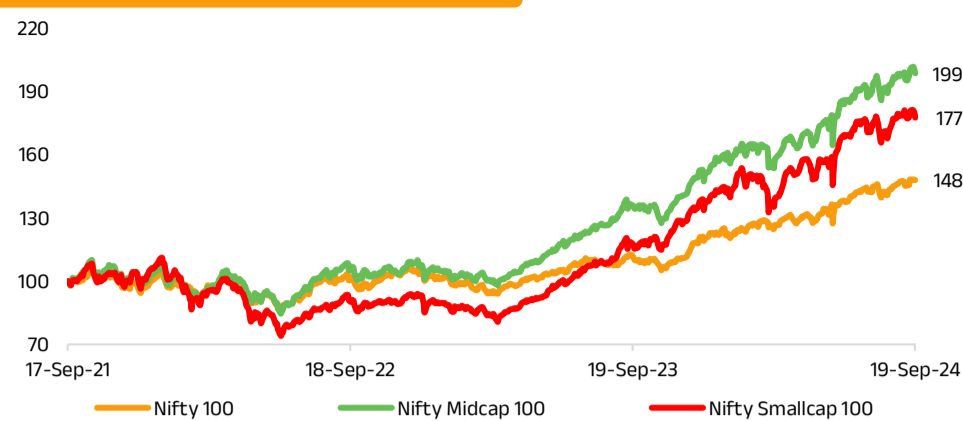


## Broad Indices Historical Movement



Source: NSE

## Broad Indices

	19-Sep-24	1 Day	1 Week	1 Month
Nifty 50	25,415.80	0.15%	0.11%	3.43%
Nifty 100	26,425.25	0.02%	-0.14%	3.07%
Nifty 200	14,367.00	-0.09%	-0.19%	3.02%
Nifty 500	23,853.95	-0.19%	-0.22%	3.09%
Nifty Large Midcap 250	16,631.60	-0.25%	-0.25%	2.97%
Nifty Midcap 150	21,965.15	-0.52%	-0.37%	2.87%
Nifty Next 50	74,419.55	-0.69%	-1.36%	1.43%
Nifty Smallcap 250	18,270.40	-1.11%	-0.61%	3.59%

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

## Smart Beta Index

Index	19-Sep-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	36,037.30	-1.00%	-1.08%	0.13%
NIFTY 500 Value 50	14,633.53	-1.05%	-1.65%	-2.41%
Nifty 200 Quality 30	22,975.70	-0.25%	-1.65%	3.33%
Nifty 50 Equal Weight	32,584.15	-0.04%	-0.37%	3.75%
NIFTY Alpha Low Volatility 30	30,396.50	0.18%	-0.12%	3.16%
Nifty High Beta 50	3,996.84	-1.46%	-1.67%	-2.65%
Nifty Low Volatility 50	25,985.91	0.36%	-0.43%	4.62%
Nifty Midcap150 Momentum 50	65,972.80	-1.22%	0.85%	2.68%
Nifty PSE	10,634.40	-1.61%	-3.02%	-6.01%
Nifty SME Emerge	15,762.70	-1.50%	-3.65%	3.06%
Nifty 100 ESG	5,107.70	-0.05%	-0.38%	3.88%

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

## Sector Indices

Index	19-Sep-24	1 Day	1 Week	1 Month
Nifty Auto	25,907.65	0.40%	0.50%	2.12%
Nifty Bank	53,037.60	0.54%	2.44%	5.30%
Nifty Consumption	12,549.65	0.62%	0.15%	6.40%
Nifty Financial	24,403.65	0.32%	1.91%	6.46%
Nifty FMCG	64,975.80	0.56%	-0.82%	4.25%
Nifty Healthcare	14,505.30	-0.19%	-1.46%	4.01%
Nifty IT	41,945.60	-0.34%	-2.80%	1.72%
Nifty Media	2,056.10	-2.45%	-1.32%	-1.18%
Nifty Metal	9,251.20	-0.64%	-0.43%	0.97%
Nifty MNC	31,211.25	0.09%	-0.42%	2.01%
Nifty Pharma	22,930.15	-0.41%	-2.13%	3.11%
Nifty Realty	1,069.00	0.49%	3.22%	1.79%
Nifty Energy	42,326.90	-0.06%	-0.40%	-2.32%

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

## Nifty 50 Top 5 Gainers

Company	19-Sep-24	Prev_Day	% Change	1 Week
NTPC	423.95	414.15	2.37	4.72
Kotak Bank	1,871.95	1,839.70	1.75	2.44
Titan Industries Limited	3,780.95	3,725.35	1.49	0.44
HUL	2,911.75	2,875.85	1.25	-1.51
Maruti	12,351.50	12,204.10	1.21	-0.40

Source: NSE

## Nifty 50 Top 5 Losers

Company	19-Sep-24	Prev_Day	% Change	1 Week
BPCL	324.45	336	-3.47	-5.77
Indian Oil	165.04	168	-2.02	-4.74
Coal India	477.95	487	-1.88	-3.57
ONGC	285.25	290	-1.77	-2.99
United Phos	594.80	605	-1.70	-3.26

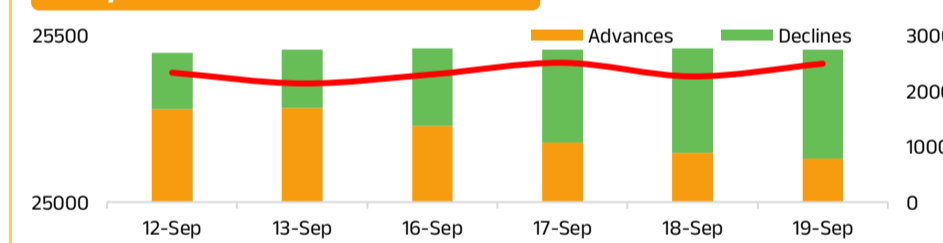
Source: NSE

## Nifty 50 vs NSE Trading Volume



Source: NSE

## Nifty 50 vs Advances & Declines



Source: NSE

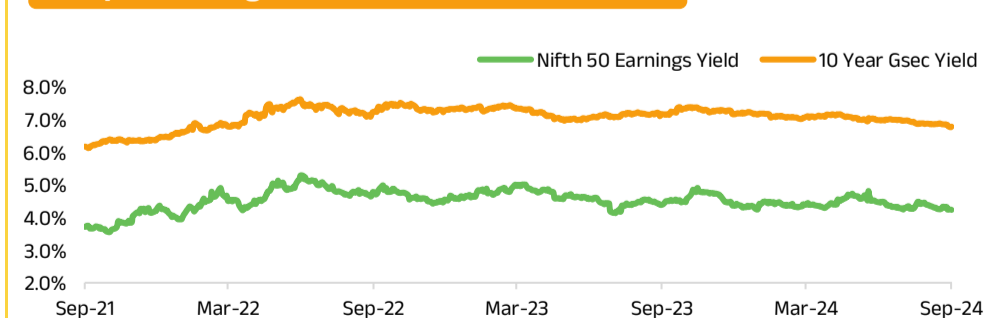
Indian equity markets closed with marginal gains after the U.S. Federal Reserve reduced the interest rate as expected. The key benchmark indices opened on higher note as investors reacted positively to the U.S. Federal Reserve's decision to cut interest rate by 50 bps, signalling further easing in coming months to keep the labour market from slowing too much. However, markets witnessed some profit booking at higher levels amid signs of escalating tensions in the Middle East.

Maruti Suzuki India is making arrangements to establish approximately 25,000 electric vehicle charging stations ahead of the launch of its first electric vehicle, a midsize SUV named Concept eVX. The automobile manufacturer intends to utilize its extensive network of more than 5,100 service centers located in 2,300 cities and is currently engaging in talks with oil marketing firms and energy companies to establish a strong charging infrastructure.

Vistra, U.S. utility company, declared its intention to purchase the remaining 15% equity stake it does not currently possess in its subsidiary, Vistra Vision, for approximately \$3.25 billion in cash.

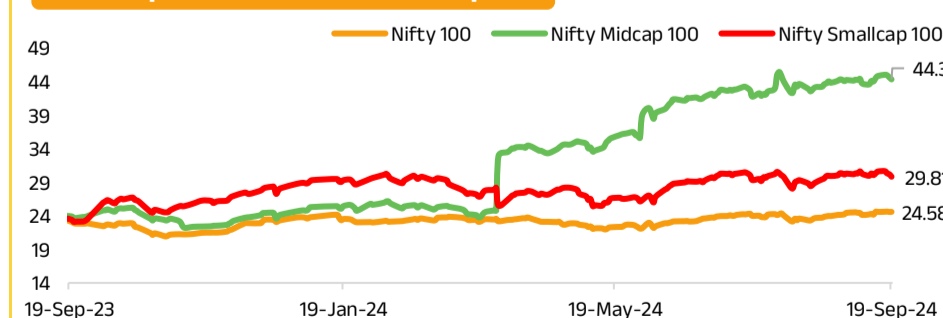
Salesforce, an entity dedicated to customer relationship management, is eager to broaden its presence in India and is seeking additional space within the country. According to reports, the company, which has centers in Bengaluru and Hyderabad to support global operations, is looking for space to expand in India currently.

## Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



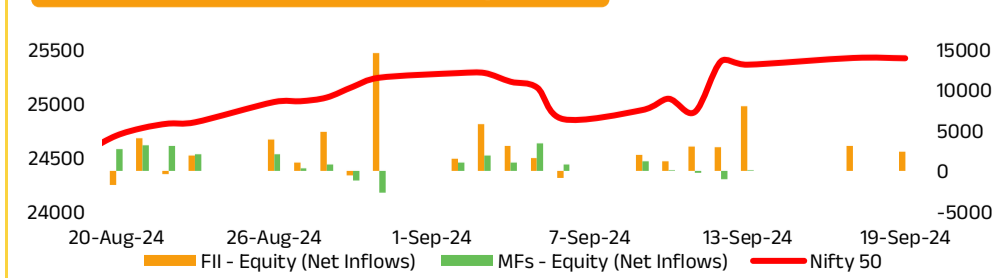
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

## PE Comparison across Market cap



Source: NSE

## FII & Mutual Funds Flows Vs Nifty 50



Source: FPI NSDL, SEBI, NSE

## Institutional Flows (Equity)

Description	INR Cr.			
	Net	MTD	QTD	YTD
FII	2380.95	33,289	72,974	76,175
MF**	83.95	7,985	60,272	251,698
DII	2012.86	13,680	85,444	321,572

Source: SEBI, NSDL,\*\*As on 13th Sep 2024;

## F&O Trends

	Latest	Previous	Change %
Near Futures	25489.10	25396.10	0.37%
Near Basis	73.30	18.55	295.15%
Mid Futures	25611.80	25519.80	0.36%
Mid Basis	195.95	142.25	37.75%
Near Open Interest (Cr.)	1.30	1.32	-1.59%
Mid Open Interest (Cr.)	0.22	0.19	20.44%
Rollover (%)	16.98	14.48	17.25%
Put Call Ratio (OI)	0.97	1.13	-14.45%
Put Call Ratio(Vol)	1.10	0.91	20.60%

Source: NSE

## FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	5306	3887	41961
Index Options	4269583	4230265	426546
Stock Futures	34383	32220	337208
Stock Options	68650	70475	60064
Total	4377923	4336848	865778

Source: NSE

## Global Equity Market

Global Indices	19-Sep-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	3120.82	1.72%	2.31%	2.06%
Nasdaq 100 (U.S.)	19839.83	2.56%	2.15%	0.37%
FTSE (U.K.)	8328.72	0.91%	1.06%	-0.34%
DAX Index (Germany)	19002.38	1.55%	2.61%	3.15%
CAC 40 Index (France)	7615.41	2.29%	2.43%	1.51%
SSE Composite (China)	2736.02	0.69%	0.70%	-5.45%
Nikkei (Japan)	37155.33	2.13%	0.87%	-0.62%
Kospi (South Korea)	2580.80	0.21%	0.34%	-3.50%
HangSeng (Hong Kong)	18013.16	2.00%	4.48%	2.52%
Strait Times (Singapore)	3633.18	1.13%	2.16%	8.27%
Ibovespa Sao Paulo (Brazil)	133122.67	-0.47%	-0.68%	-1.96%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8191.90	0.61%	1.44%	2.65%
Jakarta Composite (Indonesia)	7905.39	0.97%	1.38%	5.87%
KLSE (Malaysia)	1665.65	0.30%	1.67%	1.03%

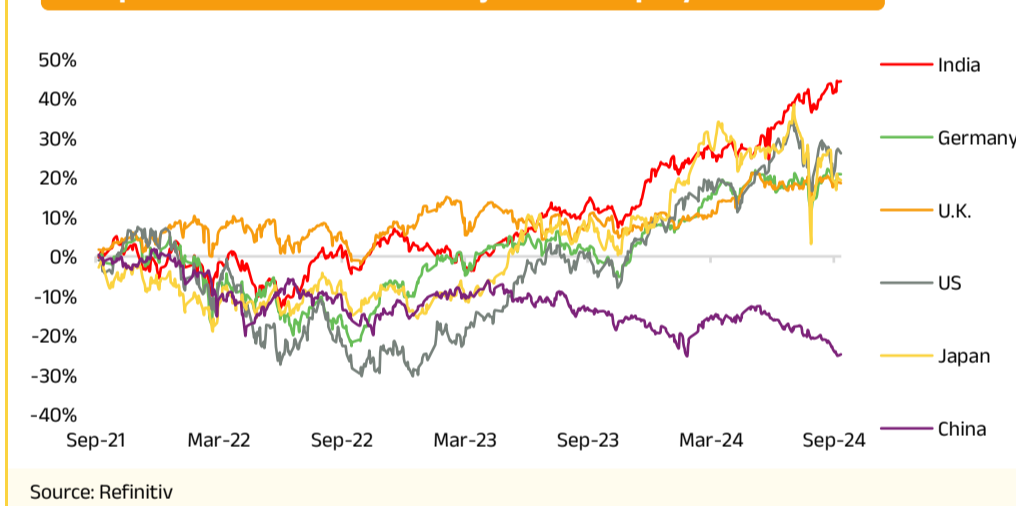
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

## Global & Domestic Commodity Market

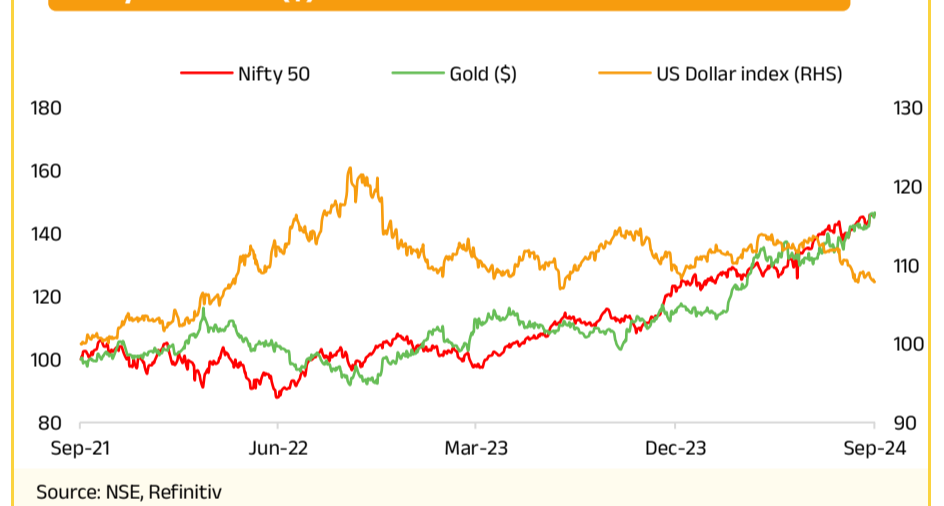
Commodity Prices	19-Sep-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	73,282	0.59%	2.43%	4.29%
Gold (\$/oz)	2,586.48	1.08%	1.08%	3.30%
Silver (INR/1 kg)	88,588	1.60%	6.58%	8.72%
Silver (\$/oz)	30.79	2.41%	2.93%	4.44%
Brent Crude(\$/bbl)	78.17	1.84%	2.79%	-5.01%
Crude Oil (INR/1 bbl)	5,944.00	-0.40%	5.18%	-7.63%
NYMEX Crude(\$/bbl)	72.76	1.38%	4.26%	-3.85%
Natural Gas (INR/1 mmbtu)	191.50	-1.69%	0.47%	7.46%
Aluminium (INR/1 kg)	234.05	0.88%	4.02%	7.36%
Copper (INR/1 kg)	818.50	0.86%	2.07%	3.29%
Nickel (INR/1 kg)	1,391.40	1.39%	0.81%	1.83%
Lead (INR/1 kg)	195.50	1.22%	1.22%	0.85%
Zinc (INR/1 kg)	273.30	1.26%	3.27%	3.19%
Mentha Oil (INR/1 kg)	993.50	0.52%	-0.26%	-0.48%
Baltic Dry Index <sup>[1]</sup>	1,890	-0.58%	-1.92%	10.66%

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



### Double Dip Recession

Definition: When an economy or a country's Gross Domestic Product (GDP) growth is negative for the second time following a short period of positive growth, the phenomenon is termed as double dip recession.



### Explanation

This type of pattern or movement is extremely damaging for an economy. It hits the confidence of consumers and businesses in the country. Due to this, double dip recession may sometimes lead to a prolonged period of recession before final recovery. The first recession often leads to layoffs and spending cuts, as a result of which the demand for goods and services fall, leading to the second recession.

## Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.36	20.30	33.64	15.22
Mid Cap Fund	3.43	32.27	47.34	23.35
Large & Mid Cap Fund	3.43	26.94	41.59	19.76
Small Cap Fund	3.53	33.09	44.57	24.62
Multi Cap Fund	3.54	27.52	42.07	21.07
Focused Fund	4.35	24.66	37.84	17.24
Value Fund	2.64	24.37	43.10	21.85
Contra Fund	3.58	27.11	46.29	24.08
ELSS	3.46	24.93	37.77	19.19
Equity Savings	1.38	9.34	15.42	9.13
Arbitrage Fund	0.50	3.56	7.26	5.71
Dividend Yield Fund	1.65	24.29	43.53	22.31
Aggressive Hybrid Fund	2.79	19.01	30.18	14.86
Balanced Advantage	2.03	13.54	23.44	12.29

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.

<sup>[1]</sup> Data as on 18 Sep, 2024

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