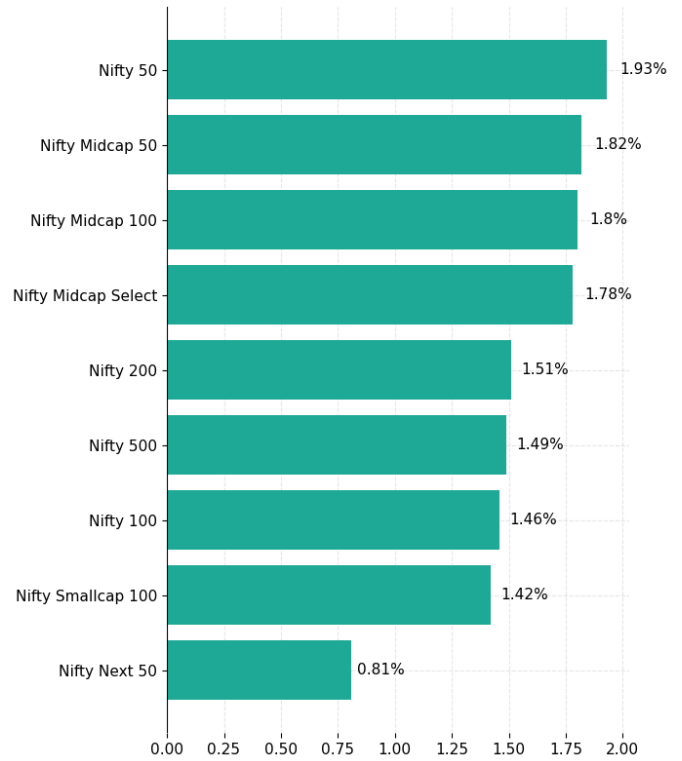


Indices Performance

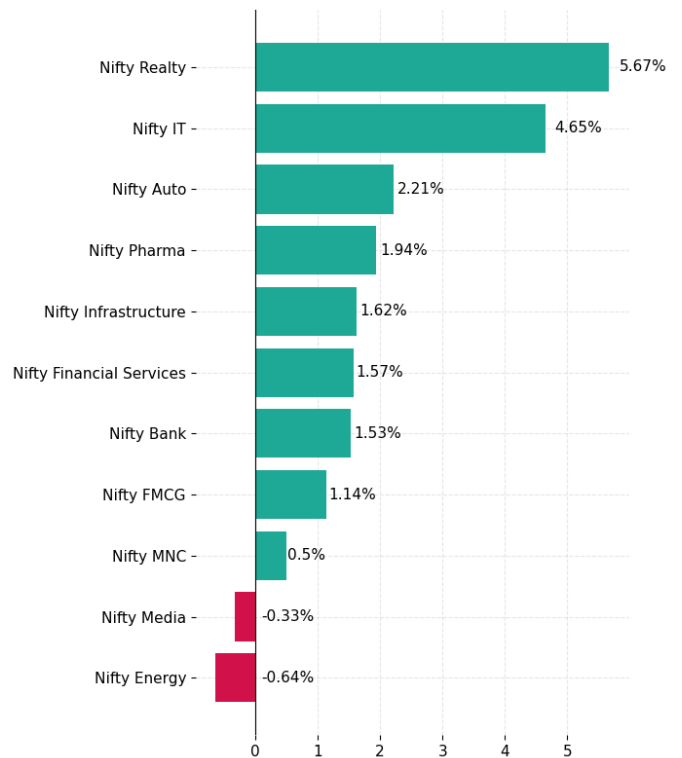
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 1.93% this week. The Realty, IT, and Auto sectors were the significant contributors in the index.
- Nifty 100 registered a 1.46% positive return this week. The top contributors to the index were EICHERMOT, M&M, and DLF.
- Nifty Next 50 registered a return of 0.81% this week. INDIGO, VBL, and BHEL were the major contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with 1.78% and 1.82%, respectively. The top contributors to the midcap index were GODREJPROP, INDHOTEL, and POLYCAB.
- The Nifty Smallcap 100 index posted a positive return of 1.42% this week, led by NATIONALUM, SWANENERGY, and RAYMOND.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 38:12, significantly down from last week's ADR of 6:44.



Source: NSE, INVES 21 Research

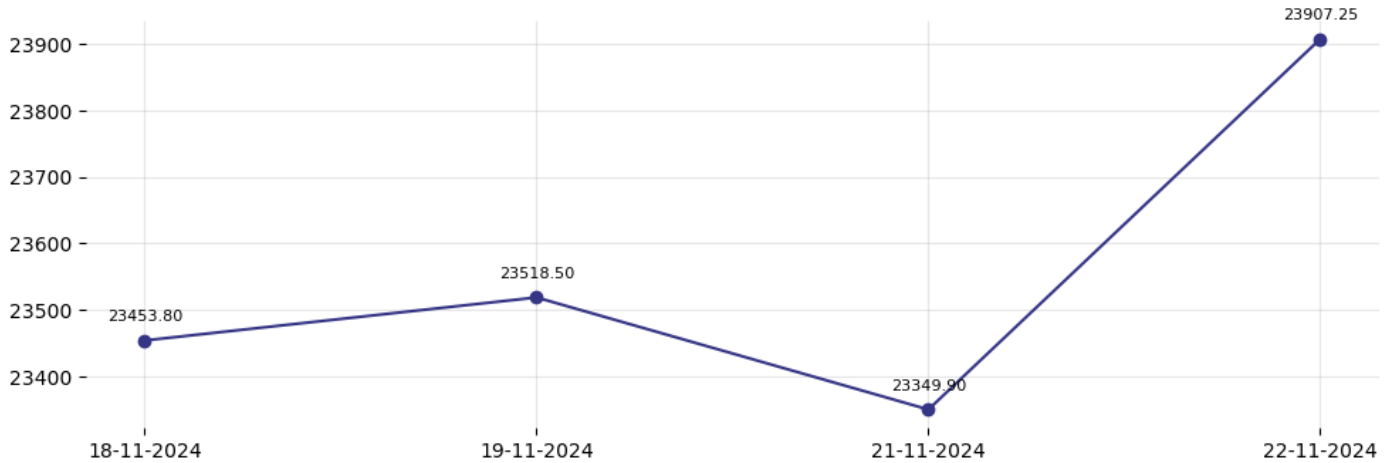
Sectoral Performance

- This week, all the major sectoral indices posted a positive return, except for Nifty Media and Nifty Energy.
- Nifty Realty registered the highest positive return among the major sectoral indices, with a return of 5.67%. PHOENIXLTD, GODREJPROP, and BRIGADE led to negative returns in the index.
- Nifty IT posted a positive return of 4.65% this week. TECHM, COFORGE, and LTIM were significant contributors to the index.
- Nifty Auto registered a positive return of 2.21%, led by the M&M, HEROMOTOCO, and MRF.
- Nifty Bank posted a positive return of 1.53% this week. The top contributors to the index were FEDERALBNK, KOTAKBANK, and HDFCBANK.
- Nifty FMCG posted a positive return of 1.14% this week. VBL, UNITDSPR, and HINDUNILVR were the top draggers in the index.
- Nifty Energy posted a negative return this week; the index was up by -0.64%. ADANIGREEN, ADANIPOWER, and BPCL 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 ₹-13,264.05 crore this week. The week ending Nov 17 saw an outflow of ₹-9,683.64 crore. DII showed net buying of ₹13,518.57 crore this week. DIIs had a net buying of ₹12,508.14 crore last week.

Participant	Amount (Cr.)
FII	-13,264.05
DII	13,518.57

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's foreign exchange reserves fell by \$17.7 billion, reaching \$657.89 billion as of November 15, according to the Reserve Bank of India (RBI). This decline, detailed in the RBI's Weekly Statistical Supplement, was mainly due to a \$15.5 billion drop in Foreign Currency Assets (FCAs), which now stand at \$569.84 billion. Additionally, gold reserves decreased by \$2 billion to \$65.7 billion, while Special Drawing Rights (SDRs) and the reserve position in the International Monetary Fund (IMF) fell by \$94 million and \$51 million, respectively, bringing their totals to \$18 billion and \$4.2 billion. Despite the decline, India remains one of the world's top holders of foreign exchange reserves.

The Reserve Bank of India (RBI) has reported that India's economic slowdown in the second quarter of 2024-25 has eased, with private consumption once again driving domestic demand, supported by increased festival spending in the third quarter. RBI Deputy Governor Michael Patra highlighted that the economy has picked up pace, while globally, economic activity showed resilience despite challenges like rising protectionism and weak confidence.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,015.9	23,461.6	23,708.8	24,154.5	24,401.8

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
POWERGRID	7.98%
ULTRACEMCO	7.00%
M&M	5.83%
TCS	5.60%
UPL	5.49%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ADANIENT	-20.96%
ADANI PORTS	-11.14%
SBILIFE	-4.96%
BRITANNIA	-1.28%
BPCL	-1.16%

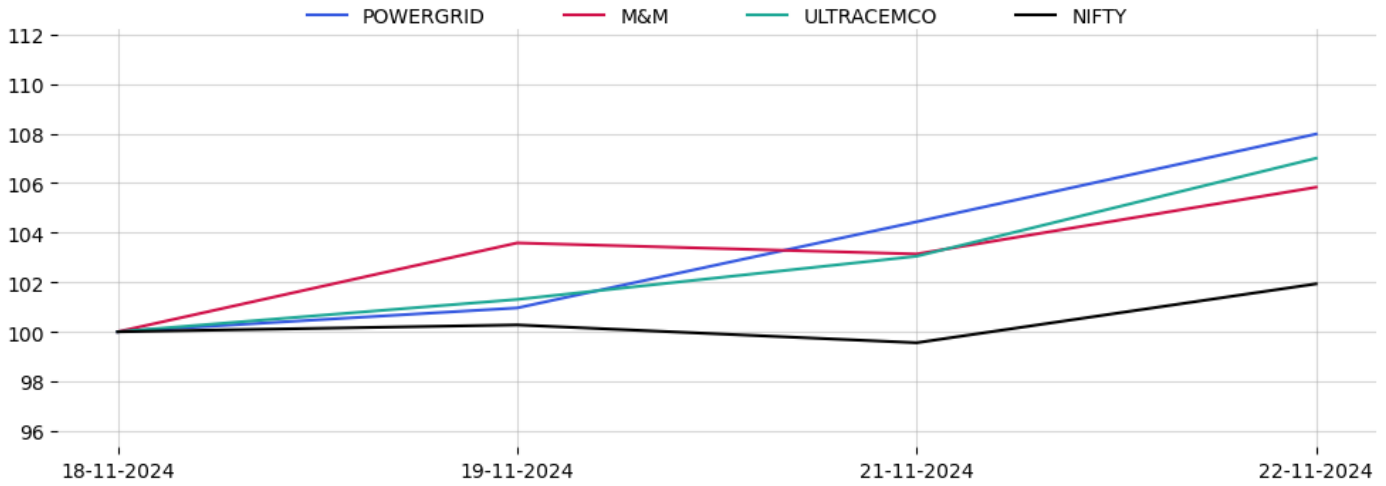
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	44,988,666
POWERGRID	19,873,728
ADANI PORTS	19,522,568

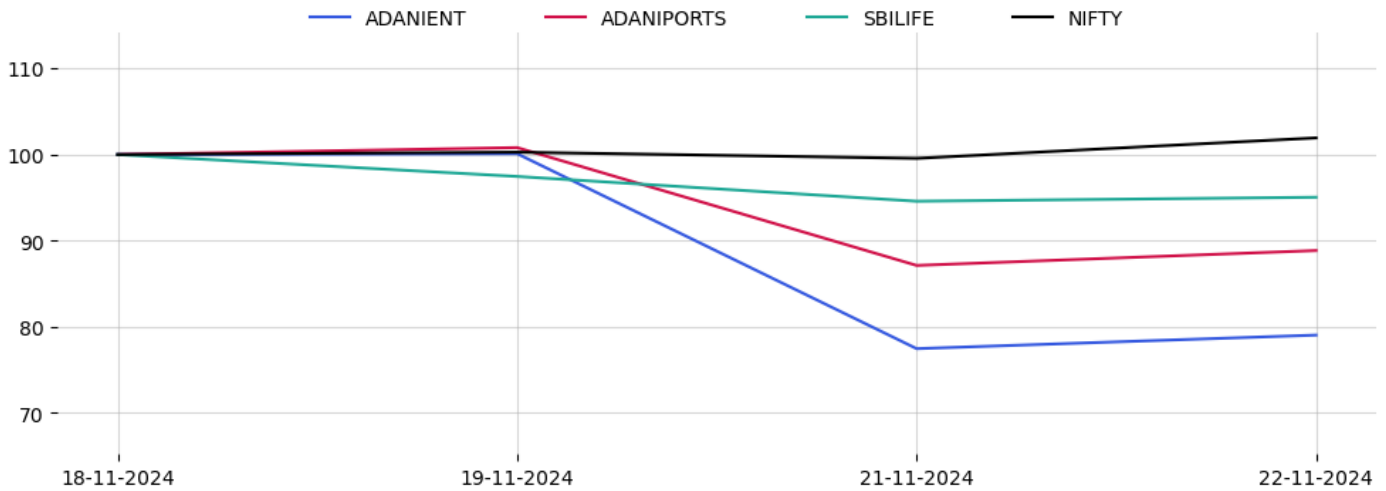
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



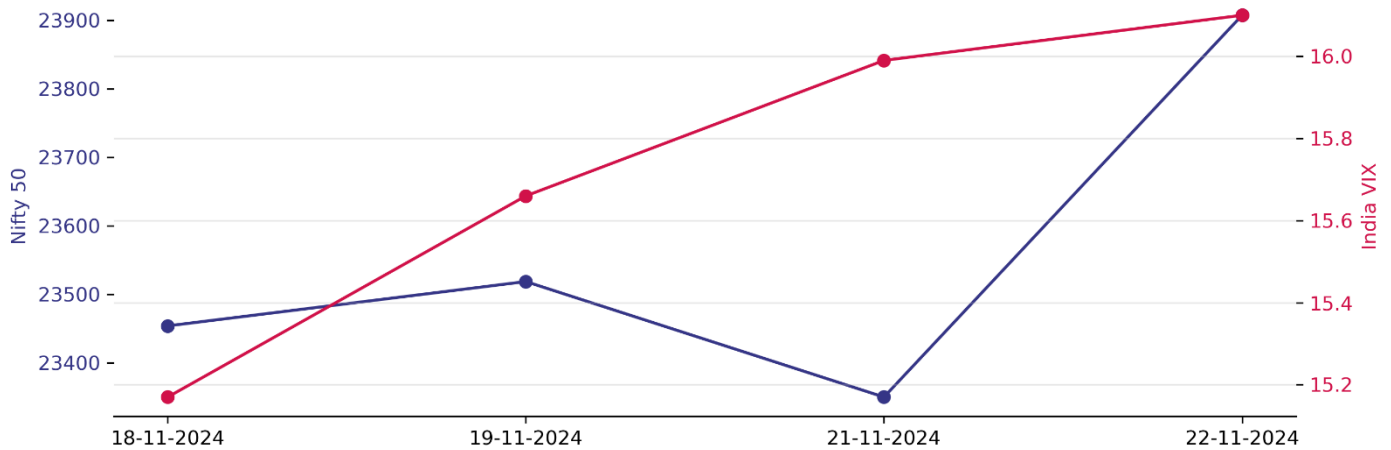
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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