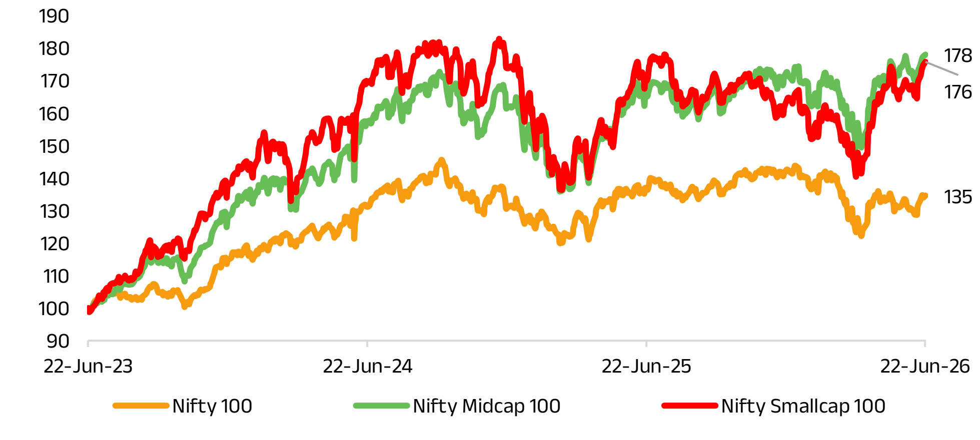
Daily Equity Market Pulse - June 23, 2026

Aditya Birla Sun Life Mutual Fund

ADITYA BIRLA CAPITAL MUTUAL FUNDS

Broad Indices Historical Movement



Source: NSE

Broad Indices

	22-Jun-26	1 Day	1 Week	1 Month
Nifty 50	24,102.90	0.37%	1.04%	1.62%
Nifty 100	25,209.55	0.49%	1.21%	2.19%
Nifty 200	13,975.20	0.46%	1.35%	2.19%
Nifty 500	23,261.85	0.51%	1.62%	2.70%
Nifty Large Midcap 250	16,684.30	0.46%	1.70%	2.36%
Nifty Midcap 150	23,073.05	0.44%	2.16%	2.53%
Nifty Next 50	73,073.20	0.99%	1.94%	4.71%
Nifty Smallcap 250	17,849.75	0.77%	3.22%	6.40%

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

Smart Beta Index

Index	22-Jun-26	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	31,347.00	0.30%	0.89%	3.50%
NIFTY 500 Value 50	16,614.90	0.49%	0.68%	0.63%
Nifty 200 Quality 30	20,035.40	-0.10%	0.96%	-0.74%
Nifty 50 Equal Weight	32,760.70	0.23%	1.15%	0.99%
NIFTY Alpha Low Volatility 30	26,374.55	0.29%	1.09%	2.05%
Nifty High Beta 50	4,377.90	0.77%	2.20%	5.42%
Nifty Low Volatility 50	24,351.95	0.32%	0.90%	0.31%
Nifty Midcap150 Momentum 50	64,796.45	0.37%	1.71%	3.38%
Nifty PSE	10,246.80	0.67%	2.94%	-1.12%
Nifty SME Emerge	14,104.40	0.45%	2.60%	3.03%
Nifty 100 ESG	4,917.95	0.48%	1.22%	2.31%

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

Sector Indices

Index	22-Jun-26	1 Day	1 Week	1 Month
Nifty Auto	26,703.45	0.45%	-1.02%	2.64%
Nifty Bank	57,935.60	0.43%	1.29%	7.18%
Nifty Consumption	11,607.85	-0.12%	1.62%	2.63%
Nifty Financial	26,585.55	0.58%	1.18%	4.13%
Nifty FMCG	49,355.10	-0.41%	0.64%	-1.78%
Nifty Healthcare	15,832.75	1.05%	2.22%	1.03%
Nifty IT	27,628.55	0.74%	-1.57%	-4.44%
Nifty Media	1,536.95	1.42%	3.46%	11.81%
Nifty Metal	13,091.20	0.54%	0.06%	-1.36%
Nifty MNC	32,811.65	0.39%	1.28%	2.68%
Nifty Pharma	24,762.90	1.24%	2.24%	0.77%
Nifty Realty	815.15	0.40%	1.89%	5.26%
Nifty Energy	40,773.80	0.56%	3.24%	1.33%

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

Nifty 50 Top 5 Gainers

Company	22-Jun-26	Prev_Day	% Change	1 Week
Cipla	1,415.70	1,351.80	4.73	2.49
Tech Mahindra	1,435.20	1,409.60	1.82	0.67
Sun Pharma	1,862.90	1,838.30	1.34	3.15
Infosys	1,065.40	1,051.40	1.33	-6.12
RIL	1,326.50	1,309.50	1.30	1.49

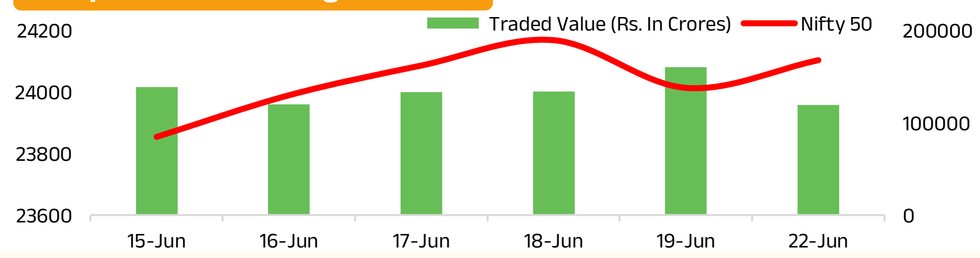
Source: NSE

Nifty 50 Top 5 Losers

Company	22-Jun-26	Prev_Day	% Change	1 Week
IndusInd Bank	921.05	947	-2.79	-1.30
Asian Paints	2,674.00	2733	-2.16	-2.38
Titan Industries Limited	4,372.50	4420	-1.07	2.08
Power Grid	289.75	292	-0.86	1.42
United Phos	605.50	609	-0.52	-1.80

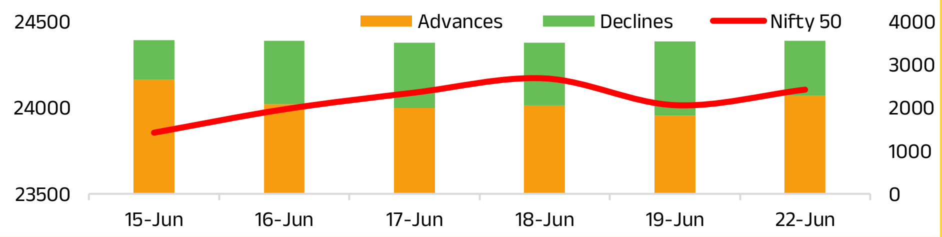
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

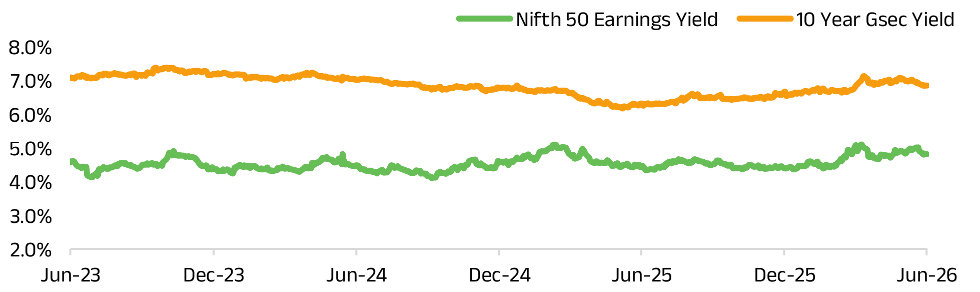
Indian stock markets rose with benchmark indices ending higher amid easing crude oil prices, fresh foreign fund inflows and improved global sentiment driven by optimism surrounding US-Iran diplomatic negotiations.

ArcelorMittal said it has partnered with Amazon Web Services (AWS) to automate its global operations using the US tech major's cloud and AI capabilities.

Aurobindo Pharma said its arm, Aurobindo Pharma USA, Inc., has received approval from the US Federal Trade Commission (FTC) for its $250 million acquisition of Lannett Company LLC.

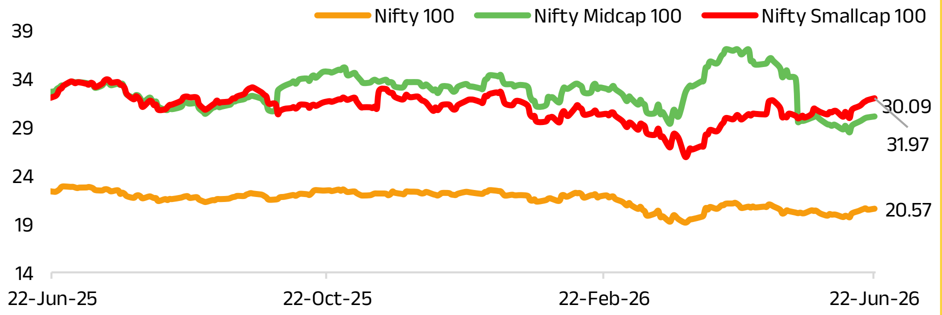
Car market leader Maruti Suzuki India Ltd said it will set up advanced manufacturing labs at five Industrial Training Institutes in Gujarat. The company has signed a Memorandum of Understanding (MoU) with the Directorate of Employment and Training (DET), Government of Gujarat, for this purpose, Maruti Suzuki India Ltd (MSIL) said in a statement.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



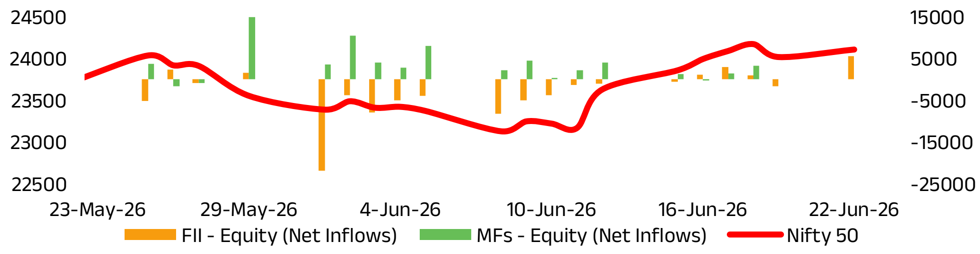
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	5526.92	-54,944	-148,755	-279,876
MF**	3113.97	46,811	138,002	290,612
DII	1035.72	66,091	196,857	444,182

Source: SEBI, NSDL;**As on 18th Jun 2026;

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F&O Trends

	Latest	Previous	Change %
Near Futures	24123.80	24056.90	0.28%
Near Basis	20.90	43.80	-52.28%
Mid Futures	24220.80	24142.70	0.32%
Mid Basis	117.90	129.60	-9.03%
Near Open Interest (Cr.)	1.61	1.65	-2.38%
Mid Open Interest (Cr.)	0.25	0.24	3.75%
Rollover (%)	16.86	16.10	4.73%
Put Call Ratio (OI)	0.97	0.91	6.09%
Put Call Ratio(Vol)	0.94	1.04	-8.87%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	1870	2658	49544
Index Options	1123305	1120467	561406
Stock Futures	26385	29731	477576
Stock Options	38539	37815	95223
Total	1190098	1190671	1183748

Source: NSE

Global Equity Market

Global Indices	22-Jun-26	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	4065.65	-0.38%	-1.11%	0.16%
Nasdaq 100 (U.S.)	30347.08	-0.19%	-0.64%	2.94%
FTSE (U.K.)	10437.85	0.72%	0.07%	-0.27%
DAX Index (Germany)	25139.69	0.62%	0.99%	1.01%
CAC 40 Index (France)	8400.11	-0.25%	0.19%	3.50%
SSE Composite (China)	4163.10	1.78%	1.63%	1.22%
Nikkei (Japan)	72353.96	1.55%	4.38%	14.23%
Kospi (South Korea)	9114.55	0.69%	6.65%	16.14%
HangSeng (Hong Kong)	23768.52	-0.65%	-4.32%	-7.18%
Strait Times (Singapore)	5204.01	0.22%	2.50%	2.68%
Ibovespa Sao Paulo (Brazil)	170370.38	1.21%	-0.03%	-3.31%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	8816.10	-0.14%	-1.10%	1.84%
Jakarta Composite (Indonesia)	6116.69	-0.98%	-2.21%	-0.74%
KLSE (Malaysia)	1700.84	-0.65%	0.56%	-0.69%

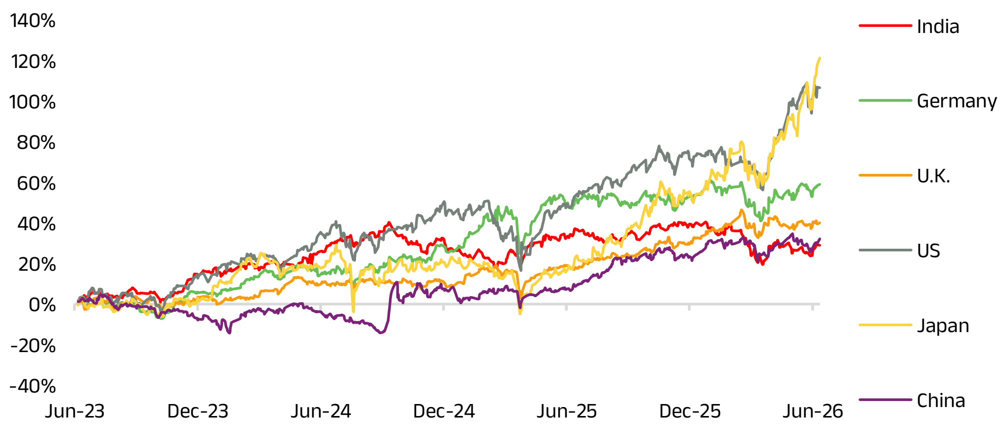
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

Commodity Prices	22-Jun-26	1 Day	1 Week	1 Month
Gold (INR/10 gm)	146,740	1.48%	-2.26%	-6.86%
Gold ($/oz)	4,190.43	0.73%	-2.68%	-7.06%
Silver (INR/1 kg)	237,793	2.57%	-5.39%	-10.70%
Silver ($/oz)	65.18	0.43%	-6.91%	-13.66%
Brent Crude($/bbl)	78.20	-2.69%	-8.47%	-29.44%
Crude Oil (INR/1 bbl)	7,222.00	0.00%	-10.80%	-22.18%
NYMEX Crude($/bbl)	78.69	-1.76%	-6.77%	-21.43%
Natural Gas (INR/1 mmbtu)	304.80	0.00%	2.42%	4.85%
Aluminium (INR/1 kg)	361.30	0.53%	-2.86%	-7.22%
Copper (INR/1 kg)	1,336.50	0.47%	-1.71%	-2.40%
Nickel (INR/1 kg)	1,715.30	0.41%	-1.12%	-5.27%
Lead (INR/1 kg)	207.00	0.24%	-0.65%	-3.27%
Zinc (INR/1 kg)	372.95	-0.01%	0.70%	-0.41%
Mentha Oil (INR/1 kg)	1,116.50	2.25%	4.18%	2.90%
Baltic Dry Index	2,684	-1.40%	-1.32%	-10.26%

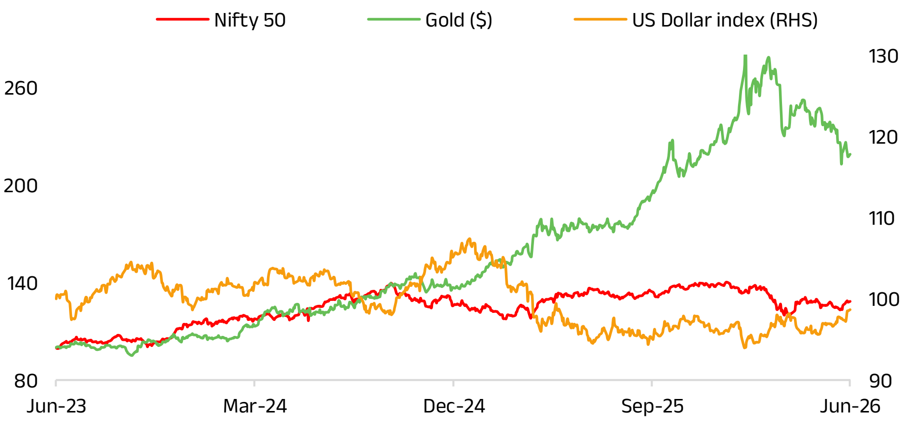
Source: Refinitiv, MCX; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

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

Price-to-Earnings Ratio

Definition: Price-to-Earnings Ratio is a valuation measure that compares a company's stock price to its earnings per share. It helps investors assess how much they are willing to pay for each unit of earnings and provides a simple way to evaluate whether a stock appears relatively expensive or affordable.

Explanation

The Price-to-Earnings Ratio is widely used to gauge market expectations about a company's future performance. A higher ratio often suggests that investors anticipate stronger growth potential, while a lower ratio may indicate modest expectations or potential undervaluation. However, the ratio should not be viewed in isolation, as it can vary across industries and business models. Comparing the ratio with peers or historical trends can provide deeper insight into valuation. Investors typically combine this metric with other fundamental indicators to form a more complete understanding of a company's financial health and long-term potential.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	2.67	-4.47	-0.88	11.71
Flexi Cap Fund	3.54	-1.11	2.36	13.83
Mid Cap Fund	3.54	4.16	8.16	19.50
Large & Mid Cap Fund	3.34	0.16	3.87	16.12
Small Cap Fund	6.43	9.43	10.13	18.03
Multi Cap Fund	4.05	2.16	5.35	16.91
Focused Fund	3.51	-0.86	2.68	13.84
Value Fund	3.15	-0.42	4.04	15.97
Contra Fund	2.33	-4.33	0.13	15.92
ELSS	3.64	-0.42	2.34	14.15
Equity Savings	1.37	0.76	3.98	8.73
Arbitrage Fund	0.65	2.93	5.69	6.66
Dividend Yield Fund	1.91	-1.29	2.32	15.66
Aggressive Hybrid Fund	2.62	-1.22	2.01	12.19
Balanced Advantage	2.15	-1.17	1.84	10.11

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.