

Market Snapshot

KEY INDICES	08-Nov-24	01-Nov-24	%Ch
S&P CNX NIFTY	24148.20	24304.35	-0.64
SENSEX	79486.32	79724.12	-0.30
NIFTY MIDCAP 100	56352.00	56496.05	-0.25
NIFTY SMLCAP 100	18445.60	18794.90	-1.86

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

Sectoral Snapshot

KEY INDICES	08-Nov-24	01-Nov-24	%Ch
NIFTY BANK	51561.20	51673.90	-0.22
NIFTY AUTO	23805.20	23805.60	0.00
NIFTY FMCG	58359.40	59433.20	-1.81
NIFTY IT	42050.15	40433.65	4.00
NIFTY METAL	9308.90	9390.30	-0.87
NIFTY PHARMA	22542.25	22807.15	-1.16
NIFTY REALTY	967.65	1009.10	-4.11
BSE CG	69479.43	69577.84	-0.14
BSE CD	61648.78	61150.63	0.81
BSE Oil & GAS	27324.24	27707.56	-1.38
BSE POWER	7703.27	7896.49	-2.45

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

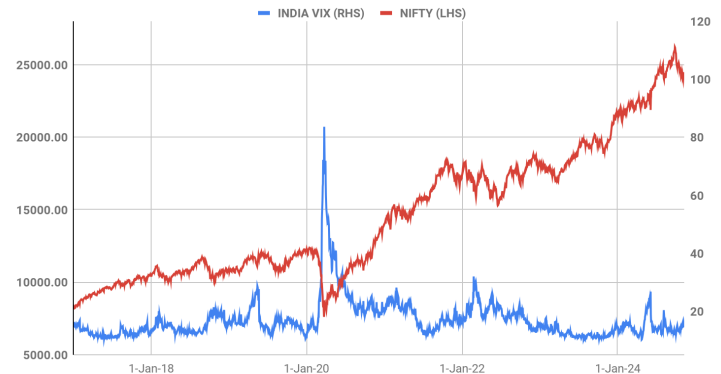
FII & DII Activities (Rs Crore)

01/11/2024 to 08/11/2024

Activities	FIIs	DIIIs
Buy	91176.11	76799.86
Sell	113367.42	59271.09
Net	-22191.31	17528.77

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Indices end with minor cuts; Nifty closes below 24,150

The key equity benchmarks concluded the week with minor losses, despite of a positive global sentiment triggered by a quarter point rate cut by the US Fed. The equity market edged lower in three out of five trading sessions in this week. The Nifty closed below the 24,150 mark.

In the week ended on Friday, 25 October 2024, the S&P BSE Sensex declined 237.8 points or 0.30% to settle at 79,486.32. The Nifty 50 index shed 156.15 points or 0.64% to settle at 24,148.20. The BSE Mid-Cap index slipped 0.44% to close at 46,080.07. The BSE Small-Cap index decreased 1.27% to end at 54,913.85.

The HSBC final Manufacturing Purchasing Managers' Index rose to 57.5 in October from an eight-month low of 56.5 in

Sensex Gainers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
M&M	2979.25	2817.00	5.76
TECHM	1682.50	1603.90	4.90
HCLTECH	1837.55	1758.20	4.51
TCS	4145.00	3985.40	4.00
INFY	1831.05	1761.60	3.94

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
ASIANPAINT	2769.25	2940.00	-5.81
TATAMOTORS	805.70	843.60	-4.49
RELIANCE	1284.00	1339.10	-4.11
NTPC	397.70	411.50	-3.35
TITAN	3186.35	3293.55	-3.25

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
M&M	2974.90	2817.65	5.58
TECHM	1681.35	1603.65	4.85
HCLTECH	1837.50	1757.40	4.56
TCS	4147.00	3984.20	4.09
INFY	1829.95	1760.85	3.92

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
COALINDIA	424.05	454.15	-6.63
HINDALCO	650.45	690.90	-5.85
ASIANPAINT	2769.45	2939.85	-5.80
GRASIM	2544.85	2698.90	-5.71
HEROMOTOCO	4768.90	5020.50	-5.01

(Source: Capitaline)

September. The flash reading was 57.4. A score above 50.0 indicates expansion.

RBI has released monthly data on India's International Trade in Services for the Month of September 2024 on Thursday. The value of exports and imports of services during September 2024 stood at \$32,579 million, up 14.6% on year and \$16,507 million, up 13.2%, respectively.

India's services activity growth recovered from September's ten-month low on sharper expansion in output and new business, final data from S&P Global showed on Wednesday. The HSBC final services Purchasing Managers' Index registered 58.5 in October, up from 57.7 in September. The flash score was 57.9.

The HSBC composite output index rose to 59.1 from September's ten-month low of 58.3. The final score was above the initial estimate of 58.6.

Global Markets:

The US economy added only 12,000 jobs in October, far below the expected 106,000 and a sharp decline from the revised 223,000 in September. However, these figures were impacted by recent hurricanes and ongoing labor actions. The softer-than-expected payrolls data has intensified expectations of further interest rate cuts by the Federal Reserve.

Trump's victory, coupled with a Republican majority in Congress, suggests fewer obstacles for the 47th President in enacting significant policy reforms. He is expected to pursue a looser fiscal policy, while his protectionist trade and immigration stances are anticipated to strengthen the dollar.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
PAYTM	848.55	761.85	11.38
DIXON	15621.10	14129.75	10.55
GLAND	1777.60	1646.35	7.97
OIL	508.55	473.00	7.52
VOLTAS	1766.00	1642.85	7.50

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	08-Nov-24	01-Nov-24	%Ch
TUBEINVEST	3890.55	4473.90	-13.04
TRENT	6298.95	7149.00	-11.89
HINDZINC	506.25	558.25	-9.31
TORNTPOWER	1694.10	1825.45	-7.20
GODREJPROP	2685.20	2882.70	-6.85

(Source: Capitaline)

World Markets

KEY INDICES	08-Nov-24	01-Nov-24	%Ch
DJIA	43988.99	42052.19	4.61
NASDAQ	19286.78	18239.92	5.74
BOVESPA	127829.80	128120.75	-0.23
FTSE 100	8072.39	8177.15	-1.28
CAC 40	7338.67	7409.11	-0.95
DAX	19215.48	19254.97	-0.21
MOEX RUSSIA	2734.56	2574.71	6.21
NIKKEI 225	39500.37	38053.67	3.80
HANG SENG	20728.19	20506.43	1.08
STRAITS TIMES	3724.37	3555.43	4.75
SHANGHAI COMPOSITE	3452.30	3272.01	5.51
JAKARTA	7287.19	7505.26	-2.91

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

The US Federal Reserve reduced interest rate by 25 basis points to a range of 4.5% to 4.75% on Thursday.

In Europe, the Bank of England cut interest rates on Thursday for only the second time since 2020 and said future reductions were likely to be gradual, seeing higher inflation and growth after the new government's first budget. The Monetary Policy Committee voted 8-1 to cut interest rates to 4.75% from 5%.

(Source: Capitaline)

Outlook and Technical View

Q2FY25 results of companies likely to add volatility to stock specific price movement. 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 24052, 23955, 23843, 23752 while levels of 24261, 24374, 24471, 24542 may act as resistance with pivot point at 24164.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Nov-24	24196.40	24383.05	-0.77%	48.20	452121	424233	6.57%
BANKNIFTY	27-Nov-24	51759.00	51920.00	-0.31%	197.80	176946	176629	0.18%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
AUOPHARMA	1327.55	1335.00	28-Nov-24	10.24%
BRITANNIA	5747.15	5776.90	28-Nov-24	9.45%
EXIDEIND	437.05	439.15	28-Nov-24	8.77%
ICICIBANK	1258.85	1264.75	28-Nov-24	8.55%
GRASIM	2544.85	2556.70	28-Nov-24	8.50%
PETRONET	328.90	330.40	28-Nov-24	8.32%
GODREJCP	1251.05	1256.70	28-Nov-24	8.24%
KOTAKBANK	1745.80	1753.65	28-Nov-24	8.21%
BHARTIARTL	1569.90	1576.90	28-Nov-24	8.14%
PNB	104.79	105.25	28-Nov-24	8.01%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
SUNTV	755.20	739.05	28-Nov-24	-39.03%
APOLLOTYRE	491.05	481.30	28-Nov-24	-36.24%
POWERGRID	316.25	312.35	28-Nov-24	-22.51%
IGL	442.35	437.45	28-Nov-24	-20.22%
M&MFIN	276.15	273.60	28-Nov-24	-16.85%
VOLTAS	1766.00	1752.95	28-Nov-24	-13.49%
ONGC	262.55	260.80	28-Nov-24	-12.16%
ASHOKLEY	221.89	220.82	28-Nov-24	-8.80%
UBL	1925.50	1918.75	28-Nov-24	-6.40%
MANAPPURAM	150.37	149.89	28-Nov-24	-5.83%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	40603275	34051800	1.19

(Source: Capitaline)

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

1. COFORGE	2. PERSISTENT	3. TECHM	4. HCLTECH	5. TCS
6. INFY	7. LTIM	8. WIPRO	9. LTTS	10. BRIGADE
11. GODREJPROP	12. PHOENIXLTD	13. DLF	14. RAYMOND	

(Source: [Moneycontrol](#))

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