

## Market Snapshot

KEY INDICES	04-Oct-24	27-Sep-24	%Ch
S&P CNX NIFTY	25014.60	26178.95	<b>-4.45</b>
SENSEX	81688.45	85571.85	<b>-4.54</b>
NIFTY MIDCAP 100	58474.45	60381.15	<b>-3.16</b>
NIFTY SMLCAP 100	18758.65	19242.00	<b>-2.51</b>

(Source: Capitaline, [Investing.com](https://www.investing.com))

## Sectoral Snapshot

KEY INDICES	04-Oct-24	27-Sep-24	%Ch
NIFTY BANK	51462.05	53834.30	<b>-4.41</b>
NIFTY AUTO	25926.30	27610.75	<b>-6.10</b>
NIFTY FMCG	63380.05	65845.45	<b>-3.74</b>
NIFTY IT	41912.50	42312.60	<b>-0.95</b>
NIFTY METAL	10113.20	10064.60	<b>0.48</b>
NIFTY PHARMA	23094.70	23519.10	<b>-1.80</b>
NIFTY REALTY	1031.80	1117.80	<b>-7.69</b>
BSE CG	70301.10	73704.11	<b>-4.62</b>
BSE CD	65858.28	67944.53	<b>-3.07</b>
BSE Oil & GAS	30509.05	31896.80	<b>-4.35</b>
BSE POWER	8355.27	8698.82	<b>-3.95</b>

(Source: [Investing.com](https://www.investing.com))

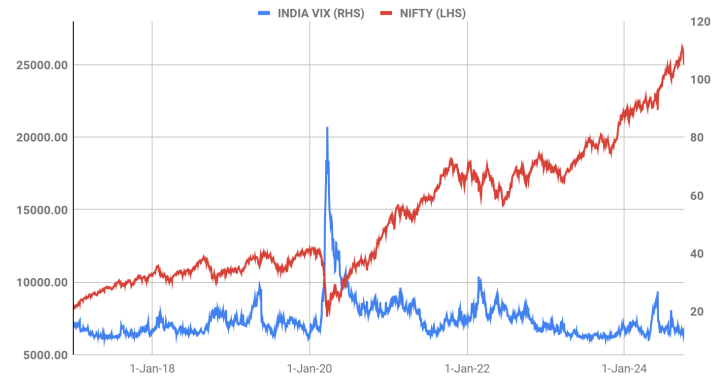
## FII & DII Activities (Rs Crore)

27/09/2024 to 04/10/2024

Activities	FIIs	DIIIs
Buy	112334.38	127939.39
Sell	130574.81	87978.35
Net	<b>-18240.43</b>	<b>39961.04</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX



(Source: [NSE](https://www.nse.com))

## Benchmarks drop sharply amid global cues; Nifty ends below 25,050

The key equity indices ended the truncated week with significant losses amid heightened tensions in the Middle East, triggered by the Israel-Iran conflict. The indices witnessed selling pressure during the period under review. The Sensex settled at 81,688.45 mark while Nifty ended below 25,050 mark.

In the week ended on Friday, 4 October 2024, the S&P BSE Sensex tumbled 3,883.40 points or 4.54% to settle at 81,688.45. The Nifty 50 index declined 1,164.35 points or 4.45% to settle at 25,014.60. The BSE Mid-Cap index fell 3.20% to close at 49,490.32. The BSE Small-Cap index declined 2.01% to end at 57,091.36.

SEBI introduced a six-step plan to curtail retail participation in speculative index derivatives. This could result in a significant decline in trading volumes. New regulations require traders to maintain higher margins, potentially hindering their ability to take on larger leveraged positions.

## Sensex Gainers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
<b>Infosys</b>	1918.35	1907.20	<b>0.58</b>
<b>Tech Mahindra</b>	1616.50	1609.85	<b>0.41</b>
<b>Tata Steel</b>	166.75	166.50	<b>0.15</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
<b>RELIANCE</b>	2773.80	3052.40	<b>-9.13</b>
<b>AXISBANK</b>	1177.50	1272.15	<b>-7.44</b>
<b>ASIANPAINT</b>	3071.85	3310.05	<b>-7.20</b>
<b>BAJFINANCE</b>	7209.65	7756.20	<b>-7.05</b>
<b>MARUTI</b>	12602.90	13497.35	<b>-6.63</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
<b>JSWSTEEL</b>	1033.75	1001.55	<b>3.22</b>
<b>INFY</b>	1918.15	1906.75	<b>0.60</b>
<b>TECHM</b>	1616.45	1609.25	<b>0.45</b>
<b>TATASTEEL</b>	166.75	166.55	<b>0.12</b>
<b>HINDALCO</b>	747.90	747.15	<b>0.10</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
<b>RELIANCE</b>	2773.05	3052.35	<b>-9.15</b>
<b>AXISBANK</b>	1178.40	1273.15	<b>-7.44</b>
<b>BPCL</b>	340.25	367.30	<b>-7.36</b>
<b>HEROMOTOCO</b>	5520.85	5957.35	<b>-7.33</b>
<b>ASIANPAINT</b>	3072.50	3310.75	<b>-7.20</b>

(Source: Capitaline)

Moreover, the reduction of weekly options expiries to one per exchange could lead to decreased revenues for exchanges and brokers. This change means that each exchange will only offer weekly contracts for one benchmark index instead of the current two to four. These measures are designed to reduce excessive speculation in the futures and options (F&O) segment, where retail investors often find themselves on the losing end of trades.

India's fiscal deficit remained under control during April-August, reaching 27% of the full-year target. This containment was attributed to muted spending in the early months of the fiscal year. In comparison, the deficit stood at a higher 36% during the same period in FY24.

The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) fell from 57.5 in August to 56.5 in September, highlighting a robust improvement in the health of the sector that was nonetheless the weakest since January.

The HSBC India Services PMI survey, compiled by S&P Global, indicates strong sector performance, but total new business, international sales, and output have all increased at the slowest rates since late 2023.

Despite solid job creation and strengthening business confidence, the Services Business Activity Index fell from 60.9 in August to 57.7 in September, still indicating growth above the neutral mark of 50.0.

### Global market:

China's central bank announced plans to reduce mortgage rates for existing home loans by the end of October, likely by an average of 50 basis points.

The ADP National Employment Report indicated that US private payrolls grew more than expected in September, adding 143,000 jobs. The US job market's resilience was further underscored by the unexpected increase in job

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
WHIRLPOOL	2362.60	2201.45	7.32
LALPATHLAB	3495.30	3271.85	6.83
TATACHEM	1128.65	1067.20	5.76
PETRONET	357.85	339.35	5.45
POLICYBZR	1713.55	1640.80	4.43

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	04-Oct-24	27-Sep-24	%Ch
M&MFIN	300.45	333.50	-9.91
GODREJPROP	2897.45	3191.40	-9.21
TVSMOTOR	2687.50	2949.70	-8.89
DEVYANI	178.45	195.60	-8.77
JUBLFOOD	629.15	688.25	-8.59

(Source: Capitaline)

## World Markets

KEY INDICES	04-Oct-24	27-Sep-24	%Ch
DJIA	42352.75	42313.00	0.09
NASDAQ	18137.85	18119.59	0.10
BOVESPA	131792.00	132730.36	-0.71
FTSE 100	8280.63	8320.76	-0.48
CAC 40	7541.36	7791.79	-3.21
DAX	19120.93	19473.63	-1.81
MOEX RUSSIA	2804.62	2858.56	-1.89
NIKKEI 225	38635.62	39829.56	-3.00
HANG SENG	22736.87	20632.30	10.20
STRAITS TIMES	3589.13	3573.36	0.44
SHANGHAI COMPOSITE	CLOSED	3087.53	-
JAKARTA	7496.09	7696.92	-2.61

(Source: Capitaline, [Investing.com](https://www.investing.com))

openings in August. The Job Openings and Labor Turnover Survey (JOLTS) revealed a rebound of 329,000 job openings, exceeding analysts' expectations. While hiring declined slightly, layoffs decreased.

(Source: Capitaline)

## Outlook and Technical View

Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 24825, 24637, 24307, 24202 while levels of 25343, 25673, 25861, 25998 may act as resistance with pivot point at 25155.

(Source: Capitaline)

## Derivative Weekly Wrap

### OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
<b>NIFTY</b>	31-Oct-24	25193.00	26345.60	<b>-4.37%</b>	<b>178.40</b>	551730	651375	<b>-15.30%</b>
<b>BANKNIFTY</b>	30-Oct-24	51920.00	54204.10	<b>-4.21%</b>	<b>457.95</b>	173552	121999	<b>42.26%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>TATACHEM</b>	1128.65	1138.00	31-Oct-24	<b>11.20%</b>
<b>LICHSGFIN</b>	634.85	639.85	31-Oct-24	<b>10.65%</b>
<b>MFSL</b>	1160.80	1169.75	31-Oct-24	<b>10.42%</b>
<b>INDUSINDBK</b>	1382.85	1393.45	31-Oct-24	<b>10.36%</b>
<b>TITAN</b>	3670.10	3698.05	31-Oct-24	<b>10.30%</b>
<b>AXISBANK</b>	1178.40	1187.10	31-Oct-24	<b>9.98%</b>
<b>INDIGO</b>	4609.35	4643.25	31-Oct-24	<b>9.94%</b>
<b>RELIANCE</b>	2773.05	2793.40	31-Oct-24	<b>9.92%</b>
<b>TATACONSUM</b>	1130.40	1138.65	31-Oct-24	<b>9.87%</b>
<b>GMRINFRA</b>	89.94	90.59	31-Oct-24	<b>9.77%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>APOLLOTYRE</b>	511.55	503.90	31-Oct-24	<b>-20.22%</b>
<b>M&amp;MFIN</b>	300.45	297.45	31-Oct-24	<b>-13.50%</b>
<b>IDFCFIRSTB</b>	71.83	71.12	31-Oct-24	<b>-13.36%</b>
<b>SUNTV</b>	811.85	807.65	31-Oct-24	<b>-6.99%</b>
<b>INFY</b>	1918.15	1909.15	31-Oct-24	<b>-6.34%</b>
<b>TECHM</b>	1616.45	1612.50	31-Oct-24	<b>-3.30%</b>
<b>JUBLFOOD</b>	629.15	627.80	31-Oct-24	<b>-2.90%</b>
<b>BOSCHLTD</b>	36734.50	36664.85	31-Oct-24	<b>-2.56%</b>
<b>HINDUNILVR</b>	2848.75	2845.70	31-Oct-24	<b>-1.45%</b>
<b>VEDL</b>	508.70	508.30	31-Oct-24	<b>-1.06%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	43185075	39412050	<b>1.10</b>

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

<b>1. HINDCOPPER</b>	<b>2. SAIL</b>	<b>3. HDFCBANK</b>	<b>4. INFY</b>	<b>5. TCS</b>
<b>6. IRCTC</b>	<b>7. MARUTI</b>	<b>8. LT</b>	<b>9. JSWSTEEL</b>	<b>10. ONGC</b>
<b>11. RELIANCE</b>	<b>12. IOC</b>	<b>13. BPCL</b>	<b>14. HINDPETRO</b>	

(Source: [Moneycontrol](#))

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