

## Market Snapshot

KEY INDICES	29-Nov-24	22-Nov-24	%Ch
S&P CNX NIFTY	24131.10	23907.25	<b>0.94</b>
SENSEX	79802.79	79117.11	<b>0.87</b>
NIFTY MIDCAP 100	56392.65	55016.85	<b>2.50</b>
NIFTY SMLCAP 100	18650.95	17755.55	<b>5.04</b>

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

## Sectoral Snapshot

KEY INDICES	29-Nov-24	22-Nov-24	%Ch
NIFTY BANK	52055.60	51135.40	<b>1.80</b>
NIFTY AUTO	23368.55	23554.10	<b>-0.79</b>
NIFTY FMCG	57943.70	56956.45	<b>1.73</b>
NIFTY IT	43146.25	43332.10	<b>-0.43</b>
NIFTY METAL	9034.00	8846.20	<b>2.12</b>
NIFTY PHARMA	22240.20	21962.05	<b>1.27</b>
NIFTY REALTY	1020.15	1006.25	<b>1.38</b>
BSE CG	70700.26	67417.28	<b>4.87</b>
BSE CD	62469.19	62030.71	<b>0.71</b>
BSE Oil & GAS	26812.75	25722.53	<b>4.24</b>
BSE POWER	7489.62	7291.82	<b>2.71</b>

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

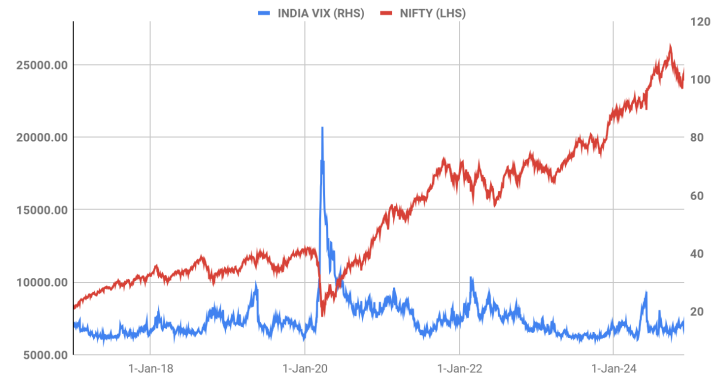
## FII & DII Activities (Rs Crore)

22/11/2024 to 29/11/2024

Activities	FIIs	DIIs
Buy	165731.57	81399.77
Sell	159484.14	72752.84
<b>Net</b>	<b>6247.43</b>	<b>8646.93</b>

(Source: Capitaline)

## Nifty Vs. INDIA VIX



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

## Barometers bounce back with significant gains after a volatile week

The domestic equity benchmarks concluded a volatile week with substantial gains, following the Maharashtra Assembly Elections and allegations on the Adani Group leaders. Indices were higher for three out of five trading sessions. The Nifty closed above the 24,100 level, while the Sensex settled above the 79,800 mark.

In the week ended on Friday, 29 November 2024, the S&P BSE Sensex gained 685.68 points or 0.87% to settle at 79,802.79. The Nifty 50 index added 223.85 points or 0.94% to settle at 24,131.10. The BSE Mid-Cap index surged 2.31% to close at 46,070.85. The BSE Small-Cap index soared 4.91% to end at 55,199.86.

In a statement, Adani Green Energy (AGEL) addressed recent media reports suggesting that Gautam Adani, Sagar Adani, and Vneet Jaain had been charged with FCPA violations. The company categorically denied these claims, stating that the charges outlined in the US Department of Justice (DOJ)

## Sensex Gainers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
<b>BHARTIARTL</b>	1627.45	1570.10	<b>3.65</b>
<b>LT</b>	3725.90	3604.55	<b>3.37</b>
<b>HDFCBANK</b>	1797.65	1745.95	<b>2.96</b>
<b>SBIN</b>	839.00	816.05	<b>2.81</b>
<b>RELIANCE</b>	1292.45	1265.95	<b>2.09</b>

(Source: Capitaline)

## Sensex Losers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
<b>HCLTECH</b>	1848.90	1899.05	<b>-2.64</b>
<b>INFY</b>	1858.45	1902.95	<b>-2.34</b>
<b>POWERGRID</b>	329.60	337.00	<b>-2.20</b>
<b>TECHM</b>	1711.55	1747.70	<b>-2.07</b>
<b>TITAN</b>	3249.45	3309.10	<b>-1.80</b>

(Source: Capitaline)

## Nifty Gainers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
<b>SHREECEM</b>	26076.45	24794.75	<b>5.17</b>
<b>ADANI PORTS</b>	1190.05	1136.75	<b>4.69</b>
<b>IOC</b>	138.63	132.61	<b>4.54</b>
<b>ONGC</b>	256.70	245.60	<b>4.52</b>
<b>BHARTIARTL</b>	1627.15	1569.30	<b>3.69</b>

(Source: Capitaline)

## Nifty Losers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
<b>BAJAJ-AUTO</b>	9033.65	9481.65	<b>-4.72</b>
<b>HDFCLIFE</b>	657.75	688.20	<b>-4.42</b>
<b>SBILIFE</b>	1437.75	1485.15	<b>-3.19</b>
<b>EICHERMOT</b>	4831.85	4986.20	<b>-3.10</b>
<b>HCLTECH</b>	1848.05	1898.40	<b>-2.65</b>

(Source: Capitaline)

indictment and the US Securities and Exchange Commission (SEC) civil complaint do not involve allegations of bribery or corruption against these individuals.

### Global Markets:

China kept its medium-term lending facility rate unchanged at 2.0% on 900 billion yuan (\$124.26 billion) worth of one-year loans to some financial institutions, according to the bank's official statement.

South Korea's central bank lowered interest rates by 25 basis points. The bank cited concerns about slowing economic growth in the coming year.

Tokyo's Core CPI inflation, which excludes volatile fresh food items, rose 2.2% year-on-year in November, government data showed on Friday. Headline CPI inflation surged 2.6% from 1.8% in the prior month. The BOJ is expected to raise interest rates in December after two historic hikes earlier this year.

In Australia, the consumer price index (CPI) inflation grew by 2.1% year-on-year in October, falling short of expectations due to government subsidies that helped reduce energy costs. However, core inflation, represented by the annual trimmed mean inflation, rose to 3.5% in October from 3.2% the previous month, pushing further above the Reserve Bank's target range.

Euro zone inflation rose from 2% in October to 2.3% in November, flash data from statistics agency Eurostat showed on Friday, above the European Central Bank's 2% target.

Separately, France's harmonized inflation rate came in at 1.7% in November, up slightly from 1.6% in October, according to preliminary data from the National Institute of Statistics and Economic Studies (Insee).

In US, the October PCE price index, the Fed's preferred inflation gauge, rose 2.8% year-over-year, remaining above

## Nifty Midcap 100 Gainers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
IDEA	8.36	6.67	<b>25.34</b>
ADANIPOWER	554.80	460.45	<b>20.49</b>
TTML	78.74	66.82	<b>17.84</b>
LAURUSLABS	567.15	512.60	<b>10.64</b>
ZEEL	129.16	117.17	<b>10.23</b>

(Source: Capitaline)

## Nifty Midcap 100 Losers - Weekly

SCRIPS	29-Nov-24	22-Nov-24	%Ch
JSWENERGY	654.65	688.90	<b>-4.97</b>
FORTIS	659.20	685.85	<b>-3.89</b>
OIL	490.60	507.15	<b>-3.26</b>
IPCALAB	1542.55	1591.35	<b>-3.07</b>
DELHIVERY	335.95	345.85	<b>-2.86</b>

(Source: Capitaline)

## World Markets

KEY INDICES	29-Nov-24	22-Nov-24	%Ch
DJIA	44910.65	44296.51	<b>1.39</b>
NASDAQ	19218.17	19003.65	<b>1.13</b>
BOVESPA	125667.83	129125.51	<b>-2.68</b>
FTSE 100	8287.30	8262.08	<b>0.31</b>
CAC 40	7235.11	7255.01	<b>-0.27</b>
DAX	19626.45	19322.59	<b>1.57</b>
MOEX RUSSIA	2578.00	2581.05	<b>-0.12</b>
NIKKEI 225	38208.03	38283.85	<b>-0.20</b>
HANG SENG	19423.61	19229.97	<b>1.01</b>
STRAITS TIMES	3739.29	3746.02	<b>-0.18</b>
SHANGHAI COMPOSITE	3326.46	3267.19	<b>1.81</b>
JAKARTA	7114.27	7195.56	<b>-1.13</b>

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

the Fed's 2% target. Initial jobless claims dropped 2,000 to a seasonally adjusted 213,000 for the week ended November 23, indicating a tight labor market.

Further, the US economy expanded at a 2.8% annual pace in the third quarter, driven by strong consumer spending and export growth.

The S&P Global Manufacturing PMI for November rose slightly to 48.8 from October's 48.5, signaling a slower contraction. Meanwhile, the more critical Services PMI jumped to 57.0 from October's 55.0, reflecting robust activity in the services sector.

(Source: Capitaline)

## Outlook and Technical View

RBI Bi-monthly policy to hog limelight in coming week. 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 23976, 23821, 23715, 23652 while levels of 24237, 24343, 24452, 24582 may act as resistance with pivot point at 24082.

(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>	26-Dec-24	24318.25	24050.00	<b>1.12%</b>	<b>187.15</b>	454670	93885	<b>384.28%</b>
<b>BANKNIFTY</b>	24-Dec-24	52345.00	51460.00	<b>1.72%</b>	<b>289.40</b>	148036	53750	<b>175.42%</b>

(Source: [NSE](#))

### COST OF CARRY

#### Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>PETRONET</b>	333.10	336.25	26-Dec-24	<b>12.78%</b>
<b>GAIL</b>	199.46	201.03	26-Dec-24	<b>10.64%</b>
<b>MGL</b>	1191.75	1201.05	26-Dec-24	<b>10.55%</b>
<b>IGL</b>	327.05	329.50	26-Dec-24	<b>10.13%</b>
<b>TATAMOTORS</b>	786.45	792.25	26-Dec-24	<b>9.97%</b>
<b>PNB</b>	104.90	105.66	26-Dec-24	<b>9.79%</b>
<b>BPCL</b>	292.10	294.20	26-Dec-24	<b>9.72%</b>
<b>IDEA</b>	8.36	8.42	26-Dec-24	<b>9.70%</b>
<b>M&amp;M</b>	2966.10	2987.10	26-Dec-24	<b>9.57%</b>
<b>HINDPETRO</b>	383.10	385.80	26-Dec-24	<b>9.53%</b>

(Source: [NSE](#))

#### Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
<b>APOLLOTYRE</b>	509.65	501.65	26-Dec-24	<b>-21.22%</b>
<b>BATAINDIA</b>	1410.85	1402.20	26-Dec-24	<b>-8.29%</b>
<b>M&amp;MFIN</b>	273.40	271.80	26-Dec-24	<b>-7.91%</b>
<b>UBL</b>	1950.50	1943.65	26-Dec-24	<b>-4.75%</b>
<b>SHREECEM</b>	26076.45	26037.40	26-Dec-24	<b>-2.02%</b>

(Source: [NSE](#))

## PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	54704150	42830625	1.28

(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. BDL	2. MAZDOCK	3. ELGIEQUIP	4. NBCC	5. WELCORP
6. SIEMENS	7. POLYCAB	8. TITAGARH	9. BEL	10. HAL
11. BAJAJ-AUTO	12. EICHERMOT	13. M&M	14. MARUTI	

(Source: [Moneycontrol](#))

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SHRIRAM INSIGHT SHARE BROKERS LTD. CK-5, Sector-II, Saltlake City, Kolkata - 700091 | Tel : 2359 4612, 2359 4614, 2359 4877 | Fax : (033) 2321-8429 | E-mail : [research@shriraminsight.com](mailto:research@shriraminsight.com) | [www.shriraminsight.com](http://www.shriraminsight.com) |