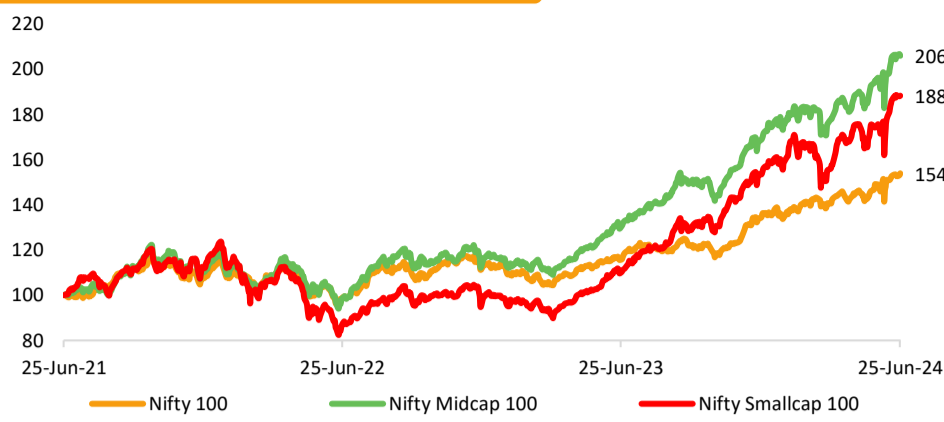


Broad Indices Historical Movement



Source: NSE

Broad Indices

	25-Jun-24	1 Day	1 Week	1 Month
Nifty 50	23,721.30	0.78%	0.69%	3.33%
Nifty 100	24,757.80	0.55%	0.30%	3.24%
Nifty 200	13,451.05	0.40%	0.22%	3.62%
Nifty 500	22,370.65	0.37%	0.18%	4.13%
Nifty Large Midcap 250	15,645.10	0.14%	-0.05%	4.69%
Nifty Midcap 150	20,734.55	-0.24%	-0.36%	6.04%
Nifty Next 50	71,360.85	-0.39%	-1.36%	3.37%
Nifty Smallcap 250	17,059.70	0.07%	0.30%	7.53%

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

Smart Beta Index

Index	25-Jun-24	1 Day	1 Week	1 Month
Nifty 200 Momentum 30 Index	35,489.65	-0.43%	-2.39%	1.65%
NIFTY 500 Value 50	14,553.79	-0.68%	-1.25%	0.51%
Nifty 200 Quality 30	20,559.60	0.09%	-0.74%	3.80%
Nifty 50 Equal Weight	29,911.80	0.22%	-0.63%	2.75%
NIFTY Alpha Low Volatility 30	27,734.15	0.12%	-1.05%	1.64%
Nifty High Beta 50	4,170.44	-0.56%	-1.00%	2.50%
Nifty Low Volatility 50	23,442.76	0.21%	-0.40%	3.30%
Nifty Midcap150 Momentum 50	63,184.05	-0.30%	-1.11%	3.78%
Nifty PSE	10,570.00	-0.73%	-3.15%	-2.36%
Nifty SME Emerge	14,460.51	1.01%	3.41%	8.79%
Nifty 100 ESG	4,704.80	0.44%	0.30%	4.19%

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

Sector Indices

Index	25-Jun-24	1 Day	1 Week	1 Month
Nifty Auto	25,250.25	-0.24%	-1.81%	5.69%
Nifty Bank	52,606.00	1.74%	4.29%	7.42%
Nifty Consumption	11,087.60	-0.32%	-1.44%	3.22%
Nifty Financial	23,510.65	1.90%	4.10%	7.59%
Nifty FMCG	56,246.35	-0.26%	-1.61%	1.44%
Nifty Healthcare	12,411.65	0.11%	-1.10%	3.06%
Nifty IT	35,426.90	0.81%	1.79%	4.74%
Nifty Media	1,991.50	-0.50%	-2.60%	4.98%
Nifty Metal	9,857.45	-0.70%	-0.33%	-0.71%
Nifty MNC	30,157.45	-0.37%	-1.42%	3.42%
Nifty Pharma	19,532.30	0.06%	-1.48%	2.16%
Nifty Realty	1,115.50	-1.75%	-3.03%	8.97%
Nifty Energy	40,255.20	-0.52%	-2.55%	-3.31%

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

Nifty 50 Top 5 Gainers

Company	25-Jun-24	Prev_Day	% Change	1 Week
Axis Bank	1,271.45	1,228.10	3.53	6.67
ICICI Bank	1,197.95	1,170.10	2.38	6.69
HDFC Bank	1,711.35	1,672.40	2.33	6.44
HDFC Standard Life Insurance	590.95	579.50	1.98	-1.70
Tech Mahindra	1,427.75	1,401.70	1.86	4.11

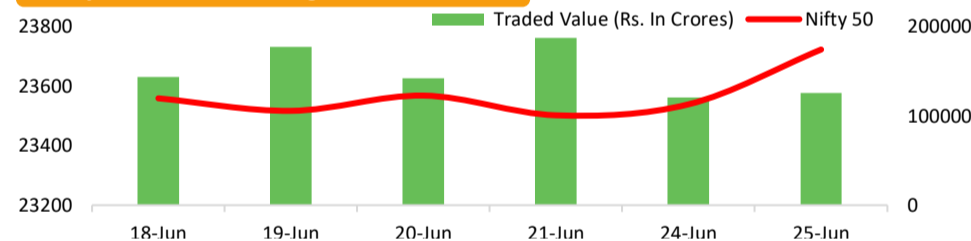
Source: NSE

Nifty 50 Top 5 Losers

Company	25-Jun-24	Prev_Day	% Change	1 Week
BPCL	296.30	305	-2.93	-53.04
Eicher Motors Limited	4,775.05	4871	-1.97	-3.26
Power Grid	327.40	333	-1.67	-1.33
Asian Paints	2,858.45	2896	-1.30	-2.06
Indian Oil	164.37	166	-1.16	-3.08

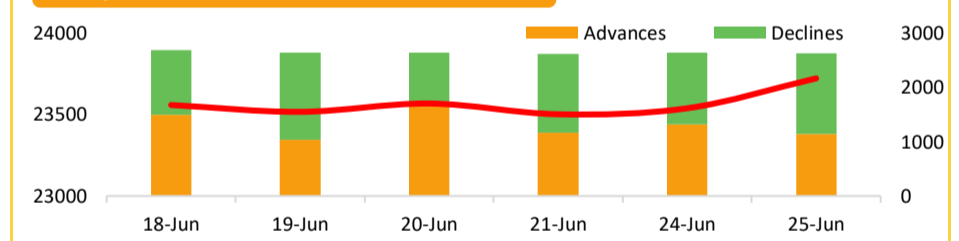
Source: NSE

Nifty 50 vs NSE Trading Volume



Source: NSE

Nifty 50 vs Advances & Declines



Source: NSE

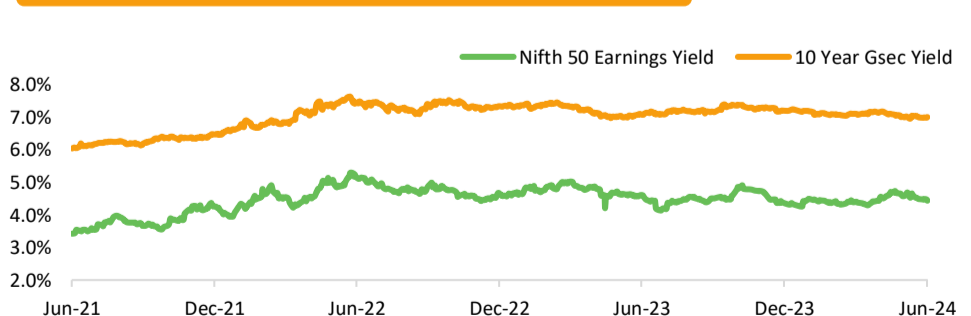
Indian equity markets closed with healthy gains amid positive global cues. The key benchmark indices hit fresh record highs as investors' sentiment was underpinned after the central bank data showed that India's current account balance recorded a surplus of \$5.7 billion or 0.6% of GDP in Q4 FY24, driven by a lower merchandise trade deficit.

Tata Motors announced that it has teamed up with Bajaj Finance Ltd to provide financing options for all its commercial vehicles. The company has signed a memorandum of understanding with Bajaj Finance Ltd, for the same and customers will benefit from the latter's wide reach, competitive interest rates, flexi loan and digitally-enabled loan processing.

JSW Steel USA intends to invest \$110 million in upgrading its steel plate mill in Baytown, Texas by incorporating new machinery and eco-friendly technology. These investments will enable the production of high-quality monopile steel plates to support the US administration's new actions to expand offshore wind energy by deploying 30 gigawatts (GW) of offshore wind by 2030.

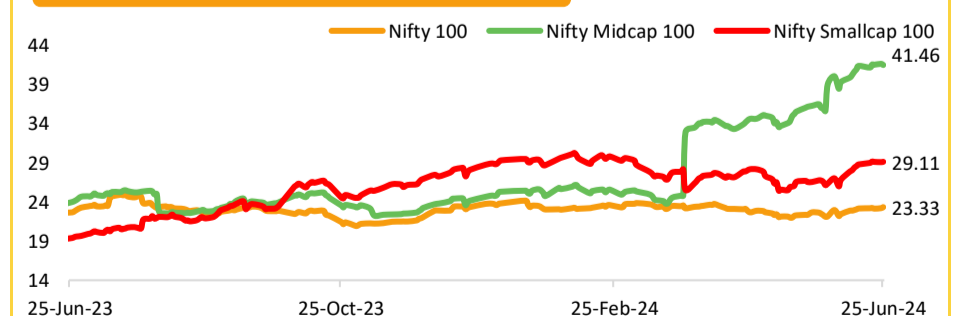
The Adani Group plans to invest Rs 1.3 trillion in FY25 to expand capacity and of that amount Adani Green Energy will spend Rs 34,000 crore for its facilities in Khavda in Gujarat.

Nifty 50 Earnings Yield Vs 10 Year Gsec Yield



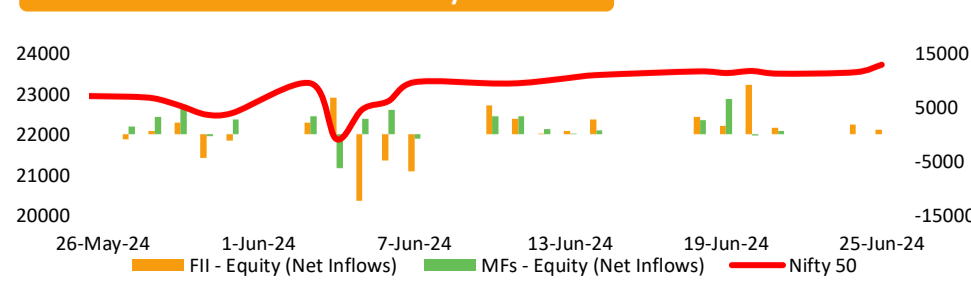
Source: NSE, Refinitiv; Nifty 50 Earnings Yield = 1 / Nifty 50 Trailing PE

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	860.42	14,828	-19,429	-8,536
MF**	646.61	22,017	102,507	184,536
DII	-149.45	20,477	120,396	227,971

Source: SEBI, NSDL; **As on 21st Jun 2024;

F&O Trends

	Latest	Previous	Change %
Near Futures	23731.30	23543.20	0.80%
Near Basis	9.95	5.35	85.98%
Mid Futures	23831.70	23669.80	0.68%
Mid Basis	110.35	131.95	-16.37%
Near Open Interest (Cr.)	0.89	1.02	-12.67%
Mid Open Interest (Cr.)	0.68	0.48	42.98%
Rollover (%)	45.72	34.46	32.66%
Put Call Ratio (OI)	1.38	1.14	21.27%
Put Call Ratio(Vol)	0.97	0.89	8.93%

Source: NSE

FII Derivative Trade Statistics

	Buy	Sell	Open Int.
Index Futures	11278	9502	35328
Index Options	2168679	2183628	451307
Stock Futures	127077	123813	305779
Stock Options	55242	55372	63105
Total	2362276	2372315	855519

Source: NSE

Global Equity Market

Global Indices	25-Jun-24	1 Day	1 Week	1 Month
Russell 1000 Index (U.S.)	2977.50	0.31%	-0.26%	2.68%
Nasdaq 100 (U.S.)	19701.13	1.16%	-1.04%	4.75%
FTSE (U.K.)	8247.79	-0.41%	0.69%	-0.84%
DAX Index (Germany)	18177.62	-0.81%	0.25%	-2.76%
CAC 40 Index (France)	7662.30	-0.58%	0.44%	-5.34%
SSE Composite (China)	2950.00	-0.44%	-2.65%	-4.50%
Nikkei (Japan)	39173.15	0.95%	1.80%	1.36%
Kospi (South Korea)	2774.39	0.35%	0.38%	3.23%
HangSeng (Hong Kong)	18072.90	0.25%	0.88%	-2.88%
Strait Times (Singapore)	3326.28	0.37%	0.74%	0.29%
Ibovespa Sao Paulo (Brazil)	122331.39	-0.25%	2.26%	-1.59%
RTS Index (Russia)	NA	NA	NA	NA
S&P/ASX 200 (Australia)	7838.80	1.36%	0.78%	1.44%
Jakarta Composite (Indonesia)	6882.70	-0.09%	2.20%	-4.70%
KLSE (Malaysia)	1585.38	-0.27%	-1.29%	-2.10%

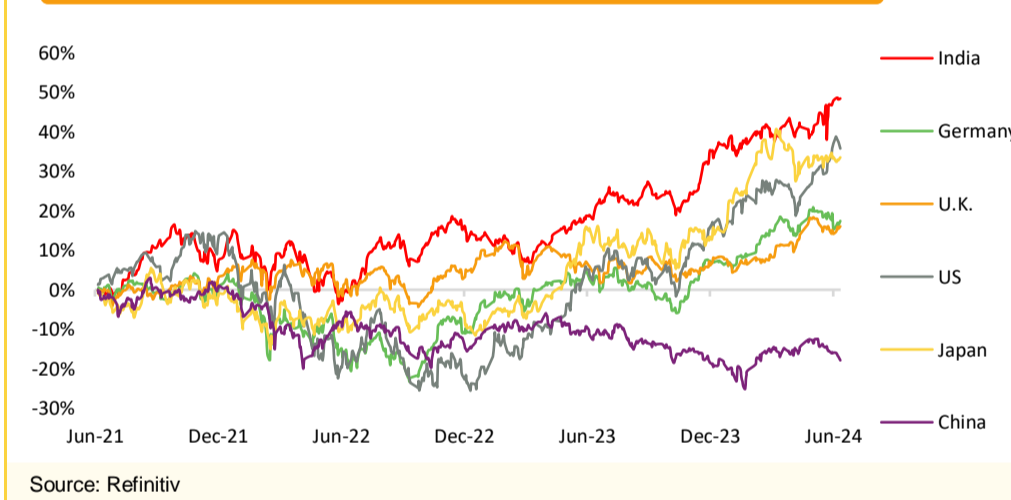
Source: Refinitiv; Positive returns indicates green colour, unchanged is yellow and negative returns is rose.

Global & Domestic Commodity Market

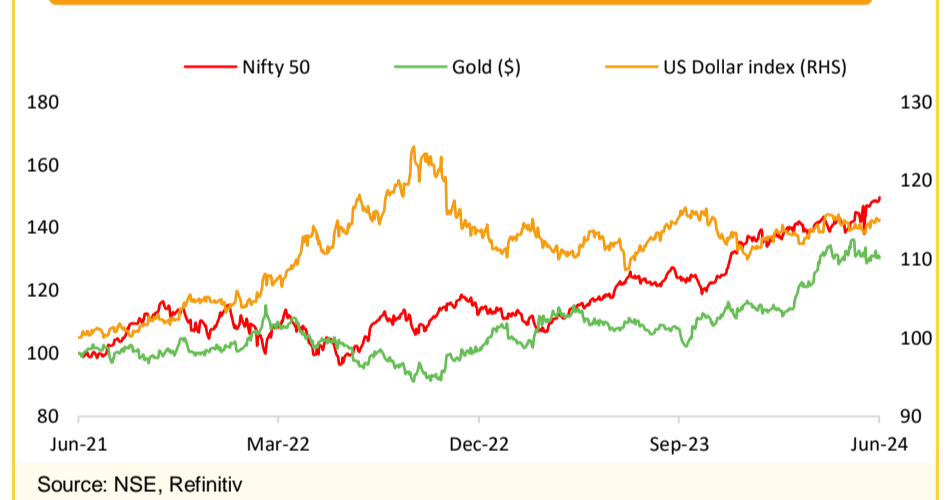
Commodity Prices	25-Jun-24	1 Day	1 Week	1 Month
Gold (INR/10 gm)	71,580	0.18%	0.78%	-0.24%
Gold (\$/oz)	2,319.01	-0.60%	-0.40%	-0.63%
Silver (INR/1 kg)	88,438	-0.17%	1.18%	-1.40%
Silver (\$/oz)	28.91	-2.43%	-2.05%	-4.69%
Brent Crude(\$/bbl)	88.30	0.07%	2.81%	10.29%
Crude Oil (INR/1 bbl)	6,817.00	1.02%	1.58%	6.55%
NYMEX Crude(\$/bbl)	81.87	-0.80%	-0.85%	4.59%
Natural Gas (INR/1 mmbtu)	234.80	3.85%	0.82%	6.20%
Aluminium (INR/1 kg)	232.35	0.58%	0.19%	-3.73%
Copper (INR/1 kg)	849.70	0.02%	0.85%	-4.64%
Nickel (INR/1 kg)	1,463.00	0.72%	-0.23%	-14.44%
Lead (INR/1 kg)	194.50	0.41%	0.26%	0.31%
Zinc (INR/1 kg)	266.25	0.70%	2.27%	-2.83%
Mentha Oil (INR/1 kg)	938.10	-0.19%	-2.36%	-7.65%
Baltic Dry Index ^[1]	1,973	-1.20%	0.61%	9.79%

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



Micro and Macroeconomic Data

Definition: Economic data can be broadly classified under two categories, namely microeconomic and macroeconomic. Microeconomic data can be defined as those statistical numbers that deal with particular markets and segments within the economy. Macroeconomic data are those that depict the current status of an economy as a whole.



Explanation

Microeconomic data is generated or collected at various micro levels of an economy. Microeconomic data helps analyze various critical aspects such as consumer behaviour, individual labour markets etc. Macroeconomic data, on the other hand, deals with the study of an economy as a whole. Consolidation of microeconomic data results in macroeconomic data. Macroeconomic data takes into consideration aggregate variables such as national demand, national output and inflation. Consumer Price Index will be an example of macroeconomic data. The two main categories under Consumer Price Index are Food and Fuel. Again under Food Category, there are various micro levels such as vegetables, fruits, sugar etc.

Mutual Fund Category Performance - Equity & Hybrid

Category	1 Month	6 Month	1 Year	3 Year
Large Cap Fund	3.76	16.78	36.14	16.61
Mid Cap Fund	6.71	25.98	55.57	25.28
Large & Mid Cap Fund	5.38	22.06	46.36	21.47
Small Cap Fund	7.31	20.84	51.07	27.04
Multi Cap Fund	5.58	21.47	48.73	23.00
Focused Fund	5.01	18.82	40.10	18.45
Value Fund	4.58	21.42	50.09	22.77
Contra Fund	4.77	22.94	51.13	24.98
ELSS	5.30	19.11	42.05	20.92
Equity Savings	1.93	7.80	16.42	9.45
Arbitrage Fund	0.73	4.04	7.51	5.46
Dividend Yield Fund	4.09	20.92	49.45	23.43
Aggressive Hybrid Fund	3.75	15.60	32.37	15.81
Balanced Advantage	2.46	11.55	25.42	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.

^[1]Data as on 24 Jun, 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.