

Market Snapshot

KEY INDICES	18-Oct-24	11-Oct-24	%Ch
S&P CNX NIFTY	24854.05	24964.25	-0.44
SENSEX	81224.75	81381.36	-0.19
NIFTY MIDCAP 100	58649.15	59212.70	-0.95
NIFTY SMLCAP 100	19077.80	19008.80	0.36

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

Sectoral Snapshot

KEY INDICES	18-Oct-24	11-Oct-24	%Ch
NIFTY BANK	52094.20	51172.30	1.80
NIFTY AUTO	25146.90	26436.60	-4.88
NIFTY FMCG	61042.10	62080.20	-1.67
NIFTY IT	42106.50	42335.70	-0.54
NIFTY METAL	9753.90	9932.70	-1.80
NIFTY PHARMA	23356.20	23582.25	-0.96
NIFTY REALTY	1047.30	1040.60	0.64
BSE CG	71821.01	71579.87	0.34
BSE CD	64821.02	65606.03	-1.20
BSE OIL & GAS	29686.85	30158.46	-1.56
BSE POWER	8317.10	8419.75	-1.22

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

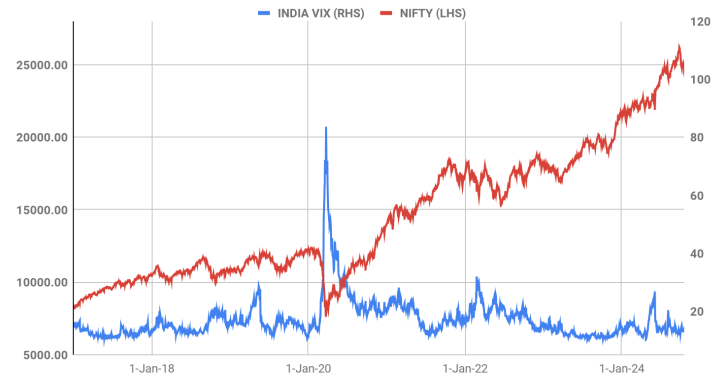
FII & DII Activities (Rs Crore)

11/10/2024 to 18/10/2024

Activities	FIIs	DIIs
Buy	69729.46	80833.08
Sell	93456.81	60718.21
Net	-23727.35	20114.87

(Source: Capitaline)

Nifty Vs. INDIA VIX



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

Barometers tumble for 3rd week, Nifty ends below 24,900 level

The benchmarks witnessed substantial losses during the week, extending their losing streak for the third consecutive week. The indices were lower for three out of five trading sessions. The BSE Mid-Cap index and BSE Small-Cap index fell. Sensex breached the 81,250 mark and Nifty settled below the 24,900 level.

In the week ended on Friday, 18 October 2024, the S&P BSE Sensex tumbled 156.61 points or 0.19% to settle at 81,224.75. The Nifty 50 index declined 110.20 points or 0.44% to settle at 24,854.05. The BSE Mid-Cap index fell 0.18% to close at 56,600.05. The BSE Small-Cap index declined 1.01% to end at 47,946.53.

India's wholesale price index (WPI)-based inflation rose to 1.84% in September as food items, especially vegetables, turned costlier, as per the government data released on Monday. The inflation was 1.31% in August. It was (-)0.07% in September last year.

Sensex Gainers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
WIPRO	548.70	528.95	3.73
ICICIBANK	1263.20	1222.85	3.30
LT	3576.25	3482.95	2.68
TECHM	1688.00	1645.75	2.57
SBIN	819.95	800.00	2.49

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
NESTLEIND	2349.55	2512.40	-6.48
BAJFINANCE	6897.25	7299.80	-5.51
M&M	2963.75	3134.80	-5.46
MARUTI	12102.65	12774.40	-5.26
TATASTEEL	155.30	160.70	-3.36

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
WIPRO	548.65	528.30	3.85
ICICIBANK	1264.50	1223.00	3.39
LT	3577.80	3482.55	2.74
SBIN	820.40	799.75	2.58
HDFCLIFE	742.45	723.85	2.57

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
BAJAJ-AUTO	10063.95	11876.95	-15.26
NESTLEIND	2350.25	2511.80	-6.43
BAJFINANCE	6899.55	7302.00	-5.51
M&M	2964.25	3134.35	-5.43
MARUTI	12105.10	12776.65	-5.26

(Source: Capitaline)

India's trade deficit or the gap between imports and exports was \$20.78 billion during the month of September. The trade deficit narrowed from \$29.7 billion a month back, according to data released on October 16, as merchandise export growth turned positive for the first time in three months. India's merchandise exports in September slightly rose to \$34.58 billion against \$34.41 billion a year ago. Imports increased by 1.6% to \$55.36 billion in September compared to \$54.49 billion in the year-ago period.

Global market:

China's consumer price index (CPI) rose 0.4% from a year earlier last month, against a 0.6% rise in August. CPI was unchanged month-on-month, versus a 0.4% gain in August and below an estimated 0.4% increase. Meanwhile, the producer price index (PPI) fell 2.8% year-on-year in September, versus a 1.8% decline the previous month.

Inflation in the U.K. dropped sharply to 1.7% in September, the Office for National Statistics said on Wednesday.

Chinese GDP grew 4.6% year-on-year in the three months to September 30, but slowing from the 4.7% seen in the prior quarter. GDP grew 0.9% quarter-on-quarter, slightly missing expectations of 1%. This brought year-to-date GDP growth to 4.8%, still below Beijing's 5% annual target.

Separate data on Friday showed China's industrial production and retail sales both grew more than expected in September, while the country's unemployment rate fell to 5.1% against expectations it would remain at 5.3%. Meanwhile, China's house prices fell 5.8% year-over-year in September, a larger drop than 5.3% in August.

Japan's Core CPI, which excludes volatile fresh food items, grew 2.4% year-on-year in September, government data showed on Friday. The reading eased from the 2.8% - a 10-month high - seen in the prior month. A core reading that excludes both fresh food and energy prices, and is watched

Nifty Midcap 100 Gainers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
HINDPETRO	431.60	395.50	9.13
MPHASIS	3095.75	2876.35	7.63
TUBEINVEST	4488.75	4225.65	6.23
TORNTPOWER	1973.65	1886.40	4.63
VOLTAS	1865.30	1789.45	4.24

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	18-Oct-24	11-Oct-24	%Ch
IGL	451.70	540.55	-16.44
OIL	533.40	584.55	-8.75
BANDHANBNK	191.96	210.26	-8.70
TATACHEM	1088.10	1183.10	-8.03
NHPC	84.13	90.92	-7.47

(Source: Capitaline)

World Markets

KEY INDICES	18-Oct-24	11-Oct-24	%Ch
DJIA	43275.91	42863.86	0.96
NASDAQ	18489.55	18342.94	0.80
BOVESPA	130499.26	129992.29	0.39
FTSE 100	8358.25	8253.65	1.27
CAC 40	7613.05	7577.89	0.46
DAX	19657.37	19373.83	1.46
MOEX RUSSIA	2751.90	2754.52	-0.10
NIKKEI 225	38981.75	39605.80	-1.58
HANG SENG	20804.11	CLOSED	-
STRAITS TIMES	3640.19	3573.76	1.86
SHANGHAI COMPOSITE	3261.56	3217.74	1.36
JAKARTA	7760.06	7520.60	3.18

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

closely by the Bank of Japan as a gauge of underlying inflation, rose to 2.1% in September from 2% in the prior month. Headline CPI inflation fell to 2.5% from 3% in the prior month.

(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 24652, 24450, 24333, 24252 while levels of 24970, 25088, 25289, 25352 may act as resistance with pivot point at 24769.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	31-Oct-24	24965.55	25048.00	-0.33%	111.50	530099	552666	-4.08%
BANKNIFTY	30-Oct-24	52361.40	51391.05	1.89%	267.20	170841	208600	-18.10%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
BANDHANBNK	191.96	193.15	31-Oct-24	17.41%
ITC	486.70	489.40	31-Oct-24	15.58%
WIPRO	548.65	551.50	31-Oct-24	14.58%
LUPIN	2179.70	2190.65	31-Oct-24	14.10%
IGL	451.70	453.95	31-Oct-24	13.99%
CHOLAFIN	1460.30	1467.55	31-Oct-24	13.94%
APOLLOHOSP	6982.90	7016.90	31-Oct-24	13.67%
BIOCON	339.95	341.60	31-Oct-24	13.63%
MARICO	669.30	672.50	31-Oct-24	13.42%
PFC	472.70	474.95	31-Oct-24	13.36%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
INFY	1879.60	1863.35	31-Oct-24	-24.27%
JUBLFOOD	625.00	621.30	31-Oct-24	-16.62%
BATAINDIA	1464.95	1457.40	31-Oct-24	-14.47%
IDFCFIRSTB	71.57	71.27	31-Oct-24	-11.77%
SHREECEM	24325.25	24231.05	31-Oct-24	-10.87%
HCLTECH	1857.70	1853.50	31-Oct-24	-6.35%
TECHM	1687.90	1685.20	31-Oct-24	-4.49%
BALKRISIND	2998.65	2998.05	31-Oct-24	-0.56%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	49086000	52291825	0.94

(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. BAJAJ-AUTO	2. FEDERALBNK	3. ICICIBANK	4. SBIN	5. BANKBARODA
6. AXISBANK	7. HDFCBANK	8. EXIDEIND	9. M&M	10. MARUTI
11. HEROMOTOCO	12. TATAMOTORS			

(Source: [Moneycontrol](#))

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