaysia)	1676.65	-0.09%	1.47%	4.07%

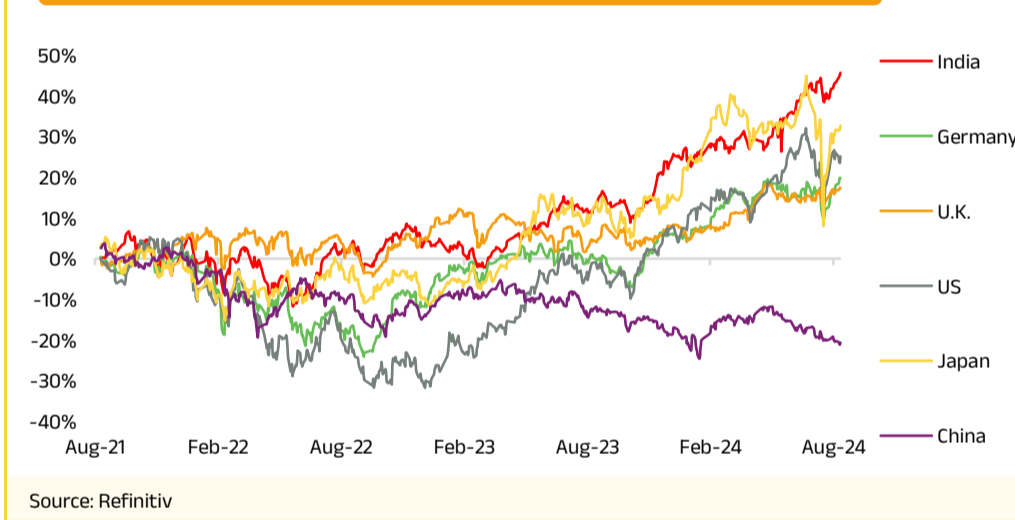
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

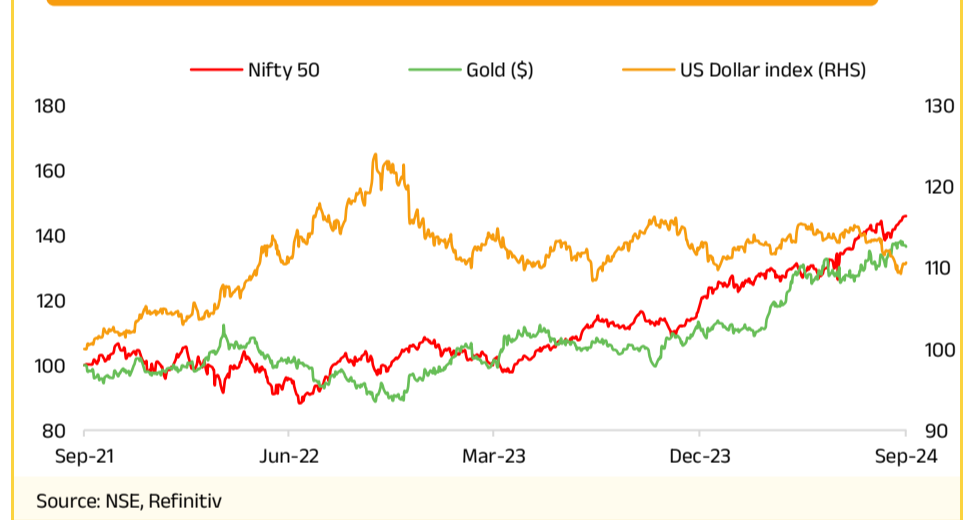
Commodity Prices	3-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,135	-0.17%	-0.42%	1.48%
Gold (\$/oz)	2,492.76	-0.26%	-1.26%	2.02%
Silver (INR/1 kg)	82,046	-0.95%	-4.09%	-1.59%
Silver (\$/oz)	28.05	-1.58%	-6.47%	-1.73%
Brent Crude(\$/bbl)	78.70	-1.70%	-5.98%	-1.25%
Crude Oil (INR/1 bbl)	6,169.00	0.00%	-4.98%	-3.44%
NYMEX Crude(\$/bbl)	71.18	-4.35%	-6.83%	-4.89%
Natural Gas (INR/1 mmbtu)	178.40	0.00%	8.78%	8.25%
Aluminium (INR/1 kg)	224.65	-0.02%	-3.29%	5.40%
Copper (INR/1 kg)	783.50	-2.36%	-3.87%	-1.94%
Nickel (INR/1 kg)	1,400.00	-0.71%	-2.64%	1.93%
Lead (INR/1 kg)	186.60	-0.74%	-4.82%	-2.74%
Zinc (INR/1 kg)	265.15	-1.06%	-3.05%	3.82%
Mentha Oil (INR/1 kg)	1,002.10	-0.50%	-1.18%	-0.09%
Baltic Dry Index ^[1]	1,919	5.79%	11.50%	14.57%

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



Unit Trusts and Mutual Funds

Definition: The history of Mutual Funds in India can be traced back to 1963, when the Unit Trust of India (UTI) was formed with the joint initiative of the Government of India and the Reserve Bank of India (RBI). For over two decades, it remained the only medium for investment in the capital market by the Indians (apart from those who were investing in stocks directly).



Explanation

The history of evolution of mutual funds in India can broadly be divided into four phases. UTI came into existence in 1963 by an Act of Parliament and started functioning under the regulatory and administrative control of the RBI. The first mutual fund scheme, launched by UTI, was known as Unit Scheme 1964. The year 1987 marked the entry of non-UTI public sector mutual funds. The door was thrown open to private sector mutual funds in 1993, which marked a new era in the Indian mutual fund industry. Gradually, many foreign mutual funds started setting up mutual fund houses in India. In February 2003, the Unit Trust of India Act 1963 was repealed and UTI was bifurcated into two separate entities.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.36	16.25	37.07	15.61
Mid Cap Fund	2.92	25.20	48.46	23.94
Large & Mid Cap Fund	3.05	21.15	43.80	20.27
Small Cap Fund	3.48	23.33	44.72	25.46
Multi Cap Fund	3.20	21.05	43.97	21.69
Focused Fund	3.17	19.29	39.70	17.41
Value Fund	2.66	19.11	47.31	22.49
Contra Fund	2.67	21.28	49.43	24.66
ELSS	2.92	19.08	40.23	19.75
Equity Savings	1.15	7.76	16.08	9.23
Arbitrage Fund	0.46	3.68	7.40	5.67
Dividend Yield Fund	2.44	19.87	49.43	23.30
Aggressive Hybrid Fund	2.32	15.33	31.96	15.14
Balanced Advantage	1.73	11.00	25.28	12.39

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 02 Sep, 2024

Disclaimer:

All information contained in this document has been obtained by ICRA Analytics Limited from sources believed by it to be accurate and reliable. Although reasonable care has been taken to ensure that the information herein is true, such information is provided 'as is' without any warranty of any kind, and ICRA Analytics Limited in particular, make no representation or warranty, express or implied, as to the accuracy, timeliness or completeness of any such information. All information contained herein must be construed solely as statements of opinion, and ICRA Analytics Limited shall not be liable for any losses incurred by users from any use of this document or its contents in any manner. Opinions expressed in this document are not the opinions of ICRA Analytics Limited's holding company, ICRA Limited (ICRA), and should not be construed as any indication of credit rating or grading of ICRA for any instruments that have been issued or are to be issued by any entity. Past performance may or may not be sustained in the future.

Aditya Birla Sun Life AMC Limited /Aditya Birla Sun Life Mutual Fund is not guaranteeing/offering/communicating any indicative yield/returns on investments. The sector(s)/stock(s)/issuer(s) mentioned in this document do not constitute any research report/recommendation of the same and the Fund may or may not have any future position in these sector(s)/stock(s)/issuer(s). The information herein is meant only for general reading purposes and the views being expressed only constitute opinions and therefore cannot be considered as guidelines, recommendations or as a professional guide for the readers.

MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.