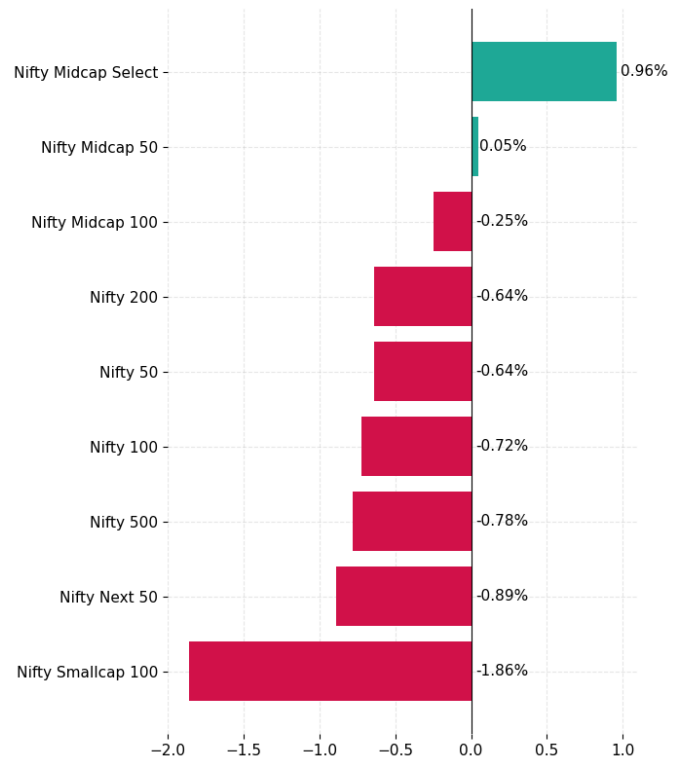


## Indices Performance

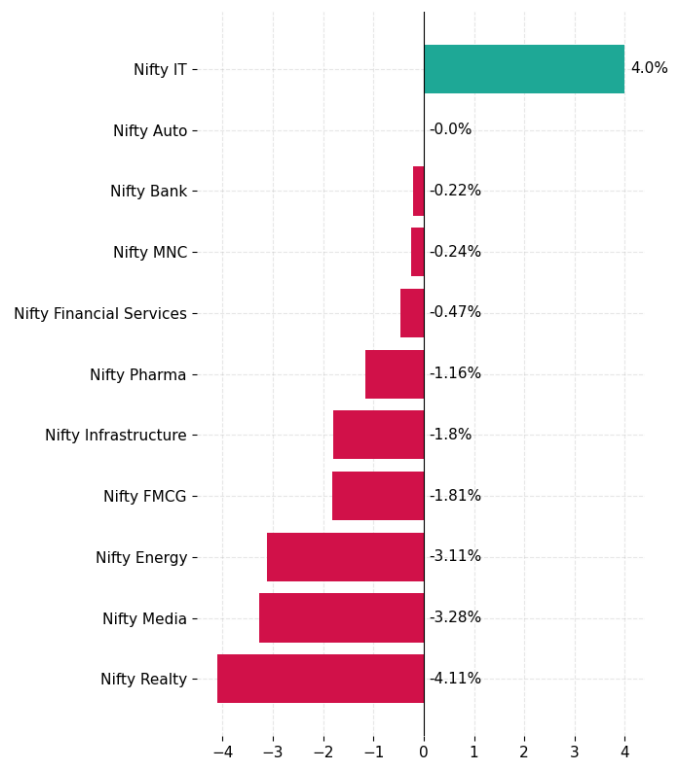
- This week, all major market indices posted a negative return, except for the Nifty Midcap Select and Midcap 50.
- The Nifty 50 index was down by -0.64% this week. However, the Nifty 50 Index was up last week.
- Nifty 100 registered a -0.72% negative return this week. The top contributors to the index were TRENT, MOTHERSON, and HINDALCO.
- Nifty Next 50 registered a negative return of -0.89% this week. MOTHERSON, RECLTD, and ABB were the major contributors to the index.
- Nifty Midcap Select posted a positive return this week, with 0.96%. The top contributors to the midcap index were DIXON, INDHOTEL, and ASHOKLEY.
- The Nifty Smallcap 100 index posted the negative return of -1.86% this week, led by the TRITURBINE, APARINDS, and FIVESTAR.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 20:30, significantly down from last week's ADR of 33:17.



Source: NSE, INVES 21 Research

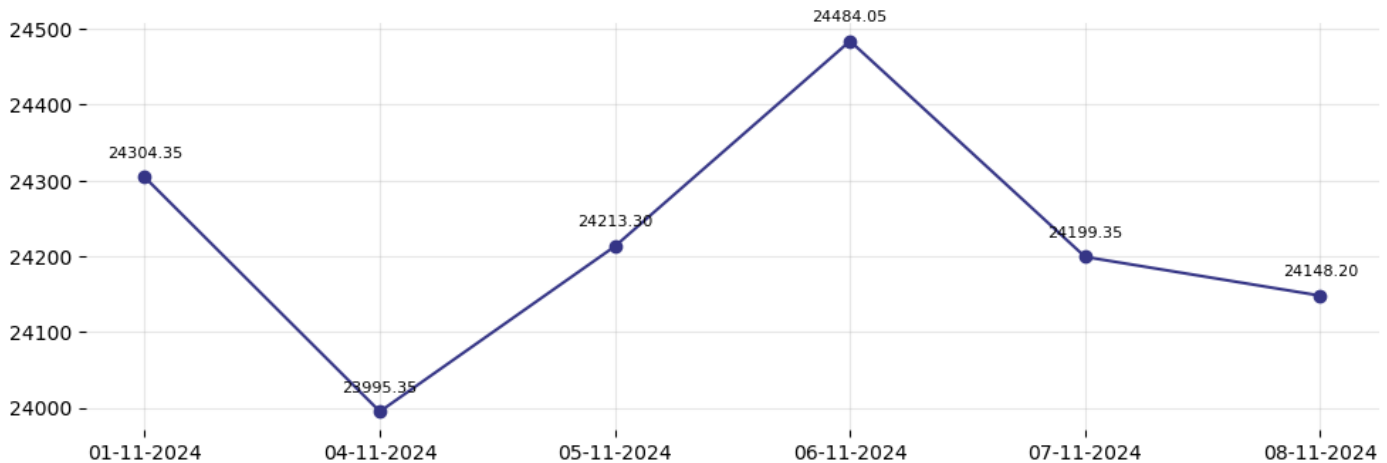
## Sectoral Performance

- This week, all of the major sectoral indices posted a negative return, except for the Nifty IT.
- Nifty IT registered the highest positive return of 4.0%, among the major sectoral indices. COFORGE, PERSISTENT, and TECHM led to positive returns in the index.
- Nifty Bank posted a negative return of -0.22% this week. AUBANK, ICICIBANK, and IDFCFIRSTB were significant contributors to the index.
- Nifty Pharma registered a return of -1.16%, led by AJANTPHARM, JBCHEPHARM, and AUROPHARMA.
- Nifty FMCG posted a negative return of -1.81% this week. The top contributors to the index were COLPAL, BALRAMCHIN, and PGHH.
- Nifty Auto posted a flat return of -0.00% this week. ASHOKLEY, M&M, and MARUTI were the top gainers in the index.
- Nifty Realty posted a negative return this week; the index was down by -4.11%. BRIGADE, GODREJPROP, and PHOENIXLTD 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 ₹-19,637.60 crore this week. The week ending Nov 1 saw an outflow of ₹-14,415.65 crore. DII showed net buying of ₹14,391.51 crore this week. DIIs had a net buying of ₹9,786.52 crore last week.

Participant	Amount (Cr.)
FII	-19,637.60
DII	14,391.51

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's services sector showed strong growth in October, with the Purchasing Managers' Index (PMI) rising to 58.5 from 57.7 in September, signaling robust expansion. This improvement was driven by increased output, new business orders, and job creation, supported by strong demand and sales pipelines. A PMI above 50 indicates growth, highlighting positive economic momentum in India's services industry.

India's manufacturing sector saw solid growth in October, with the HSBC Manufacturing PMI rising from 56.5 in September to 57.5, indicating an accelerated improvement in operating conditions. This uptick was fueled by stronger demand for Indian goods, signaling a healthy expansion in the sector.

In October, foreign institutional investors (FIIs) sold a record ₹1.1 trillion in Indian shares from the cash market, marking the highest monthly outflow on record and unsettling investor confidence. This selloff is driven by concerns such as the U.S. presidential election and Q2 FY2025 earning results.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,445.9	23,797.0	24,167.3	24,518.5	24,888.8

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
M&M	5.58%
APOLLOHOSP	5.54%
TECHM	4.85%
HCLTECH	4.56%
TCS	4.09%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
HINDALCO	-5.85%
ASIANPAINT	-5.80%
GRASIM	-5.71%
HEROMOTOCO	-5.01%
TATAMOTORS	-4.51%

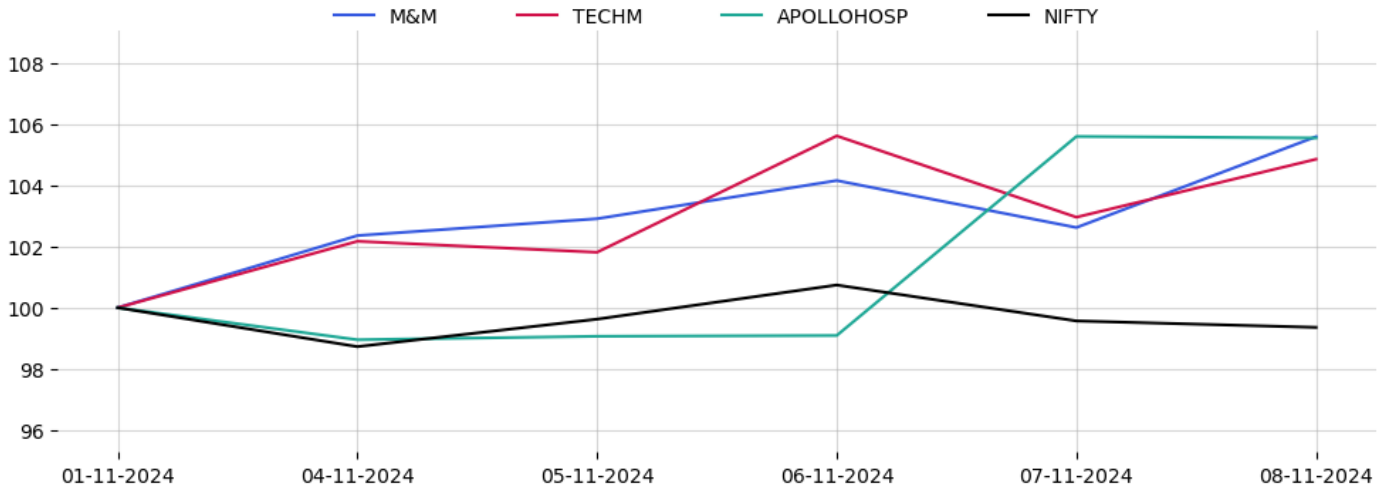
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	4,54,35,812
SBIN	1,64,69,208
RELIANCE	1,48,73,882

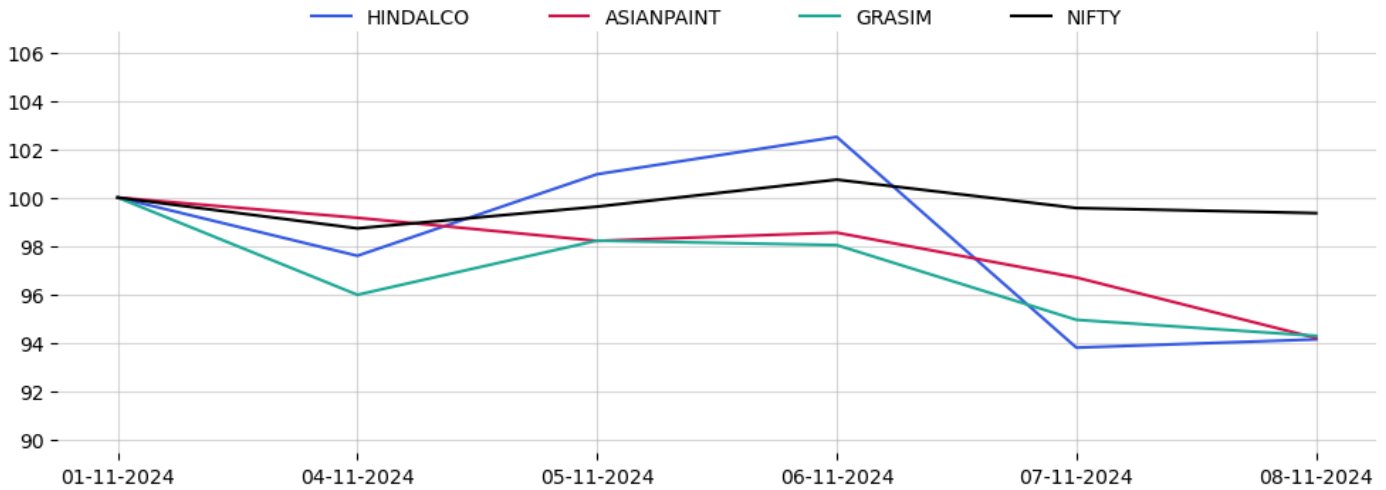
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



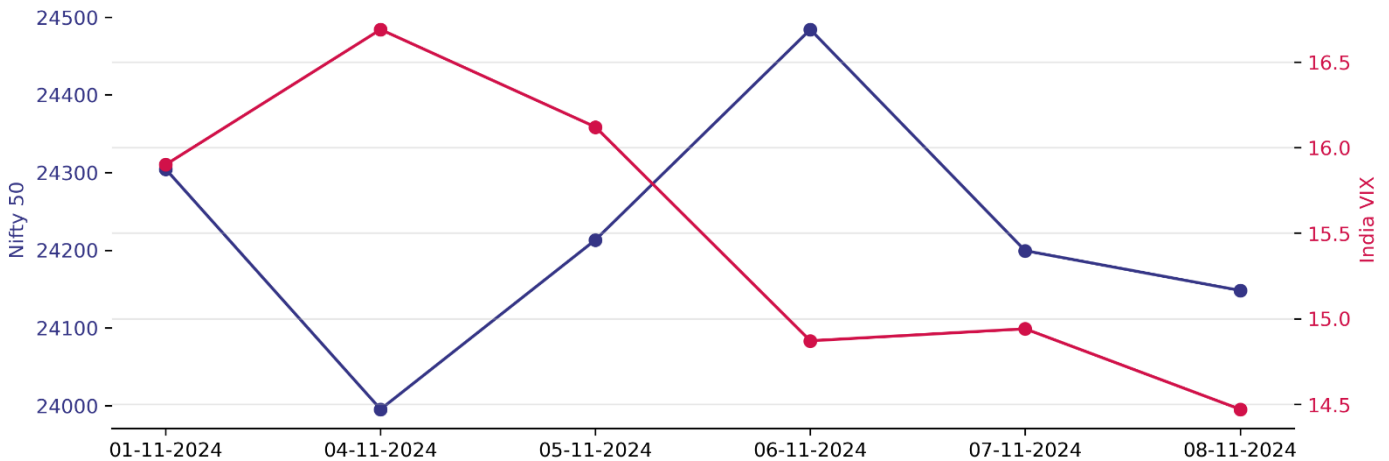
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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