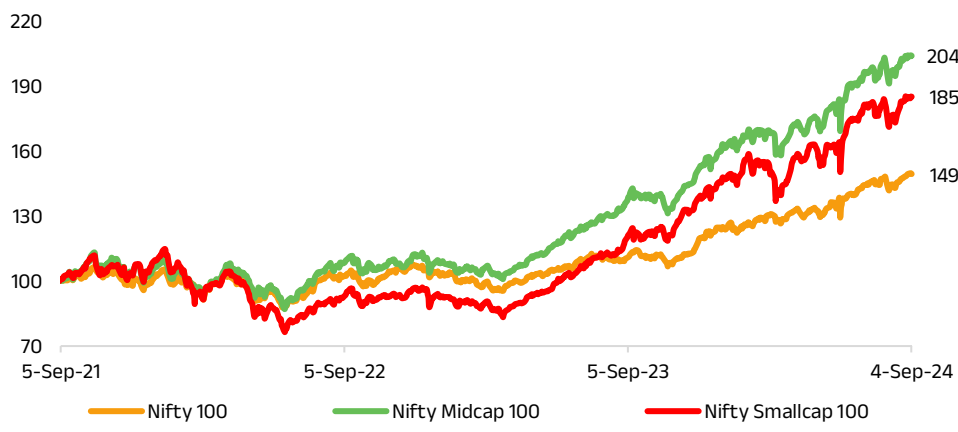


Broad Indices Historical Movement



Source: NSE

Broad Indices

| | 4-Sep-24 | 1 Day | 1 Week | 1 Month |
|------------------------|-----------|--------|--------|---------|
| Nifty 50 | 25,198.70 | -0.32% | 0.58% | 1.95% |
| Nifty 100 | 26,275.75 | -0.25% | 0.61% | 1.96% |
| Nifty 200 | 14,293.85 | -0.23% | 0.53% | 2.00% |
| Nifty 500 | 23,748.90 | -0.17% | 0.56% | 2.10% |
| Nifty Large Midcap 250 | 16,558.05 | -0.17% | 0.43% | 1.91% |
| Nifty Midcap 150 | 21,895.35 | -0.08% | 0.26% | 1.88% |
| Nifty Next 50 | 75,450.55 | 0.05% | 0.49% | 2.89% |
| Nifty Smallcap 250 | 18,320.60 | 0.31% | 0.77% | 3.64% |

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

Smart Beta Index

| Index | 4-Sep-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Nifty 200 Momentum 30 Index | 36,765.45 | -0.48% | -0.22% | 2.27% |
| NIFTY 500 Value 50 | 15,226.46 | -0.85% | -0.72% | -0.46% |
| Nifty 200 Quality 30 | 22,963.30 | 0.00% | 1.49% | 4.71% |
| Nifty 50 Equal Weight | 32,437.95 | -0.32% | 0.79% | 2.69% |
| NIFTY Alpha Low Volatility 30 | 30,340.75 | 0.10% | 0.99% | 2.69% |
| Nifty High Beta 50 | 4,112.75 | -1.21% | -1.78% | -3.20% |
| Nifty Low Volatility 50 | 25,806.38 | 0.21% | 1.43% | 3.45% |
| Nifty Midcap150 Momentum 50 | 65,853.55 | -0.18% | 0.07% | 2.57% |
| Nifty PSE | 11,340.15 | -0.77% | -0.53% | -1.65% |
| Nifty SME Emerge | 16,201.02 | 0.90% | 1.47% | 9.63% |
| Nifty 100 ESG | 5,083.40 | -0.26% | 0.79% | 2.97% |

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

Sector Indices

| Index | 4-Sep-24 | 1 Day | 1 Week | 1 Month |
|-------------------|-----------|--------|--------|---------|
| Nifty Auto | 25,934.25 | -0.39% | 0.21% | 0.85% |
| Nifty Bank | 51,400.25 | -0.56% | 0.50% | 0.10% |
| Nifty Consumption | 12,101.25 | 0.13% | 0.75% | 3.00% |
| Nifty Financial | 23,834.05 | -0.37% | 1.33% | 2.00% |
| Nifty FMCG | 63,742.90 | 0.41% | 1.64% | 3.24% |
| Nifty Healthcare | 14,512.55 | 0.82% | 1.12% | 4.88% |
| Nifty IT | 42,450.50 | -0.94% | 0.13% | 6.85% |
| Nifty Media | 2,066.10 | 0.08% | -2.48% | -1.63% |
| Nifty Metal | 9,185.50 | -0.75% | -2.44% | -1.39% |
| Nifty MNC | 31,027.90 | 0.07% | 0.58% | 1.36% |
| Nifty Pharma | 23,184.40 | 0.74% | 0.85% | 5.85% |
| Nifty Realty | 1,052.20 | 0.65% | 1.54% | 1.45% |
| Nifty Energy | 43,249.85 | -0.52% | -0.34% | -2.45% |

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

Nifty 50 Top 5 Gainers

| Company | 4-Sep-24 | Prev_Day | % Change | 1 Week |
|---------------|-----------|-----------|----------|--------|
| Asian Paints | 3,231.65 | 3,154.85 | 2.43 | 3.40 |
| Grasim Indus | 2,757.65 | 2,706.85 | 1.88 | 1.55 |
| HUL | 2,841.25 | 2,794.30 | 1.68 | 2.78 |
| Sun Pharma | 1,832.85 | 1,811.50 | 1.18 | 1.16 |
| Ultratech Cem | 11,580.45 | 11,460.80 | 1.04 | 3.08 |

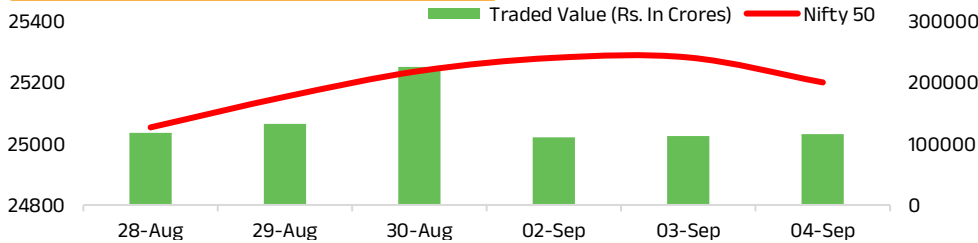
Source: NSE

Nifty 50 Top 5 Losers

| Company | 4-Sep-24 | Prev_Day | % Change | 1 Week |
|------------|----------|----------|----------|--------|
| Wipro | 519.15 | 536 | -3.15 | -2.89 |
| Coal India | 503.65 | 520 | -3.07 | -4.31 |
| ONGC | 314.40 | 322 | -2.42 | -4.09 |
| Hindalco | 666.80 | 679 | -1.78 | -5.43 |
| M&M | 2,749.60 | 2785 | -1.27 | -1.73 |

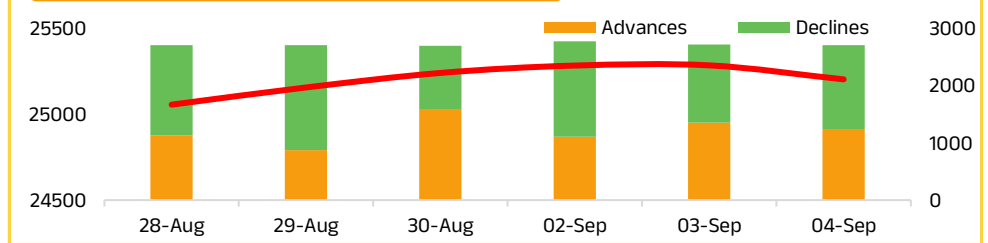
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

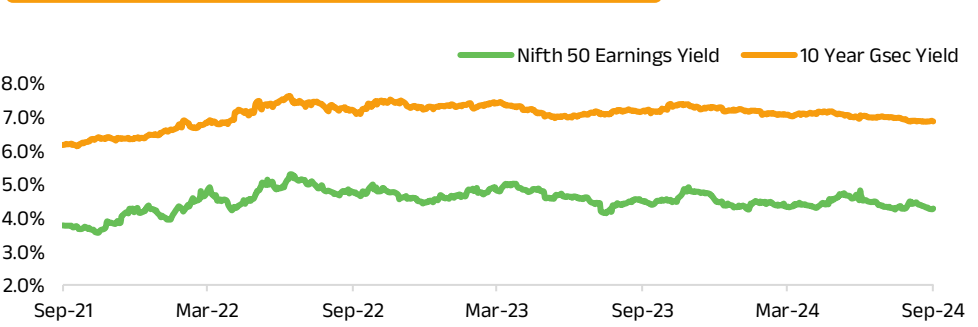
Indian equity markets fell amid weak global cues on concerns about a potential slowdown in the U.S. economy. The key benchmark indices opened lower and continued to trade in red throughout the session as sentiments were dampened following weak U.S. manufacturing data of Aug 2024, which reignited concerns over an economic slowdown in the world's largest economy.

Adani Power intends to undertake a substantial expansion of its Kawai power plant located in Rajasthan by investing up to Rs. 18,000 crore to more than triple the plant's current capacity. Currently, the plant operates at a capacity of 1,320 MW, and will undergo expansion in two phases.

Bharti Airtel announced that it has added more spectrum across all 50 districts in Rajasthan. This will enhance 5G and 4G network capabilities, improving voice and data services for users in the state. The expansion will also extend Airtel's coverage along highways and railways and strengthen its presence in rural areas due to the growing need for connectivity.

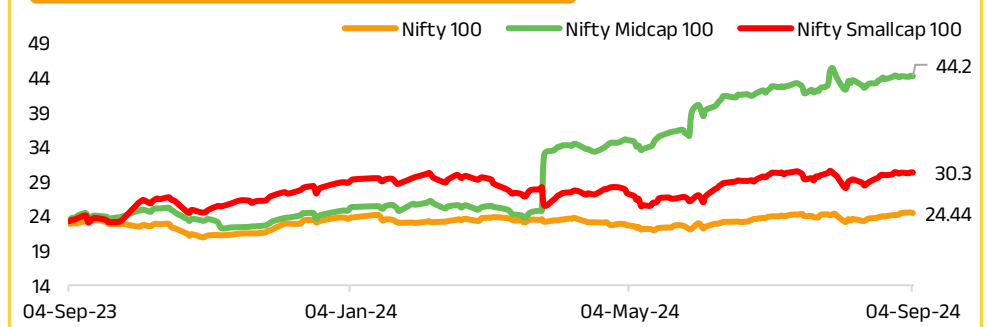
Reliance Industries Limited has obtained incentives amounting to Rs. 3,620 crores for the production of advanced chemistry cell batteries. This achievement complements the 5 GWh capacity previously secured by RIL, resulting in a cumulative total of 15 GWh. The incentives were granted following a rebid conducted by the Ministry of Heavy Industries.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



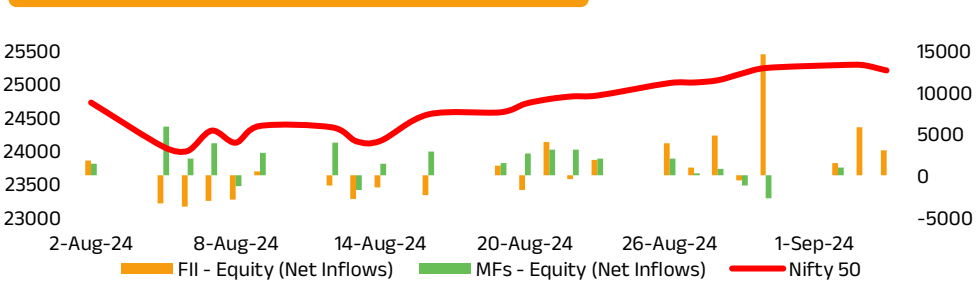
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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 | 3035.79 | 10,300 | 49,985 | 53,185 |
| MF** | 993.57 | 994 | 53,280 | 244,706 |
| DII | 97.35 | 2,350 | 74,115 | 310,242 |

Source: SEBI, NSDL; **As on 2nd Sep 2024;

F&O Trends

| | Latest | Previous | Change % |
|--------------------------|----------|----------|----------|
| Near Futures | 25247.80 | 25354.50 | -0.42% |
| Near Basis | 49.10 | 74.70 | -34.27% |
| Mid Futures | 25378.20 | 25482.00 | -0.41% |
| Mid Basis | 179.45 | 202.10 | -11.21% |
| Near Open Interest (Cr.) | 1.52 | 1.51 | 1.21% |
| Mid Open Interest (Cr.) | 0.11 | 0.11 | -0.34% |
| Rollover (%) | 7.49 | 7.49 | 0.08% |
| Put Call Ratio (OI) | 1.08 | 1.20 | -9.86% |
| Put Call Ratio(Vol) | 0.86 | 0.96 | -10.57% |

Source: NSE

FII Derivative Trade Statistics

| | Buy | Sell | Open Int. |
|---------------|---------|---------|-----------|
| Index Futures | 2764 | 2375 | 39173 |
| Index Options | 2945891 | 2920683 | 440679 |
| Stock Futures | 32782 | 26790 | 331263 |
| Stock Options | 32102 | 32514 | 28276 |
| Total | 3013538 | 2982362 | 839391 |

Source: NSE

Global Equity Market

| Global Indices | 4-Sep-24 | 1 Day | 1 Week | 1 Month |
|-------------------------------|-----------|--------|--------|---------|
| Russell 1000 Index (U.S.) | 3011.15 | -0.18% | -1.29% | 3.31% |
| Nasdaq 100 (U.S.) | 18921.40 | -0.20% | -2.22% | 2.61% |
| FTSE (U.K.) | 8269.60 | -0.35% | -0.89% | 1.16% |
| DAX Index (Germany) | 18591.85 | -0.83% | -1.01% | 5.27% |
| CAC 40 Index (France) | 7500.97 | -0.98% | -1.01% | 3.44% |
| SSE Composite (China) | 2784.28 | -0.67% | -1.87% | -4.17% |
| Nikkei (Japan) | 37047.61 | -4.24% | -3.45% | 3.17% |
| Kospi (South Korea) | 2580.80 | -3.15% | -4.05% | -3.56% |
| HangSeng (Hong Kong) | 17457.34 | -1.10% | -1.33% | 3.02% |
| Strait Times (Singapore) | 3441.38 | -1.12% | 1.48% | 1.77% |
| Ibovespa Sao Paulo (Brazil) | 136110.73 | 1.31% | -0.90% | 8.15% |
| RTS Index (Russia) | NA | NA | NA | NA |
| S&P/ASX 200 (Australia) | 7950.50 | -1.88% | -1.50% | 0.09% |
| Jakarta Composite (Indonesia) | 7672.90 | 0.74% | 0.18% | 4.99% |
| KLSE (Malaysia) | 1670.24 | -0.38% | -0.30% | 3.67% |

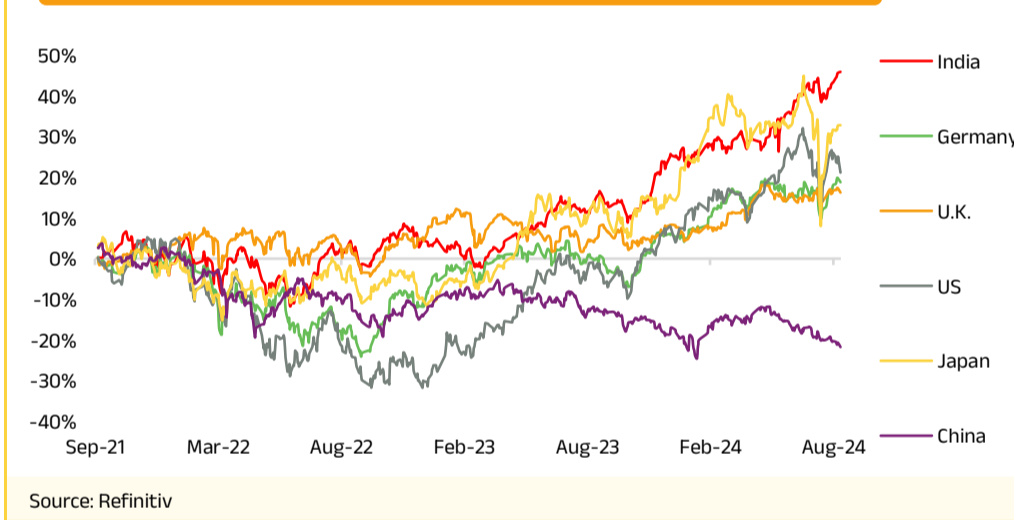
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

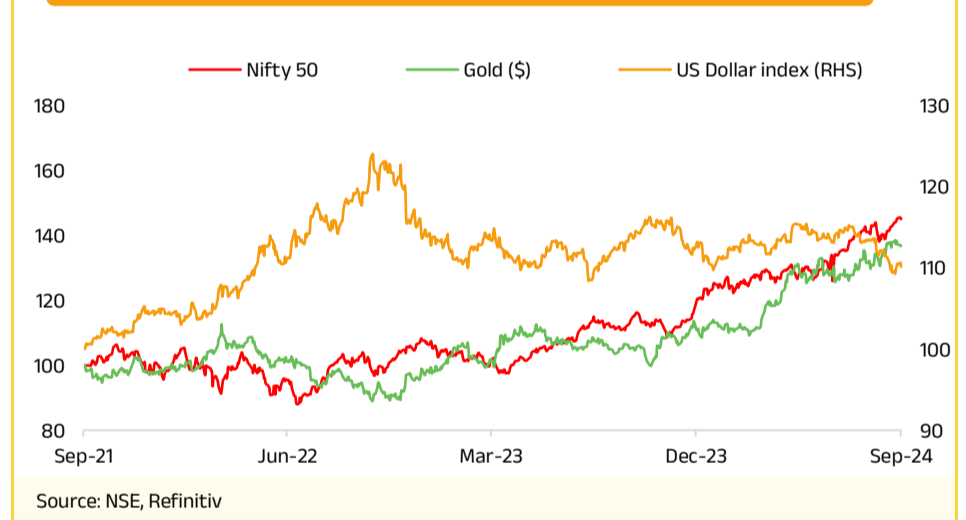
| Commodity Prices | 4-Sep-24 | 1 Day | 1 Week | 1 Month |
|---------------------------|----------|--------|--------|---------|
| Gold (INR/10 gm) | 71,004 | -0.18% | -0.58% | 1.30% |
| Gold (\$/oz) | 2,494.19 | 0.06% | -0.32% | 2.08% |
| Silver (INR/1 kg) | 81,214 | -1.01% | -4.15% | -2.59% |
| Silver (\$/oz) | 28.29 | 0.84% | -2.83% | -0.91% |
| Brent Crude(\$/bbl) | 76.91 | -2.27% | -6.45% | -3.50% |
| Crude Oil (INR/1 bbl) | 5,905.00 | -4.28% | -6.86% | -7.58% |
| NYMEX Crude(\$/bbl) | 70.01 | -1.64% | -7.14% | -6.45% |
| Natural Gas (INR/1 mmbtu) | 184.90 | 3.64% | 15.71% | 12.20% |
| Aluminium (INR/1 kg) | 221.45 | -1.42% | -4.61% | 3.89% |
| Copper (INR/1 kg) | 786.20 | 0.34% | -2.57% | -1.60% |
| Nickel (INR/1 kg) | 1,387.20 | -0.91% | -2.82% | 1.00% |
| Lead (INR/1 kg) | 191.50 | 2.63% | -1.42% | -0.18% |
| Zinc (INR/1 kg) | 265.40 | 0.09% | -1.81% | 3.92% |
| Mentha Oil (INR/1 kg) | 1,006.50 | 0.44% | -0.14% | 0.35% |
| Baltic Dry Index | 1,902 | -2.31% | 8.38% | 13.55% |

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



Cyclical Stocks

Definition: Cyclical stocks are referred to as those stocks that move in tandem with the economy as they have high correlation with the economic cycle.



Explanation

When the economy is going through a downturn, the profits of a cyclical company tend to drop and so its share price. Conversely, when the economy is on the upswing, its share price tends to go up with the profit growth. Cyclical stocks are opposite of defensive stocks as these are directly linked to the economic cycle while defensive stocks remain unaffected by different economic phases. Economic indicators like inflation, interest rates etc have direct bearing on these stocks. Investors with high risk appetite generally prefer cyclical stocks while those who cannot bear high risk normally settle for defensive stocks.

Mutual Fund Category Performance - Equity & Hybrid

| Category | 1 Month | 6 Month | 1 Year | 3 Year |
|------------------------|---------|---------|--------|--------|
| Large Cap Fund | 2.19 | 15.64 | 36.34 | 15.52 |
| Mid Cap Fund | 2.87 | 24.51 | 47.92 | 23.90 |
| Large & Mid Cap Fund | 2.93 | 20.41 | 43.18 | 20.20 |
| Small Cap Fund | 3.64 | 23.32 | 44.21 | 25.50 |
| Multi Cap Fund | 3.12 | 20.41 | 43.27 | 21.63 |
| Focused Fund | 3.09 | 18.73 | 39.19 | 17.35 |
| Value Fund | 2.44 | 18.21 | 46.20 | 22.38 |
| Contra Fund | 2.59 | 20.41 | 48.54 | 24.60 |
| ELSS | 2.81 | 18.59 | 39.52 | 19.69 |
| Equity Savings | 1.18 | 7.61 | 16.02 | 9.23 |
| Arbitrage Fund | 0.50 | 3.66 | 7.48 | 5.68 |
| Dividend Yield Fund | 2.26 | 18.87 | 48.08 | 23.21 |
| Aggressive Hybrid Fund | 2.23 | 14.84 | 31.44 | 15.09 |
| Balanced Advantage | 1.69 | 10.68 | 24.91 | 12.36 |

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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