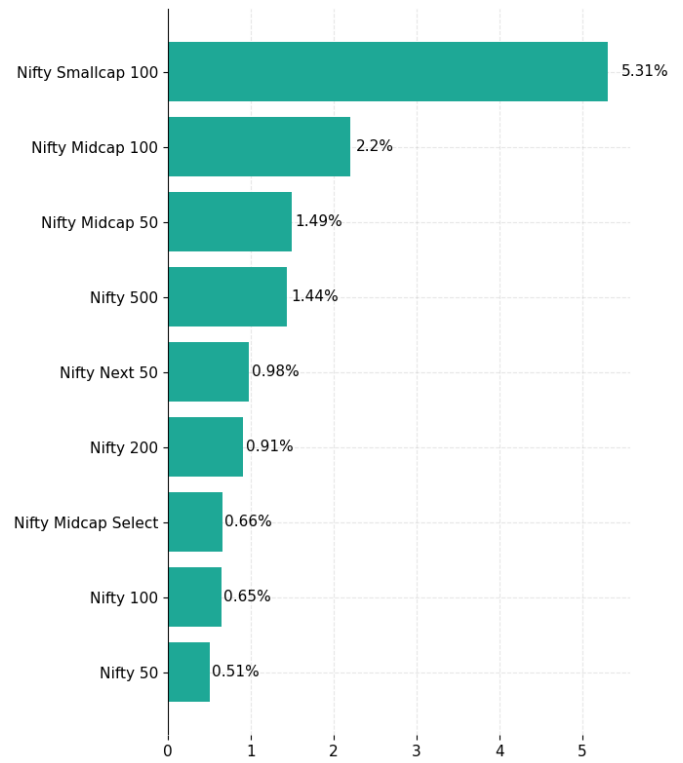


Indices Performance

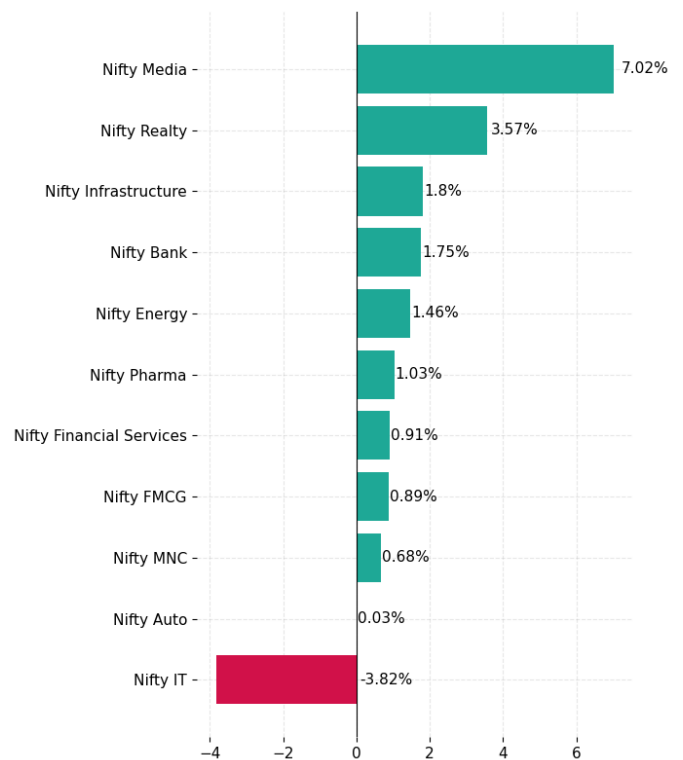
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 0.51% this week. After the fourth consecutive week of negative return, Nifty 50 posted a positive return. The Media, Realty, and Infrastructure sectors led the index.
- Nifty 100 registered a 0.65% positive return this week. The top contributors to the index were M&M, PNB, and ZOMATO.
- Nifty Next 50 registered a positive return of 0.98% this week. ADANIGREEN, NHPC, and DMART were the major contributors to the index.
- Nifty Midcap Select posted a positive return this week, with 0.66%. The top contributors to the midcap index were IDEA, IDFCFIRSTB, and INDHOTEL.
- The Nifty Smallcap 100 index posted the highest positive return of 5.31% this week, led by the BRIGADE, PPLPHARMA, and NCC.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 33.17, significantly up from last week's ADR of 5:45.



Source: NSE, INVES 21 Research

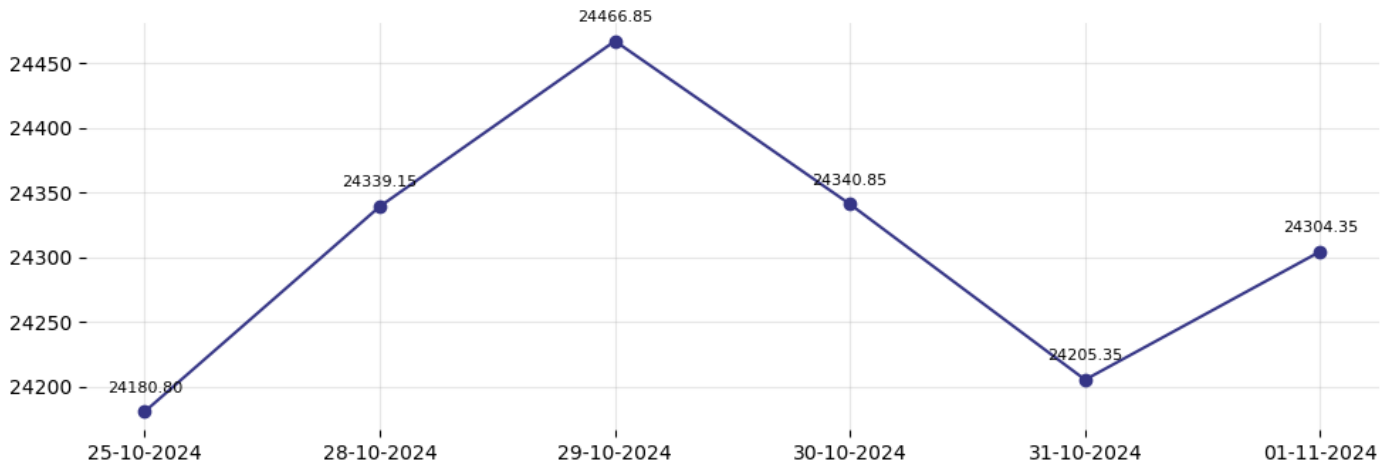
Sectoral Performance

- This week, all of the major sectoral indices posted a positive return.
- Nifty Media registered the highest positive return of 7.02%, among the major sectoral indices. HATHWAY, DISHTV, and TIPSMUSIC led to positive returns in the index.
- Nifty Realty posted a positive return of 3.57% this week. BRIGADE, PHOENIXLTD, and MAHLIFE were significant contributors to the index.
- Nifty Infrastructure registered a return of 1.80%, led by ONGC, IOC, and INDHOTEL.
- Nifty Bank posted a positive return of 1.75% this week. The top contributors to the index were PNB, IDFCFIRSTB, and CANBK.
- Nifty Auto posted a flat return of 0.03% this week. M&M, EICHERMOT, and TATAMOTORS were the top gainers in the index.
- Nifty IT posted a positive negative return this week; the index was down by -3.82%. COFORGE, HCLTECH, and TECHM 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 ₹-14,415.65 crore this week. The week ending Oct 18 saw an outflow of ₹-20,024.27 crore. DII showed net buying of ₹9,786.52 crore this week. DIIs had a net buying of ₹22,914.63 crore last week.

Participant	Amount (Cr.)
FII	-14,415.65
DII	9,786.52

Data: Cash Market; Source: NSE, NSDL

Economic Events

In September 2024, Indian banks' loan growth slowed to 14.4%, down from 15.3% a year earlier, as the Reserve Bank of India (RBI) took steps to control rapid lending in the retail sector. This moderation, which excludes the impact of HDFC Bank's merger with Housing Development Finance Corp, mainly reflects the RBI's efforts to curb the fast growth in personal and credit card loans.

India's business activity grew at a faster pace in October, supported by stronger demand in manufacturing. HSBC's flash Composite Purchasing Managers' Index (PMI), compiled by S&P Global, increased to 58.6 from September's 58.3, which was a 10-month low. This growth led to the fastest rate of job creation since February 2006, with gains in sales and production.

In September, major ports in India owned by the central government recorded a 6% growth in cargo, reaching 65 million metric tonnes, largely due to an increase in crude oil shipments and miscellaneous commodities. Export-import (Exim) cargo rose by nearly 9%, while coastal cargo saw a slight decline of 1.9%.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,949.2	24,126.8	24,312.5	24,490.1	24,675.8

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
ADANIANT	9.42%
LT	8.90%
EICHERMOT	6.60%
UPL	6.07%
SBIN	5.03%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TECHM	-5.44%
HCLTECH	-4.66%
INFY	-4.55%
MARUTI	-3.71%
BAJAJ-AUTO	-3.62%

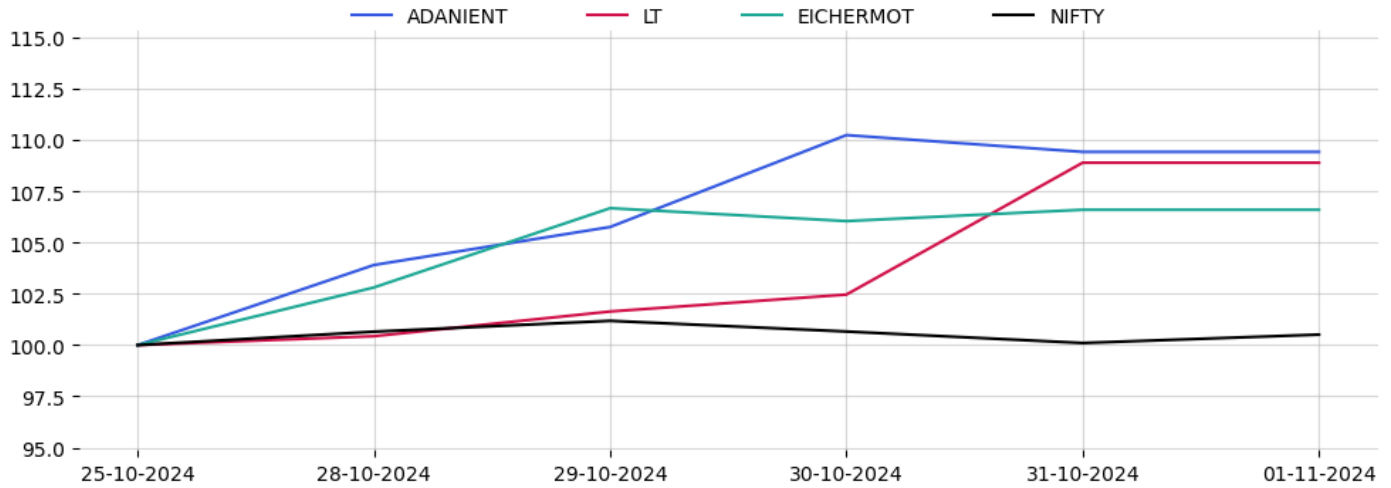
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	2,46,86,990
ICICIBANK	1,61,41,822
INDUSINDBK	1,49,00,577

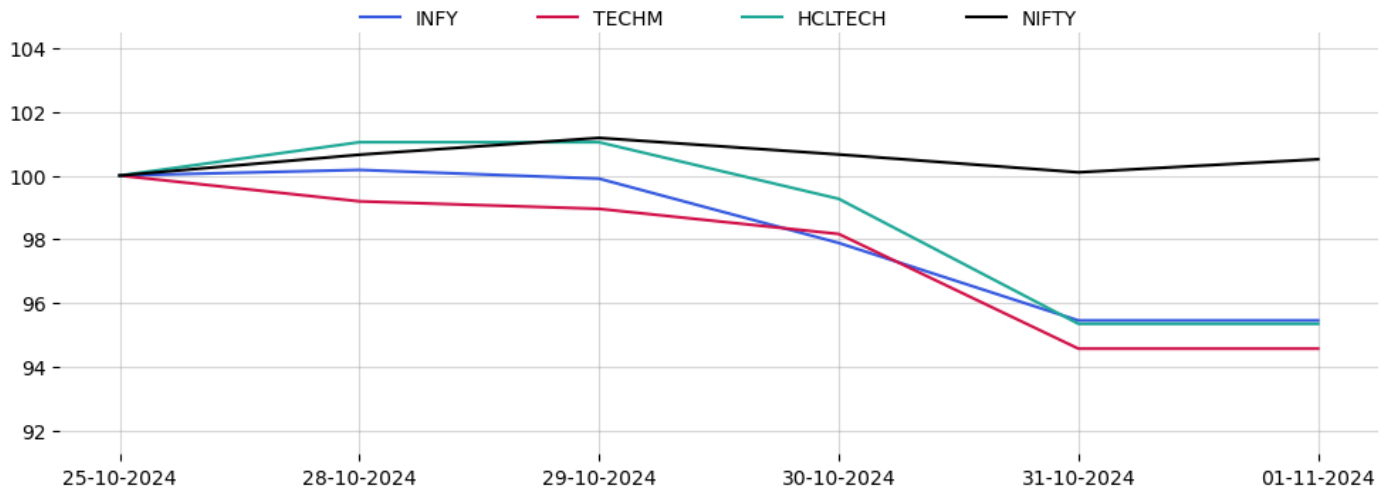
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



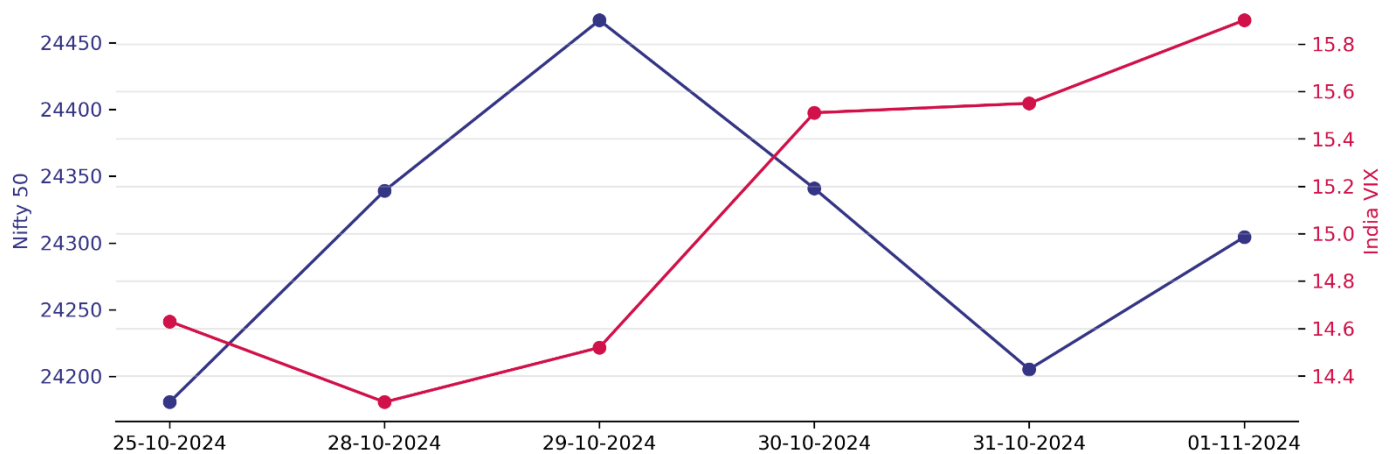
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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