

## Market Snapshot

KEY INDICES	25-Oct-24	18-Oct-24	%Ch
S&P CNX NIFTY	24180.80	24854.05	<b>-2.71</b>
SENSEX	79402.29	81224.75	<b>-2.24</b>
NIFTY MIDCAP 100	55277.95	58649.15	<b>-5.75</b>
NIFTY SMLCAP 100	17847.90	19077.80	<b>-6.45</b>

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

## Sectoral Snapshot

KEY INDICES	25-Oct-24	18-Oct-24	%Ch
NIFTY BANK	50787.45	52094.20	<b>-2.51</b>
NIFTY AUTO	23799.30	25146.90	<b>-5.36</b>
NIFTY FMCG	58908.50	61042.10	<b>-3.50</b>
NIFTY IT	42038.85	42106.50	<b>-0.16</b>
NIFTY METAL	9048.95	9753.90	<b>-7.23</b>
NIFTY PHARMA	22574.55	23356.20	<b>-3.35</b>
NIFTY REALTY	974.35	1047.30	<b>-6.97</b>
BSE CG	66429.40	71821.01	<b>-7.51</b>
BSE CD	61183.17	64821.02	<b>-5.61</b>
BSE Oil & GAS	27506.56	29686.85	<b>-7.34</b>
BSE POWER	7741.92	8317.10	<b>-6.92</b>

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

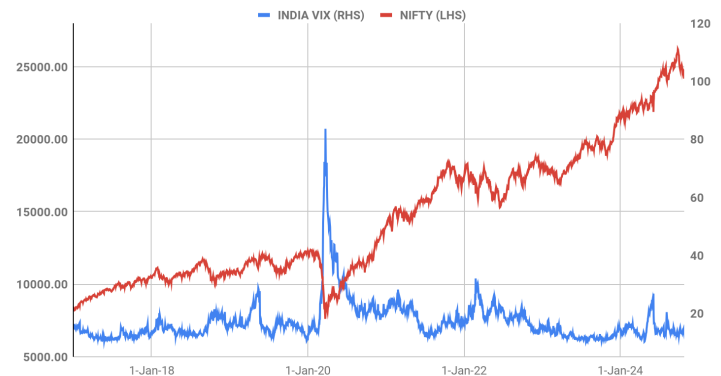
## FII & DII Activities (Rs Crore)

18/10/2024 to 25/10/2024

Activities	FIIs	DIIIs
Buy	69729.46	80833.08
Sell	93456.81	60718.21
Net	<b>-23727.35</b>	<b>20114.87</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX



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

## Market slides for 4th week in a row

The equity barometers witnessed major losses during the week, extending their sliding streak for the fourth straight week. The indices were lower for all five trading sessions. The broader market underperformed the frontline indices. The Nifty closed below the 24,200 level.

In the week ended on Friday, 25 October 2024, the S&P BSE Sensex tumbled 1,822.46 points or 2.24% to settle at 79,402.29. The Nifty 50 index declined 673.25 points or 2.71% to settle at 24,180.80. The BSE Mid-Cap index dropped 5.2% to close at 45,452.83. The BSE Small-Cap index slumped 7.37% to end at 52,335.66.

The HSBC Flash India Composite Output Index, which gauges the overall health of the Indian economy, rose slightly to 58.6 in October from 58.3 in September. The HSBC

## Sensex Gainers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
<b>HDFCBANK</b>	1742.60	1681.15	<b>3.66</b>
<b>TECHM</b>	1716.40	1688.00	<b>1.68</b>
<b>BAJFINANCE</b>	6907.60	6897.25	<b>0.15</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
<b>INDUSINDBK</b>	1041.55	1346.55	<b>-22.65</b>
<b>M&amp;M</b>	2716.95	2963.75	<b>-8.33</b>
<b>LT</b>	3327.80	3576.25	<b>-6.95</b>
<b>HINDUNILVR</b>	2527.55	2715.65	<b>-6.93</b>
<b>BAJAJFINSV</b>	1707.10	1819.75	<b>-6.19</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
<b>HDFCBANK</b>	1743.40	1681.85	<b>3.66</b>
<b>SHREECEM</b>	24956.80	24325.25	<b>2.60</b>
<b>TECHM</b>	1716.45	1687.90	<b>1.69</b>
<b>BAJAJ-AUTO</b>	10206.10	10063.95	<b>1.41</b>
<b>BAJFINANCE</b>	6910.15	6899.55	<b>0.15</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
<b>INDUSINDBK</b>	1041.60	1347.25	<b>-22.69</b>
<b>IOC</b>	146.31	165.35	<b>-11.51</b>
<b>BPCL</b>	306.30	342.50	<b>-10.57</b>
<b>HINDALCO</b>	678.75	753.50	<b>-9.92</b>
<b>M&amp;M</b>	2720.85	2964.25	<b>-8.21</b>

(Source: Capitaline)

Flash India Services PMI Business Activity Index remained relatively unchanged at 57.9 in October, compared to 57.7 in September.

The HSBC Flash India Manufacturing PMI Output Index increased to 60.1 in October from 59.8 in September. The overall HSBC Flash India Manufacturing PMI rose to 57.4 in October from 56.5 in September.

The International Monetary Fund (IMF) maintained its June growth rate projects for India in its latest World Economic Outlook (WEO). IMF stated that India is set to grow at 7% in the current fiscal year ending March 31, 2025 and 6.5% in the next fiscal year (FY2025-26).

### Global Markets:

German Producer price index fell to 1.4% YoY in September 2024, due to significantly lower energy prices, the federal statistics office said on Monday.

The People's Bank of China lowered both the one-year and five-year LPRs by 25 basis points, signaling a continued effort to stimulate the economy.

South Korea's GDP expanded 0.1% in the third quarter from the previous one, narrowly avoiding a technical recession, following a 0.2% contraction in the second quarter. On a year-on-year basis, South Korea's economy grew 1.5%.

Japanese business activity shrank in October. The au jibun bank flash manufacturing PMI fell to 49.0 in October from 49.7 in September. A reading below 50 indicates contraction, with the sector shrinking for a third consecutive month. The au jibun bank flash services PMI slid to 49.3 in October from

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
SONACOMS	699.25	637.30	9.72
COFORGE	7739.85	7210.40	7.34
MFSL	1274.85	1196.65	6.53
TUBEINVEST	4627.75	4488.75	3.10
PERSISTENT	5670.90	5506.15	2.99

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	25-Oct-24	18-Oct-24	%Ch
POONAWALLA	297.05	376.00	-21.00
L&TFINANCE	140.28	166.64	-15.82
IDEA	7.66	9.02	-15.08
BHEL	216.85	253.85	-14.58
HINDPETRO	372.40	431.60	-13.72

(Source: Capitaline)

## World Markets

KEY INDICES	25-Oct-24	18-Oct-24	%Ch
DJIA	42114.40	43275.91	-2.68
NASDAQ	18518.61	18489.55	0.16
BOVESPA	129893.32	130499.26	-0.46
FTSE 100	8248.84	8358.25	-1.31
CAC 40	7497.54	7613.05	-1.52
DAX	19463.59	19657.37	-0.99
MOEX RUSSIA	2660.36	2751.90	-3.33
NIKKEI 225	37913.92	38981.75	-2.74
HANG SENG	20590.15	20804.11	-1.03
STRAITS TIMES	3593.41	3640.19	-1.29
SHANGHAI COMPOSITE	3299.70	3261.56	1.17
JAKARTA	7694.66	7760.06	-0.84

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

53.1 in the prior month, falling into contraction for the first time since June. The fall in services activity saw the composite PMI for October drop to 49.4 from 52.0 in the prior month.

The October headline Tokyo Consumer Price Index (CPI) rose 1.8% year-over-year (YoY), compared to 2.2% in the previous month, according to the Statistics Bureau of Japan.

(Source: Capitaline)

## Outlook and Technical View

F&O December month expiry to remain focus. 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 24024, 23866, 23658, 23502 while levels of 24390, 24598, 24756, 24892 may act as resistance with pivot point at 24232.

(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	24215.00	24965.55	-3.01%	34.20	479628	530099	-9.52%
BANKNIFTY	31-Oct-24	50895.50	52361.40	-2.80%	108.05	136545	170841	-20.07%

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
BHEL	216.85	217.60	31-Oct-24	21.04%
RECLTD	508.00	509.75	31-Oct-24	20.96%
JUBLFOOD	585.25	587.25	31-Oct-24	20.79%
VOLTAS	1754.85	1760.20	31-Oct-24	18.55%
NAUKRI	7597.65	7620.60	31-Oct-24	18.38%
TATACHEM	1064.75	1067.95	31-Oct-24	18.28%
FEDERALBNK	186.24	186.77	31-Oct-24	17.31%
LICHSGFIN	598.25	599.95	31-Oct-24	17.29%
PFC	438.10	439.30	31-Oct-24	16.66%
BHARATFORG	1400.20	1403.95	31-Oct-24	16.29%

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
IDFCFIRSTB	65.50	63.57	31-Oct-24	-179.25%
MGL	1497.25	1462.40	31-Oct-24	-141.60%
INFY	1862.05	1838.70	31-Oct-24	-76.28%
TECHM	1716.45	1699.60	31-Oct-24	-59.72%
NTPC	398.90	396.25	31-Oct-24	-40.41%
BALKRISIND	2907.55	2889.95	31-Oct-24	-36.82%
NMDC	217.83	217.30	31-Oct-24	-14.80%
UBL	1983.60	1979.25	31-Oct-24	-13.34%
HEROMOTOCO	4973.30	4962.75	31-Oct-24	-12.90%
PEL	1051.80	1049.60	31-Oct-24	-12.72%

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
<b>NIFTY</b>	103209575	136979725	<b>0.75</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. NBCC</b>	<b>2. BHEL</b>	<b>3. ABB</b>	<b>4. SIEMENS</b>	<b>5. RVNL</b>
<b>6. PRAJIND</b>	<b>7. MAZDOCK</b>	<b>8. GRINDWELL</b>	<b>9. FINCABLES</b>	<b>10. SCHAEFFLER</b>
<b>11. ELGIEQUIP</b>	<b>12. POLYCAB</b>	<b>13. CGPOWER</b>	<b>14. KPIL</b>	<b>15. BDL</b>
<b>16. HAL</b>	<b>17. LT</b>	<b>18. SUZLON</b>		

(Source: [Moneycontrol](#))

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