



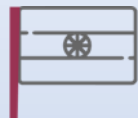
Monthly Market Review

Nov 2024



INDIAN EQUITY MARKET DASHBOARD

Nov 2024



DOMESTIC

Index Name (Broader Market Indices)	Absolute (%)				CAGR(%)		
	1 Month	3 Months	6 Months	1 Year	3 Years	5 Years	10 Years
BSE Sensex	-5.70	-2.57	7.68	25.86	11.59	15.99	12.43
Nifty 50	-6.12	-2.67	8.10	28.39	12.35	16.61	12.62
Nifty 100	-6.72	-3.43	7.81	33.07	13.13	17.04	13.08
Nifty 500	-6.35	-3.33	8.82	36.33	15.71	19.75	14.24
Nifty Midcap 150	-6.42	-4.38	10.86	44.15	23.21	28.45	19.39
Nifty Smallcap 250	-3.58	-0.89	12.58	48.57	24.61	31.04	16.94
Nifty Microcap 250	-3.33	0.31	18.91	54.36	35.99	42.62	23.19
Sectoral Indices							
Nifty PSU Bank	-0.46	-9.08	-10.94	37.28	35.10	22.80	6.81
Nifty Healthcare	-2.20	5.10	20.94	56.80	19.55	25.70	10.49
Nifty Pharma	-2.34	4.59	20.36	55.88	18.74	24.50	8.34
Nifty Bank	-2.84	0.07	5.14	21.21	10.48	11.99	12.37
Nifty IT	-3.12	-0.51	23.73	34.87	7.59	23.35	15.77
Nifty Infrastructure	-7.81	-6.83	3.42	45.98	21.71	23.09	11.97
Nifty Metal	-8.55	-2.38	2.07	45.31	20.46	32.05	14.62
Nifty Realty	-9.05	-8.55	2.95	66.22	26.40	30.43	17.96
Nifty FMCG	-9.65	-4.54	10.30	17.72	17.67	14.78	13.53
Nifty Energy	-10.63	-10.34	-2.05	48.91	21.12	21.42	17.29
Nifty Oil & Gas	-12.95	-14.10	-3.69	50.24	15.32	17.97	15.38
Nifty Auto	-12.99	-11.65	5.31	48.82	28.71	23.97	12.14

- Domestic equity markets fell amid a broad-based sell-off across the sectors as fears of a full-fledged war between Iran and Israel dented investors' appetite for riskier assets on expectations of a significant retaliatory attack by Israel following Iran's missile strikes. Losses were extended as sentiment was dented following muted earnings reported by major domestic companies for the second quarter of FY25 so far

INDIAN MUTUAL FUND DASHBOARD

Equity Mutual Funds

Monthly Market Review



CATEGORY PERFORMANCE

Category	Absolute Returns (%)			CAGR (%)			
	1 month	3 months	6 months	1 year	3 years	5 years	10 years
Large Cap	-6.04	-3.02	8.08	33.43	13.04	16.47	12.45
Large & Mid Cap	-5.59	-2.11	11.38	41.28	17.50	21.28	15.25
Flexi Cap	-5.37	-1.95	10.52	37.59	15.58	19.09	14.30
Multi Cap	-5.15	-1.38	11.73	41.38	19.21	22.85	15.91
Mid Cap	-5.61	-2.45	13.97	46.05	21.11	26.08	17.51
Small Cap	-3.22	0.63	15.45	43.63	23.15	31.16	19.04
Focused	-5.61	-1.58	10.34	37.29	14.81	18.26	14.07
Value	-5.29	-2.86	10.54	42.78	19.72	22.71	15.71
Index:							
Nifty 100	-6.72	-3.43	7.81	32.97	13.13	17.04	13.08
Nifty 500	-6.35	-3.33	8.82	36.22	15.71	19.75	14.24
Nifty Midcap 150	-6.42	-4.38	10.86	44.01	23.21	28.45	19.39
Nifty Smallcap 250	-3.58	-0.89	12.58	48.41	24.61	31.04	16.94

- In the last one-month, Small Cap category followed by Multi Cap & Value categories delivered the least negative returns.
- It is to be worth noted that all the equity categories witnessed positive returns for 6 months and above periods.

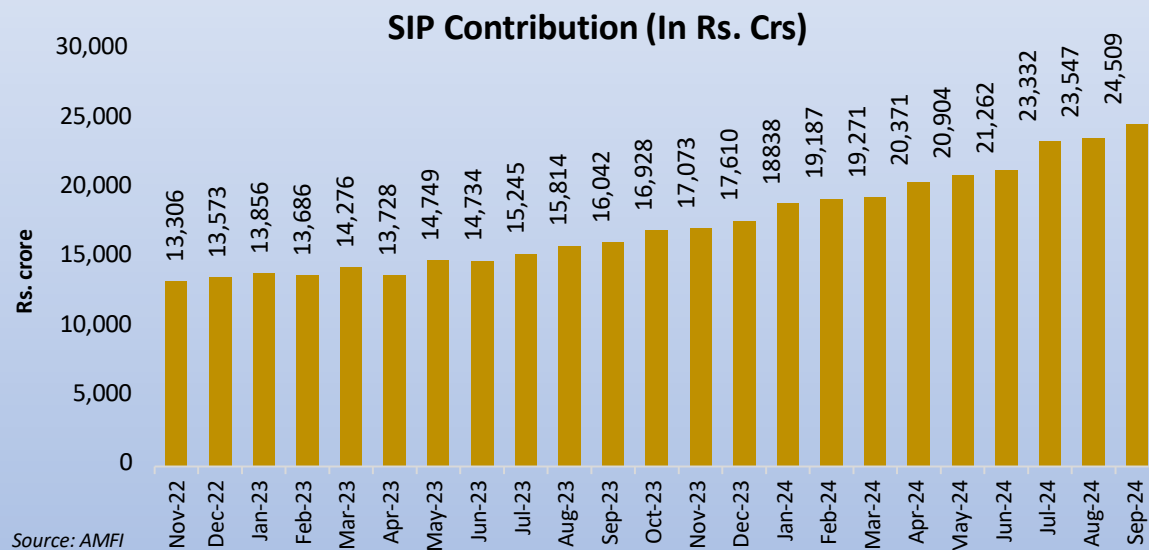


SIP MUTUAL FUNDS

SIP Flows and SIP Returns Data



DOMESTIC



- According to AMFI, SIP contribution in Sep 2024 touched a new high and stood at Rs. 24,509 crore. SIP AUM increased to Rs. 13.82 lakh crore with 987.44 lakh outstanding SIP accounts.

Equity Broad MF category	Category average SIP returns (%)		
	3-year	5-year	10-year
Large cap	19.6	19.4	14.8
Large & Mid cap	25.4	24.8	17.8
Flexi cap	23.1	22.1	16.8
Multi cap	27.2	26.8	19.2
Mid cap	29.9	29.1	20.2
Small cap	31.3	33.6	22.2
Focused	22.3	21.1	16.3
Value	27.6	27.0	18.8

- Small cap category remained top performer in 3-, 5- & 10- year periods. Large cap category has been the bottom performer across periods.



MUTUAL FUND DASHBOARD

Category Performance



CATEGORY PERFORMANCE

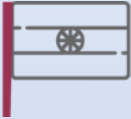
Equity Category:	1 Yr	3 Yr	5 Yr	10 Yr
Large Cap	33.43	13.04	16.47	12.45
Large & Mid Cap	41.28	17.50	21.28	15.25
Multi Cap	41.38	19.21	22.85	15.91
Flexi Cap	37.59	15.58	19.09	14.30
Mid Cap	46.05	21.11	26.08	17.51
Small Cap	43.63	23.15	31.16	19.04
Focused	37.29	14.81	18.26	14.07
Value	42.78	19.72	22.71	15.71
Hybrid Category:				
Conservative Hybrid	14.02	8.20	8.79	7.89
Balanced Hybrid	23.70	--	--	--
Balanced Advantage	23.55	11.46	12.60	9.96
Multi Asset Allocation	27.02	14.47	17.76	12.38
Aggressive Hybrid	30.28	13.39	16.41	11.97

Debt Category	3 Mths	6 Mths	1 Yr	3 Yr
Money Market:				
Overnight	1.59	3.23	6.62	5.75
Liquid	1.74	3.53	7.27	6.11
Ultra Short Duration	1.73	3.48	7.06	5.81
Low Duration	1.84	3.72	7.40	5.89
Money Market	1.78	3.61	7.36	6.11
Accrual:				
Short Duration	1.96	4.21	7.94	5.91
Medium Duration	2.19	4.64	8.58	6.06
Banking & PSU Debt	2.04	4.32	8.08	5.75
Corporate Bond	2.12	4.45	8.24	5.74
Floating Rate	2.08	4.39	8.31	6.23
Credit Risk	2.24	4.41	8.23	8.96
Duration:				
Medium to Long Duration	2.09	5.06	9.28	5.54
Long Duration	2.52	6.68	12.47	6.40
Dynamic Bond	2.23	5.29	9.52	5.86
Gilt	2.24	5.56	10.18	5.85
Gilt Fund with 10 year constant duration	2.19	5.55	10.30	5.55



MARKET ROUNDUP

Key Takeaways & Outlook



Domestic & Global factors that played out for the Indian markets:

- Domestic equity markets fell amid a broad-based sell-off across the sectors as fears of a full-fledged war between Iran and Israel dented investors' appetite for riskier assets.
- Losses were extended as sentiment were dented following muted earnings reported by major domestic companies for the second quarter of FY25 so far.
- Markets fell further due to persistent selling by foreign portfolio investors (FPIs) in domestic markets and subsequent transfer of funds to China following Beijing's announcement of various stimulus plans to accelerate economic expansion.
- Losses were restricted after the RBI, kept the repo rate unchanged at 6.50% and however, shifted its stance from 'withdrawal of accommodation' to 'neutral', paving the way for potential rate cuts in the future. A notable drop in global crude oil prices on international markets towards end of the month has positively influenced market sentiment.

Outlook:

- Going forward, domestic corporates may see growth plateau, a revival of demand is necessary for additional earnings growth given the indications of a slowdown in consumption.
- From a global perspective, investors will be keeping a close eye on the policy decisions by the new elect President of the United States after the Republican Party secured a victory. Additionally, the latest developments in the Middle East regarding geopolitical tensions between Israel and Iran will be closely monitored for further guidance. There is a possibility of some outflows by FPIs from domestic equity markets to emerging market like China, domestic flows are expected to counterbalance to FPI outflows.
- **Looking at the current volatility, investors may look at Large cap oriented funds along with Multi Asset, Balanced Advantage and Balanced Hybrid categories as these categories shall assist to manage the near-term risks.**



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