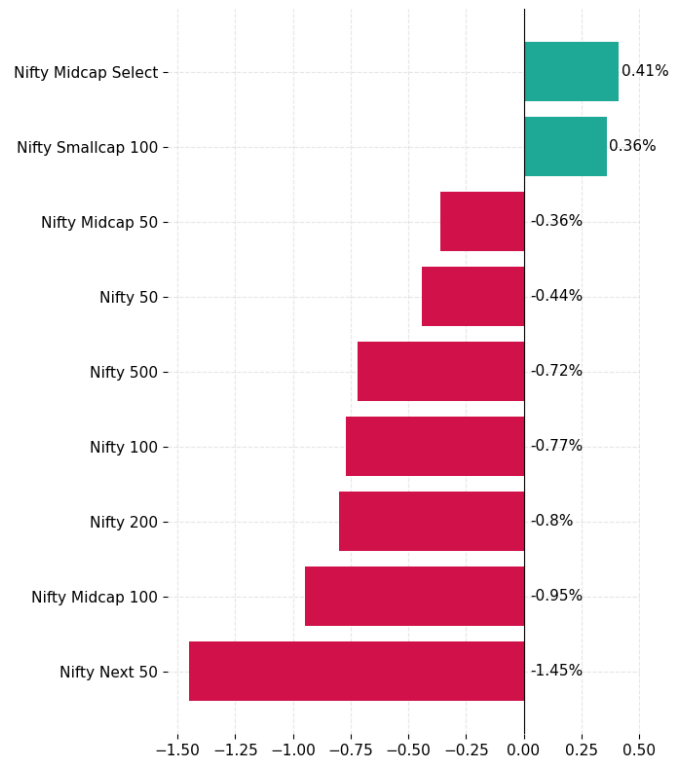


Indices Performance

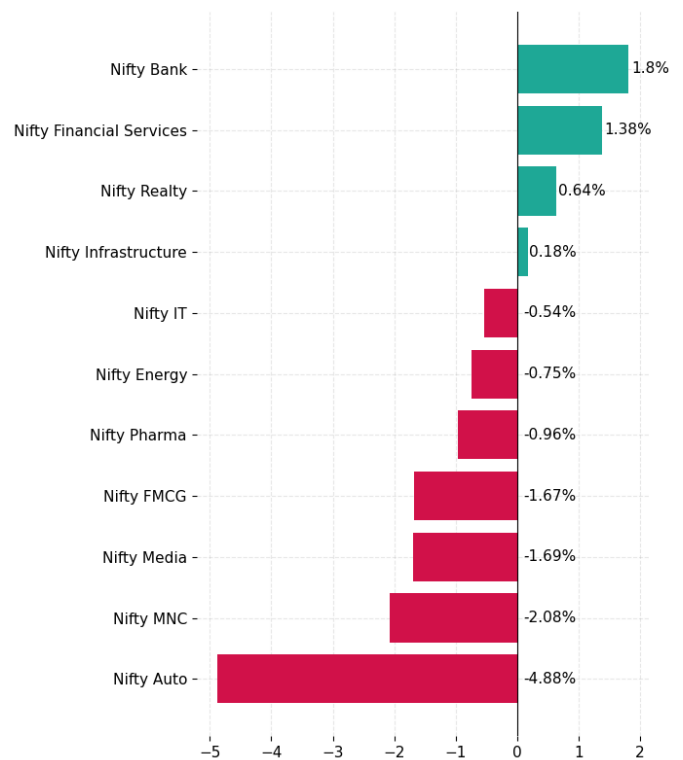
- This week, all major market indices posted a negative return except for the Midcap Select and Smallcap 100 Index.
- The Nifty 50 index was down by -0.44% this week. The Auto, Media, and FMCG sectors were the significant draggers in the index.
- Nifty 100 registered a -0.77% negative return this week. The top contributors to the index were BAJAJ-AUTO, LTIM, and NESTLEIND.
- Nifty Next 50 registered a return of -1.45% this week. DMART, COLPAL, and ZOMATO were the major draggers in the index.
- Nifty Midcap Select posted a positive return this week, with 0.41%. The top contributors to the midcap index were HINDPETRO, MPHASIS, and HDFCAMC.
- The Nifty Smallcap 100 index posted a positive return of 0.36% this week, led by ANGELONE, CENTURYTEX, and KARURVYAS.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 18:32, slightly down from last week's ADR of 21:29.



Source: NSE, INVES 21 Research

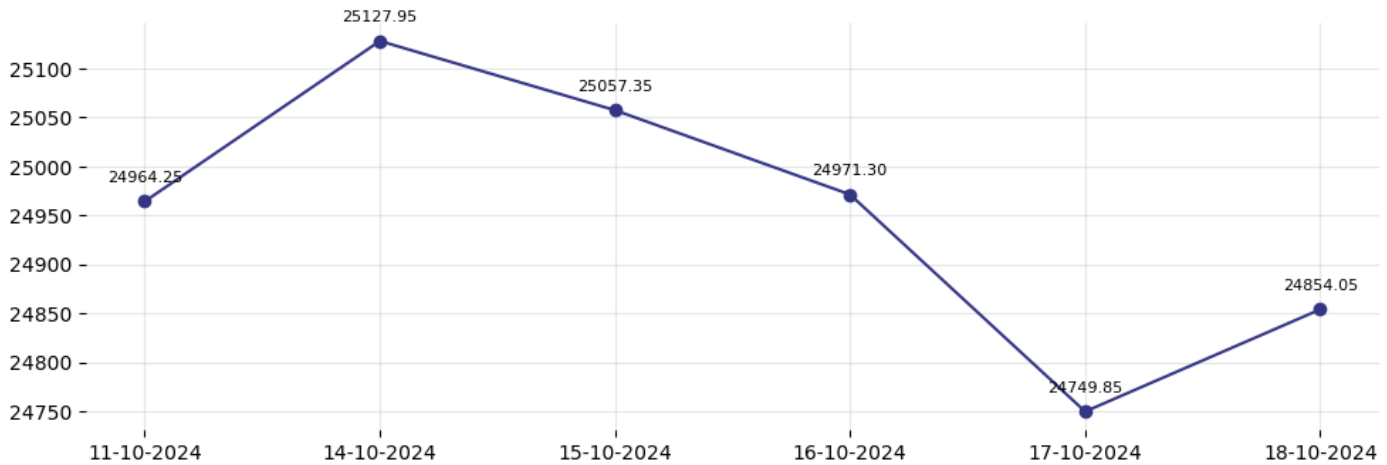
Sectoral Performance

- This week, 4 out of the 11 major sectoral indices posted a positive return.
- Nifty Bank registered the highest positive return among the major sectoral indices, with a return of 1.80%. FEDERALBNK, ICICIBANK, and SBIN led to positive returns in the index.
- Nifty Realty posted a positive return of 0.64% this week. RAYMOND, GODREJPROP, and DLF were significant contributors to the index.
- Nifty IT registered a negative return of -0.54%, led by the LTIM, INFY, and COFORGE.
- Nifty Pharma posted a negative return of -1.67% this week. The top contributors to the index were MANKIND, AJANTPHARM, and ZYDUSLIFE.
- Nifty FMCG posted a negative return of -1.69% this week. COLPAL, NESTLEIND, and UBL were the top draggers in the index.
- Nifty Auto posted a negative return this week; the index was down by -4.88%. BAJAJ-AUTO, EXIDEIND, and M&M 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 ₹-21,823.34 crore this week. The week ending Oct 12 saw an outflow of ₹-27,674.99 crore. DII showed net buying of ₹16,384.00 crore this week. DIIs had a net buying of ₹31,363.61 crore last week.

Participant	Amount (Cr.)
FII	-21,823.34
DII	16,384.00

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's Retail Inflation Hits Nine-Month High at 5.49% in September 2024. Retail inflation, measured by the Consumer Price Index (CPI), jumped to 5.49% in September 2024, up from 3.65% in August. This surge was driven by a low base effect and a sharp rise in vegetable prices. Prices of food and beverages rose by 8.36% in September, compared to a 5.3% increase in August. Vegetables saw the steepest rise, with prices soaring 35.99% year-over-year, much higher than the 10.7% increase in August. On a month-to-month basis, vegetable prices also grew by 3.5%.

Wholesale Inflation Rises to 1.84% in September 2024 on Food Price Surge. India's wholesale inflation accelerated to 1.84% in September 2024, up from 1.31% in August, driven by a sharp increase in food prices. While fuel and power prices fell by over 4% in September compared to a 0.67% decline in August, food inflation surged to 9.47% from 3.26% the previous month. Vegetable prices saw the biggest jump, rising 48.7% year-over-year, a stark reversal from the 10% drop in August. Cereal prices increased by 8.1% in September, slightly easing from the 8.4% rise in August.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,233.5	24,543.8	24,877.9	25,188.2	25,522.3

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
WIPRO	3.85%
ICICIBANK	3.39%
LT	2.74%
SBIN	2.58%
HDFCLIFE	2.57%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
BAJAJ-AUTO	-15.26%
LTIM	-6.54%
NESTLEIND	-6.43%
BAJFINANCE	-5.51%
M&M	-5.43%

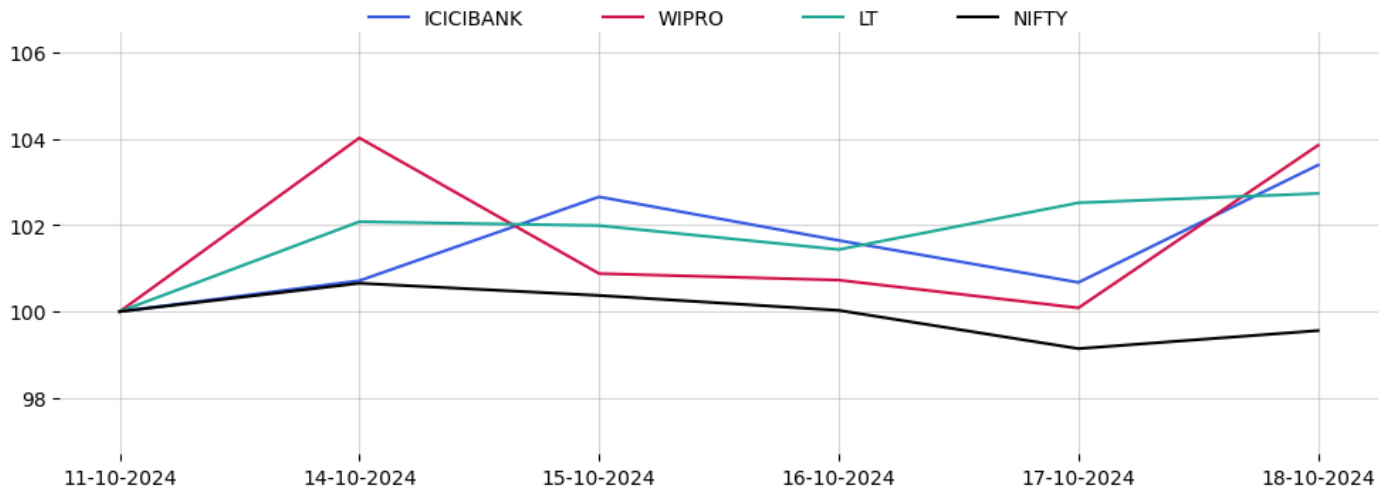
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	3,65,77,994
WIPRO	1,45,11,371
ONGC	1,33,91,733

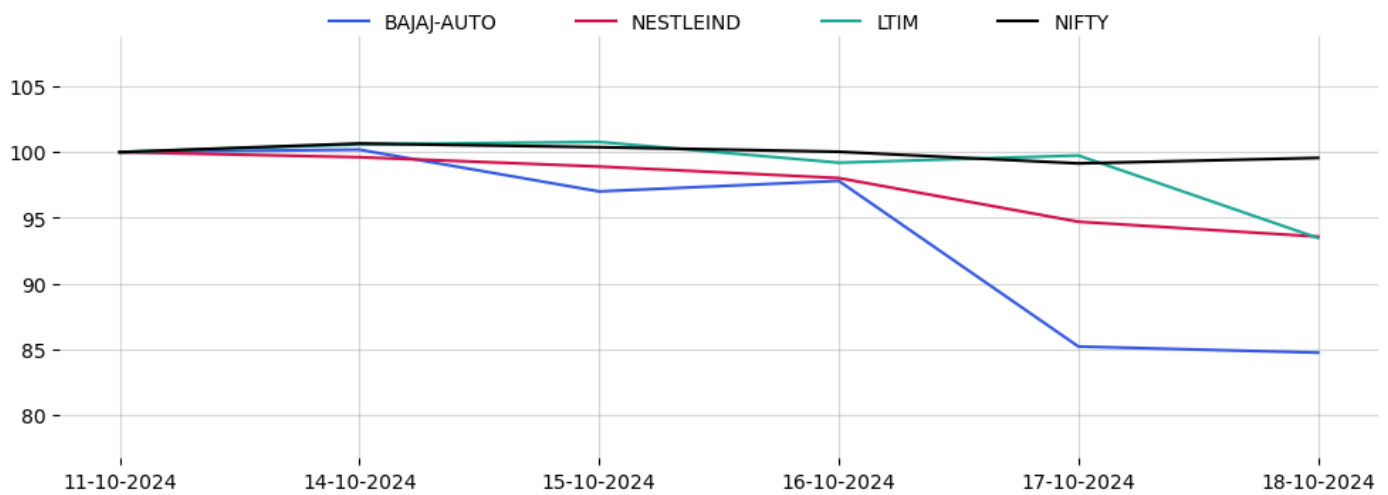
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



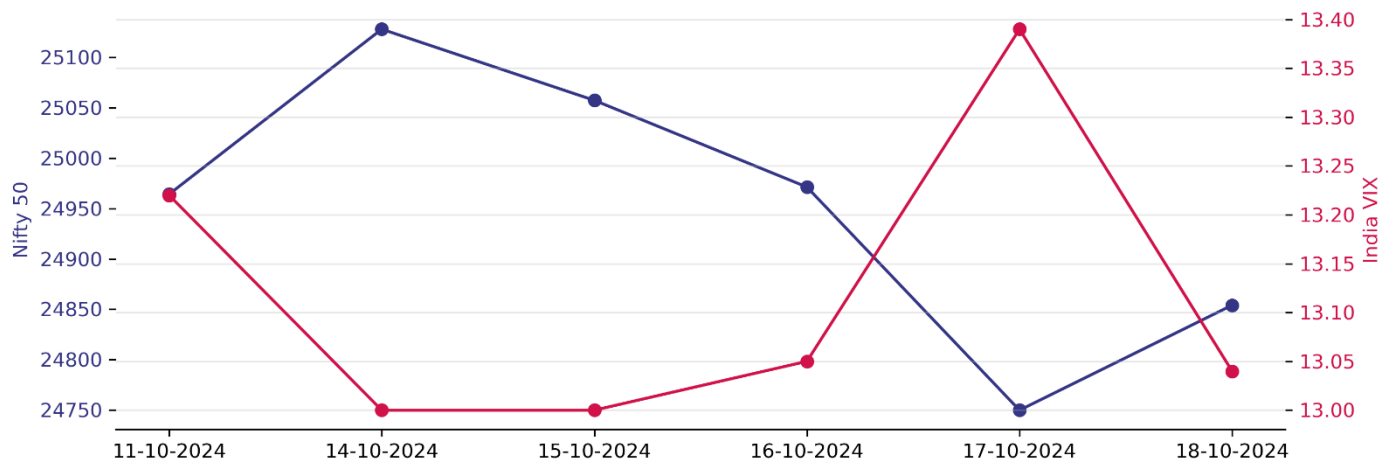
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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