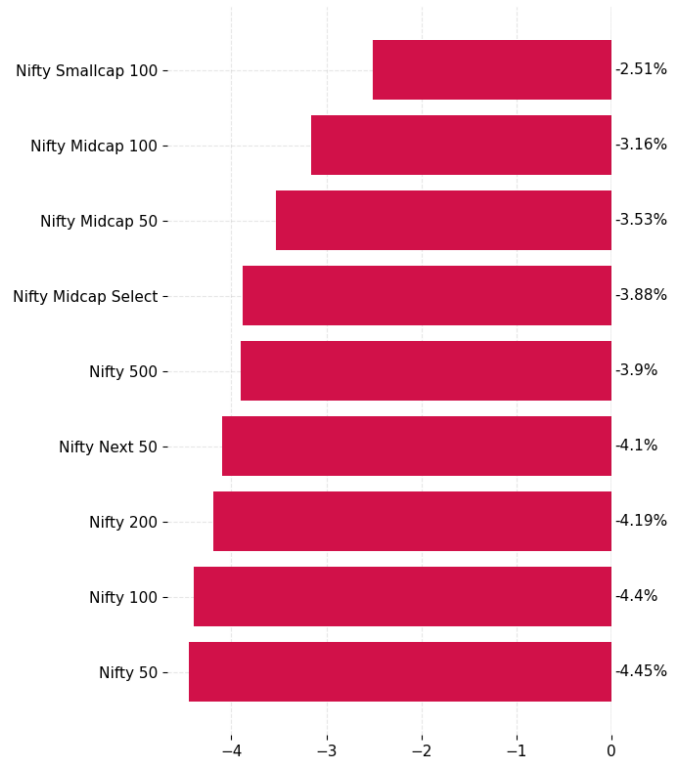


Indices Performance

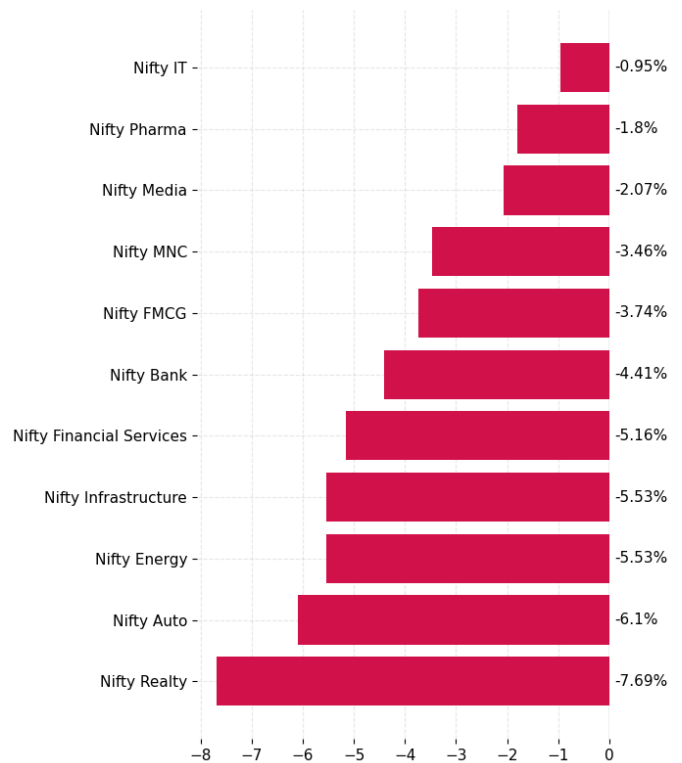
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -4.45% this week. The Realty, Auto, and Energy sectors were the significant draggers in the index.
- Nifty 100 registered a -4.40% negative return this week. The top contributors to the index were LODHA, ADANIGREEN, and JSWENERGY.
- Nifty Next 50 registered a return of -4.10% this week. DMART, CHOLAFIN, and DMART were the major draggers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -3.88% and -3.53%, respectively. The top contributors to the midcap index were GODREJPROP, SUZLON, and PHOENIXLTD.
- The Nifty Smallcap 100 index posted a negative return of -2.51% this week, led by SWSOLAR, INTELLECT, and RITES.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 5:45, significantly down from last week's ADR of 41:9.



Source: NSE, INVES 21 Research

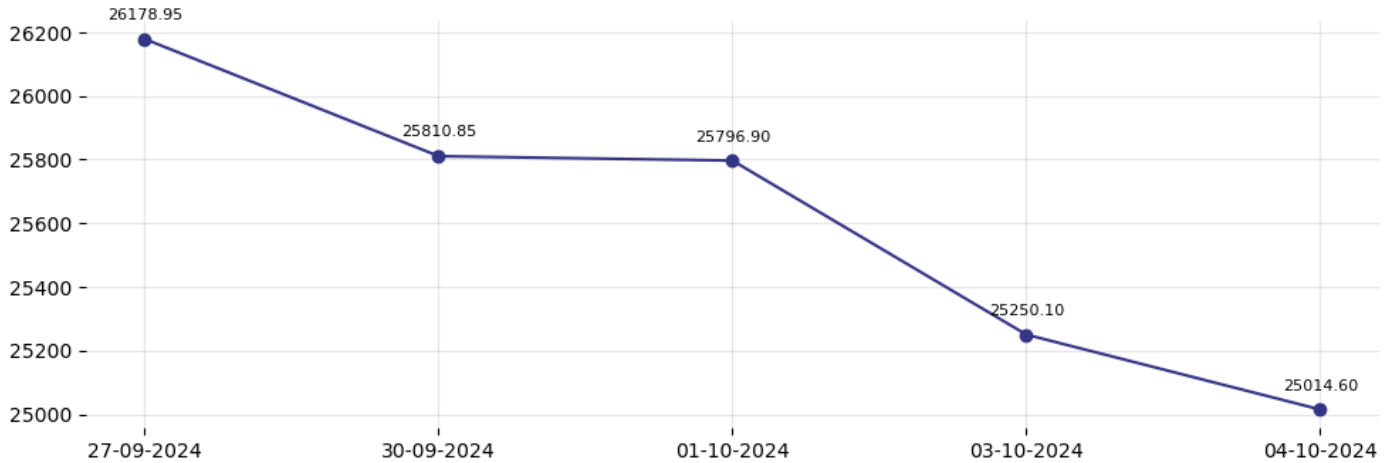
Sectoral Performance

- This week, all the major sectoral indices posted a negative return.
- Nifty Realty registered the lowest negative return among the major sectoral indices, with a return of -7.69%. LODHA, GODREJPROP, and SOBHA led to negative returns in the index.
- Nifty Auto posted a negative return of -6.10% this week. APOLLOTYRE, HEROMOTOCO, and TVSMOTOR were significant contributors to the index.
- Nifty Energy registered a negative return of -5.53%, led by the ADANIGREEN, RELIANCE, and POWERGRID.
- Nifty Bank posted a negative return of -4.41% this week. The top contributors to the index were AXISBANK, HDFCBANK, and ICICIBANK.
- Nifty FMCG posted a negative return of -3.74% this week. DABUR, VBL, and UNITDSPR were the top draggers in the index.
- Nifty IT posted a negative return this week; the index was down by -0.95%. LTTS, MPHASIS, and PERSISTENT 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 ₹-40,511.50 crore this week. The week ending Sep 27 saw an outflow of ₹-3,932.80 crore. DII showed net buying of ₹33,074.39 crore this week. DIIs had a net buying of ₹15,961.71 crore last week.

Participant	Amount (Cr.)
FII	-40,511.50
DII	33,074.39

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's services sector grew at its slowest pace in 10 months in September, with the HSBC India Services PMI dropping to 57.7 from 60.9 in August. This slowdown was driven by cost pressures and a weaker rise in international orders for domestic firms, according to a survey by S&P Global. Despite the drop, the PMI has remained above 50, indicating continued expansion for 35 straight months.

Similarly, India's manufacturing activity slowed to an eight-month low in September, with the HSBC India Manufacturing PMI dropping to 56.5 from 57.5 in August. This decline was driven by a slower pace of factory production and sales, while international orders rose at their weakest rate in a year and a half, according to a survey by S&P Global.

The HSBC India Composite Output Index, which reflects manufacturing and services activity, fell to 58.3 in September from 60.7 in August. Despite the slowdown, the PMI remained above 50, indicating continued growth in the sector.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,204.1	24,609.4	25,372.0	25,777.3	26,539.9

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
JSWSTEEL	3.22%
INFY	0.60%
TECHM	0.45%
TATASTEEL	0.12%
HINDALCO	0.10%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
RELIANCE	-9.15%
AXISBANK	-7.44%
BPCL	-7.36%
HEROMOTOCO	-7.33%
ASIANPAINT	-7.20%

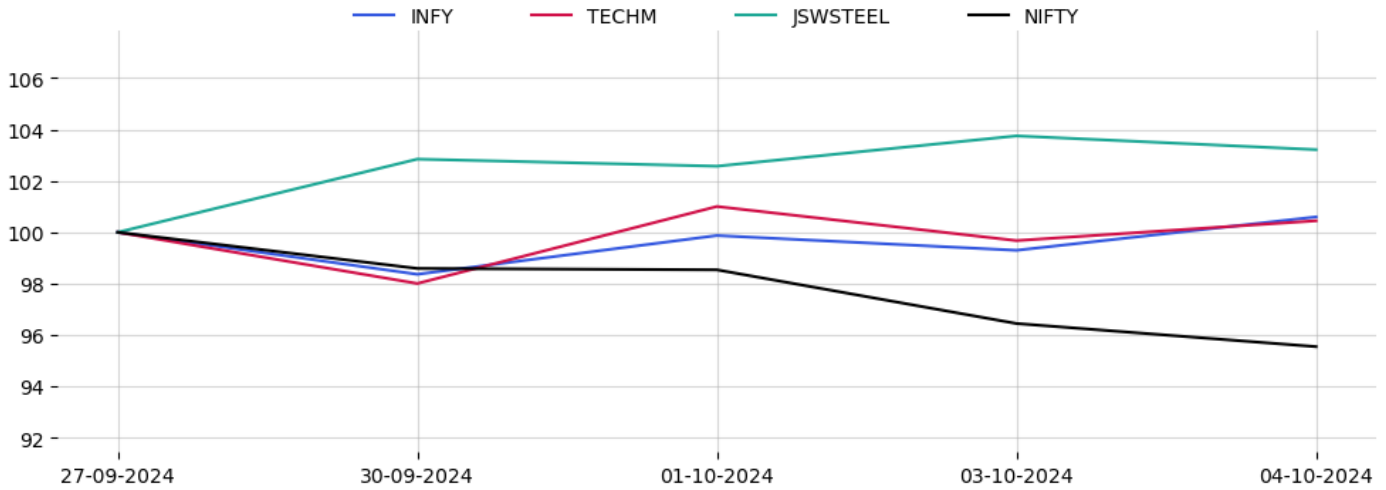
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	69,150,529
NTPC	24,536,326
ONGC	22,825,421

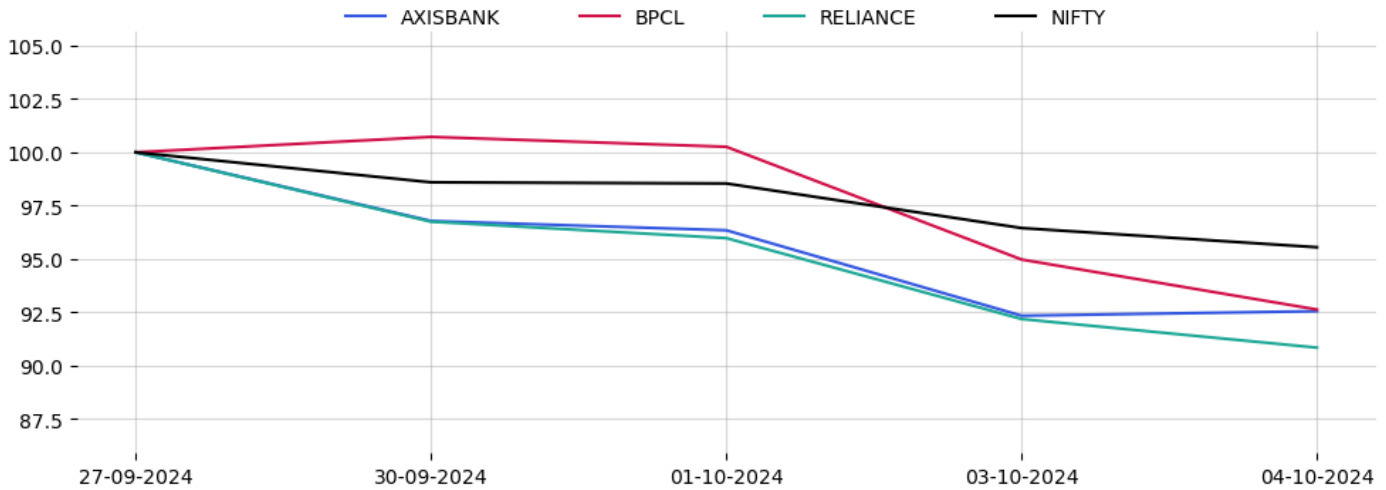
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



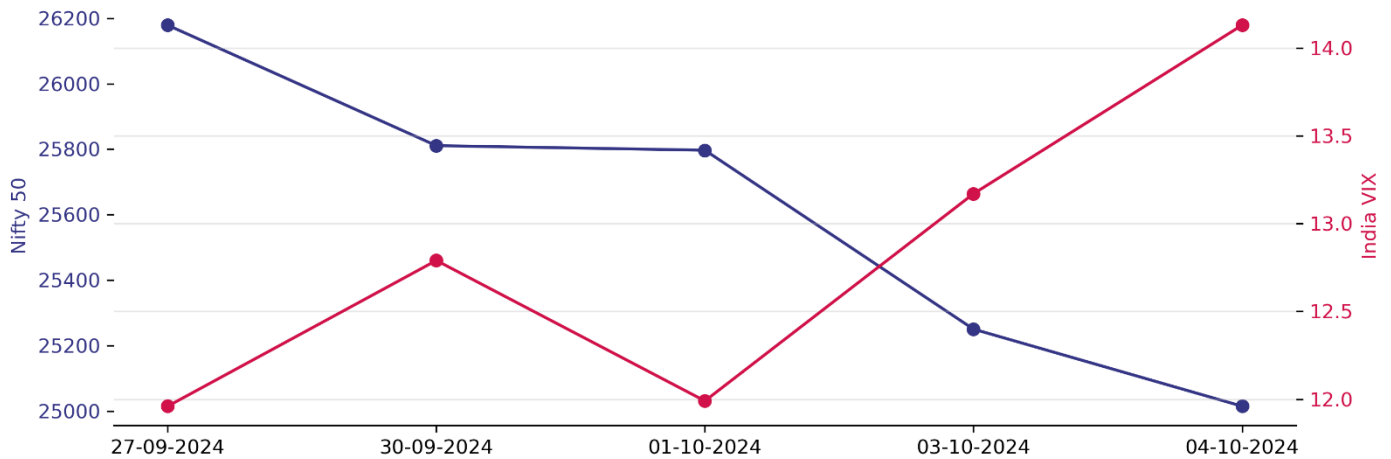
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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