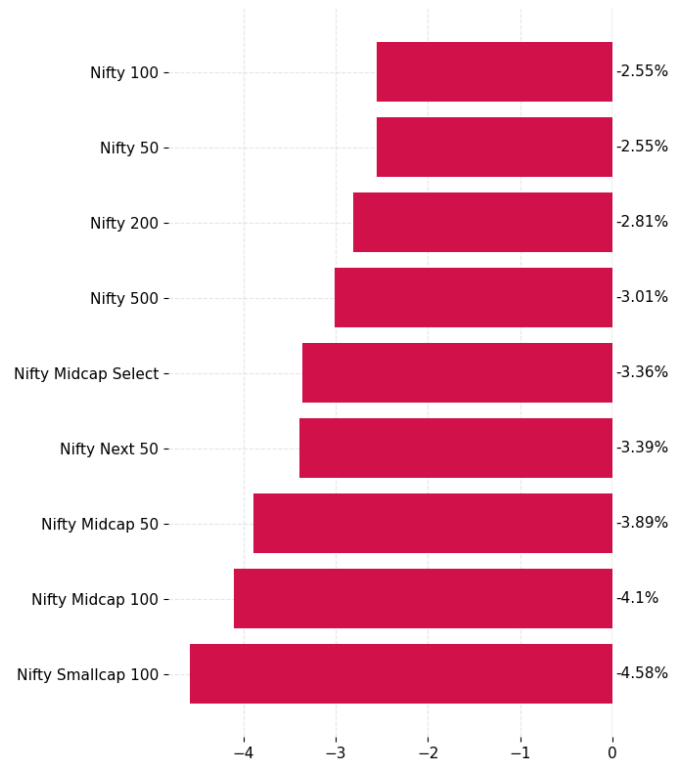


Indices Performance

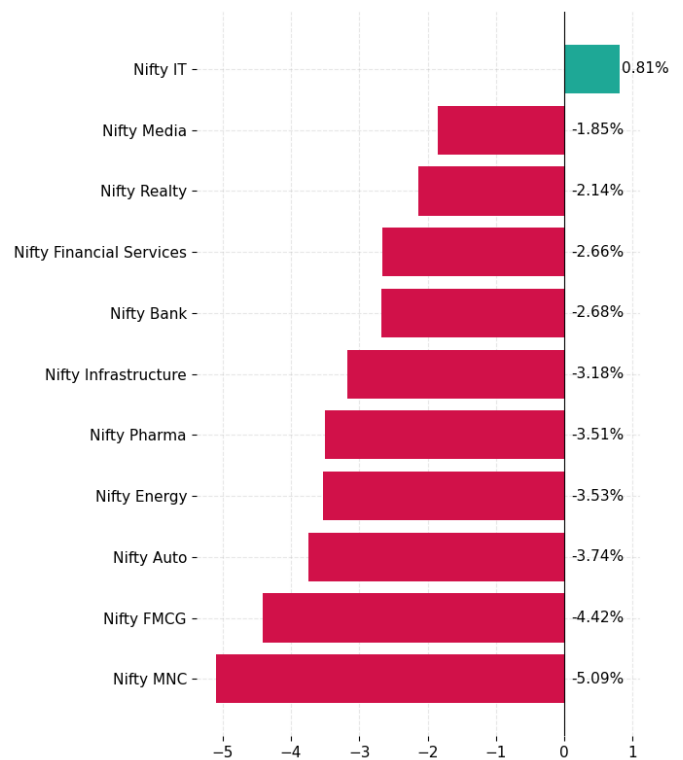
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -2.55% this week. The FMCG, Auto, and Energy sectors were the significant draggers in the index.
- Nifty 100 registered a -2.55% negative return this week. The top contributors to the index were ASIANPAINT, BRITANNIA, and SHRIRAMFIN.
- Nifty Next 50 registered a return of -3.39% this week. ABB, ADANIENSOL, and GODREJCP were the major draggers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -3.36% and -3.89%, respectively. The top contributors to the midcap index were AUROPHARMA, BHARATFORG, and COLPAL.
- The Nifty Smallcap 100 index posted a negative return of -4.58% this week, led by AARTIIND, JYOTHILAB, and IRCON.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 6:44, significantly down from last week's ADR of 20:30.



Source: NSE, INVES 21 Research

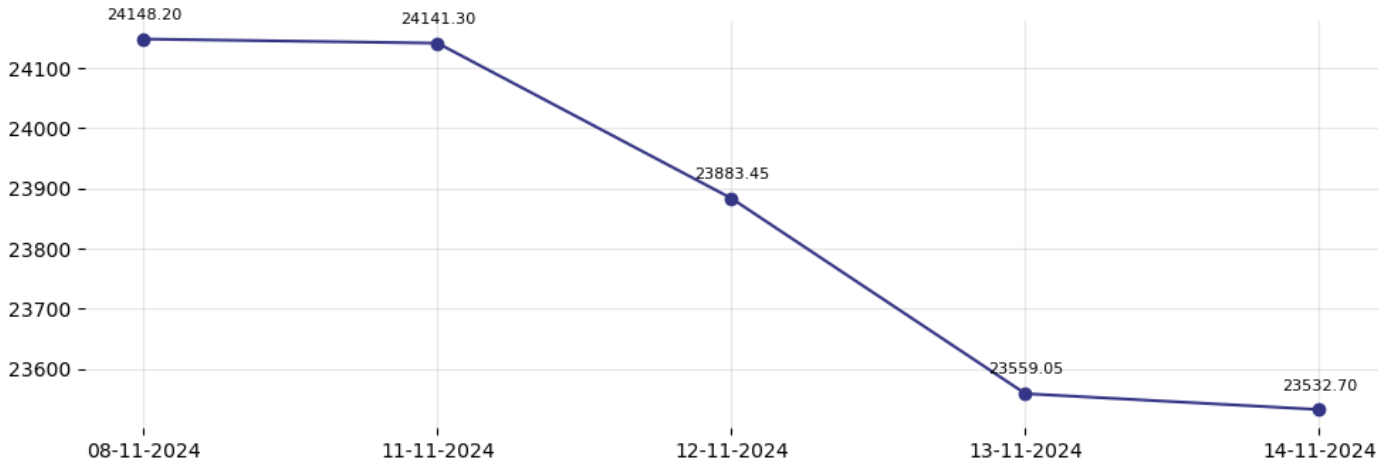
Sectoral Performance

- This week, all the major sectoral indices posted a negative return, except for the Nifty IT.
- Nifty MNC registered the lowest negative return among the major sectoral indices, with a return of -5.09%. SFKINDIA, HINDUNILVR, and TIMKEN led to negative returns in the index.
- Nifty FMCG posted a negative return of -4.42% this week. BRITANNIA, BALRAMCHIN, and COLPAL were significant contributors to the index.
- Nifty Auto registered a negative return of -3.74%, led by the MOTHERSON, EXIDEIND, and BHARATFORG.
- Nifty Bank posted a negative return of -2.68% this week. The top contributors to the index were BANKBARODA, CANBK, and AUBANK.
- Nifty Realty posted a negative return of -2.14% this week. RAYMOND, MAHLIFE, and GODREJPROP were the top draggers in the index.
- Nifty IT posted a positive return this week; the index was up by +0.81%. COFORGE, INFY, and LTIM were the top losers in the index.



Source: NSE, INVES 21 Research

Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an outflow of ₹-9,683.64 crore this week. The week ending Nov 10 saw an outflow of ₹-19,637.60 crore. DII showed net buying of ₹12,508.14 crore this week. DIIs had a net buying of ₹14,391.51 crore last week.

Participant	Amount (Cr.)
FII	-9,683.64
DII	12,508.14

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's retail inflation jumped to 6.21% in October, up from 5.49% in September, marking a 14-month high and breaching the Reserve Bank of India's 6% tolerance limit for the first time since August 2023. The increase was driven mainly by rising food prices, with onion costs playing a major role. In September, inflation had already surpassed the RBI's 4% medium-term target, hitting a 9-month high. Core inflation, which excludes food and fuel, edged up to 3.7% from 3.5% the previous month. The Consumer Food Price Index (CFPI) rose to 10.9% year-on-year, compared to 9.2% in September, with vegetable prices soaring 42.2% year-on-year.

India's Index of Industrial Production (IIP) grew by 3.1% year-on-year in September 2024, rebounding from a 0.1% contraction in August, which was the first decline in nearly two years. This growth surpassed economists' expectations of 2.5%. On a sectoral basis, manufacturing output increased by 3.9%, electricity generation rose by 0.5%, and mining activity recorded a modest gain of 0.2%.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,931.9	23,232.3	23,784.6	24,084.9	24,637.2

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
EICHERMOT	2.06%
INFY	1.89%
HCLTECH	1.17%
LTIM	1.14%
TECHM	0.37%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
BRITANNIA	-14.47%
ASIANPAINT	-10.34%
APOLLOHOSP	-7.56%
ADANI PORTS	-7.16%
TATACONSUM	-6.84%

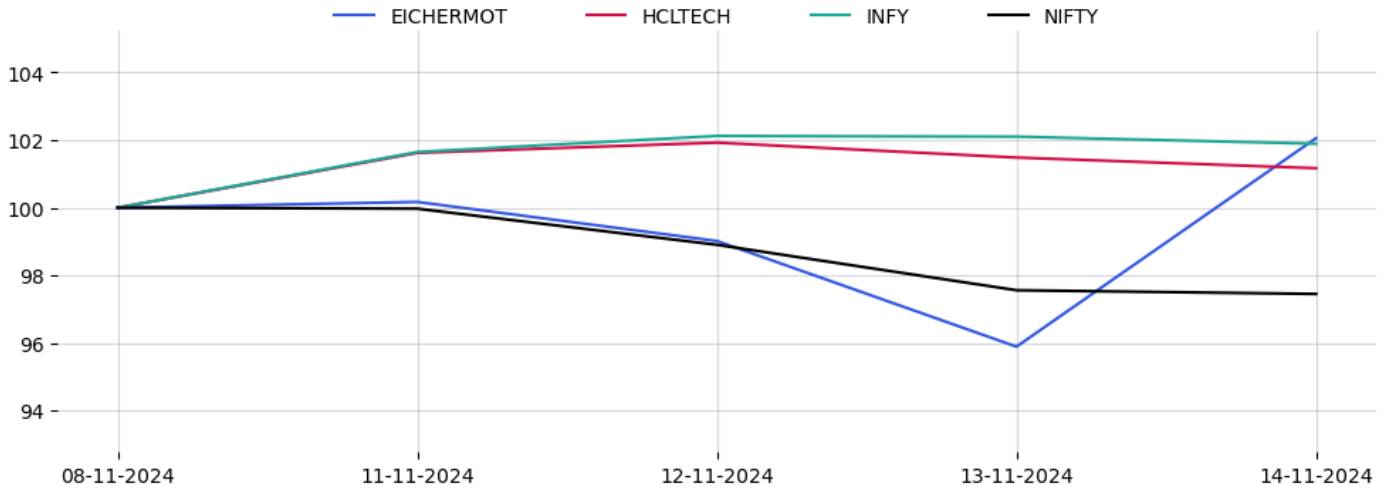
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	46,458,958
TATAMOTORS	17,320,433
POWERGRID	15,213,545

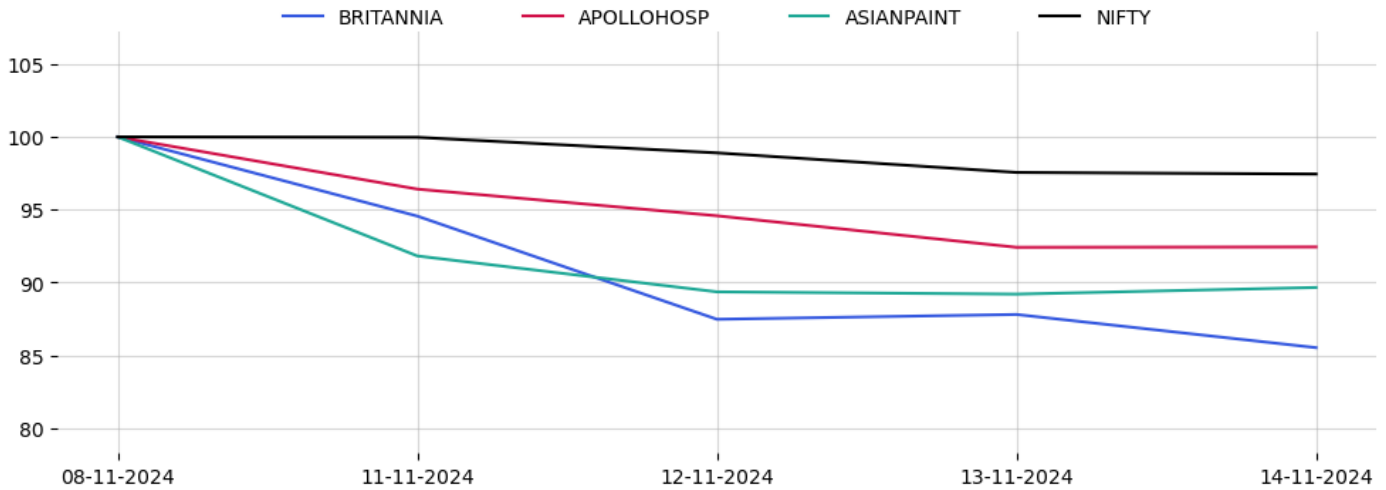
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



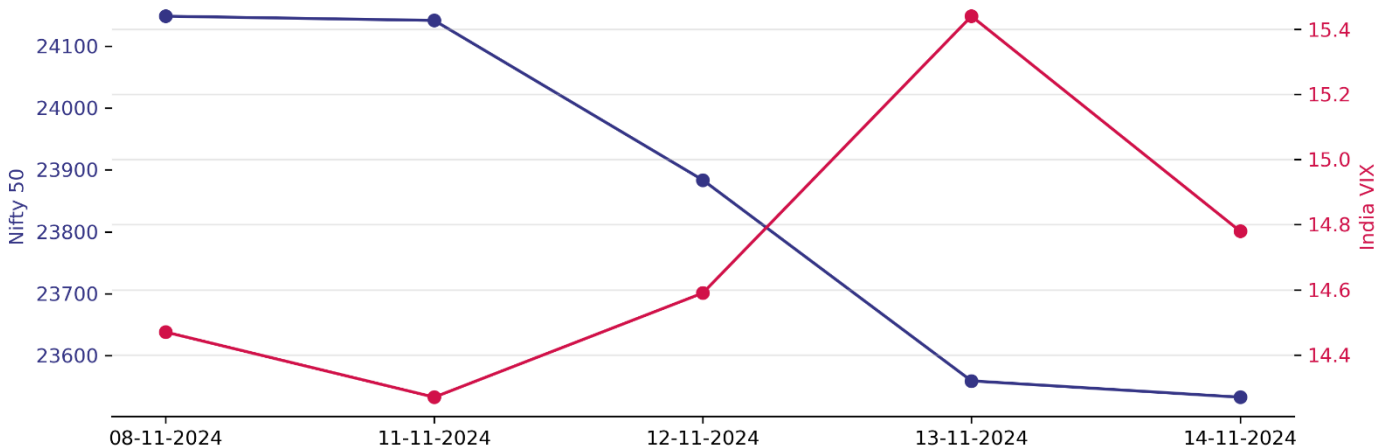
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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