

Market Snapshot

KEY INDICES	31-Oct-25	24-Oct-25	05-Sep-25
S&P CNX NIFTY	25722.10	25795.15	-0.28
SENSEX	83938.71	84211.88	-0.32
NIFTY MIDCAP 100	59825.90	59231.20	1.00
NIFTY SMLCAP 100	18380.80	18253.35	0.70

(Source: Capitaline, [Investing.com](https://www.investing.com))

Sectoral Snapshot

KEY INDICES	31-Oct-25	24-Oct-25	%Ch
NIFTY BANK	58101.45	58385.25	-0.49%
NIFTY AUTO	26841.80	26948.90	-0.40%
NIFTY FMCG	56153.70	56615.35	-0.82%
NIFTY IT	35653.05	36090.10	-1.21%
NIFTY METAL	10652.80	10777.50	-1.16%
NIFTY PHARMA	22442.60	22430.70	0.05%
NIFTY REALTY	968.65	950.50	1.91%
BSE CG	70525.60	70021.69	0.72%
BSE CD	60426.20	61094.48	-1.09%
BSE Oil & GAS	28915.41	28521.75	1.38%
BSE POWER	6925.19	7011.14	-1.23%

(Source: [Investing.com](https://www.investing.com))

FII & DII Activities (Rs Crore)

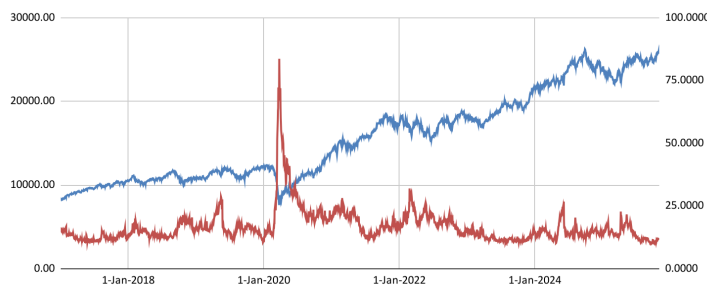
24/10/2025 to 31/10/2025

Activities	FIIs	DIIIs
Buy	97300.81	96177.55
Sell	90816.61	77200.16
Net	6484.20	18977.39

(Source: Capitaline)

Nifty Vs. INDIA VIX

NIFTY (LHS) and INDIA VIX (RHS)



(Source: [NSE](https://www.nseindia.com))

Sensex, Nifty end with minor cuts; Nifty closes below 25,750 mark

The key domestic indices ended with moderate losses amid weak global cues. Investors' sentiment remained cautious due to uncertainty surrounding US-China trade talks and the US Federal reserve's policy trajectory. However, traders will focus on the upcoming Q2 results from Bharati Airtel, Tata Consumer Products, Adani Ports, Adani Enterprises, Ambuja Cements etc, slated for next week. Attention will also remain on global market trends, crude oil movement, and macroeconomic data for cues.

In the week ended on Friday, 31 October 2025, the S&P BSE Sensex declined 273.17 points or 0.32% to settle at 83,938.71. The Nifty 50 index fell 73.05 points or 0.28% to settle at 25,722.10. The BSE Mid-Cap index rose 0.96% to close at 47,044.59. The BSE Small-Cap added 0.67% to end at 53,876.14.

India's foreign exchange reserves rose by \$4.496 billion to \$702.28 billion for the week ending 17 October, mainly driven by an increase in the value of gold reserves, the Reserve Bank of India (RBI) said on Friday. Meanwhile, the

Sensex Gainers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
INDUSINDBK	794.10	755.40	5.12
TATASTEEL	182.95	174.50	4.84
SBIN	937.00	904.40	3.60
LT	4031.20	3904.35	3.25
RELIANCE	1486.50	1451.45	2.41

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
BAJFINANCE	1042.60	1089.35	-4.29
KOTAKBANK	2101.95	2186.85	-3.88
M&M	3486.35	3624.80	-3.82
BAJAJFINSV	2088.20	2159.65	-3.31
INFY	1482.50	1525.40	-2.81

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
IOC	165.90	150.37	10.33
BPCL	356.80	330.45	7.97
UPL	720.10	672.05	7.15
SBILIFE	1955.70	1839.80	6.30
JSWSTEEL	1206.00	1141.40	5.66

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
DRREDDY	1197.60	1283.60	-6.70
CIPLA	1501.30	1584.40	-5.24
BAJFINANCE	1042.80	1089.75	-4.31
KOTAKBANK	2102.20	2187.00	-3.88
M&M	3487.20	3625.00	-3.80

(Source: Capitaline)

value of gold reserves rose sharply by \$6.181 billion to \$108.546 billion during the week.

India's reserve position with the International Monetary Fund (IMF) fell by \$30 million to \$4.602 billion in the reporting week, according to RBI data.

India's Index of industrial production recorded a growth of 4% in September 2025 compared to September 2024. The growth rates of the three sectors, Mining, Manufacturing and Electricity for the month of September 2025 are - 0.4%, 4.8% and 3.1% respectively. India's industrial production growth has eased marginally in September compared to 4.1% in August.

US-China Trade Talk:

U.S. President Donald Trump hailed his meeting with Chinese President Xi Jinping on Thursday (30 October 2025) as a "roaring success," announcing that the U.S. would reduce tariffs on Chinese goods while Beijing agreed to resume exports of rare earth elements and purchase American soybeans.

Trump also said tariffs on fentanyl-related products from China would be lowered from 20% to 10%, bringing the overall average tariff rate on Chinese imports down from 57% to 47%.

He added that discussions included the potential export of advanced computer chips to China, with Nvidia expected to hold talks with Chinese officials. Trump said he could sign a trade deal with China "pretty soon."

Despite the upbeat tone, investors remained cautious, citing a lack of concrete details and Trump's history of shifting rhetoric on China as reasons for uncertainty.

Global market:

The European Central Bank (ECB) kept its key deposit rate at 2% despite annual price growth rising to 2.2% across the

Nifty Midcap 100 Gainers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
BHEL	265.49	230.94	14.96
NAVINFLUOR	5687.40	5056.50	12.48
HINDPETRO	476.00	438.45	8.56
POLICYBZR	1785.40	1685.70	5.91
ABCAPITAL	324.20	306.15	5.90

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	31-Oct-25	24-Oct-25	%Ch
IDEA	8.73	9.62	-9.25
BATAINDIA	1070.60	1165.10	-8.11
BANDHANBNK	156.56	170.00	-7.91
ADANIPOWER	157.85	167.72	-5.88
TUBEINVEST	3023.00	3159.20	-4.31

(Source: Capitaline)

World Markets

KEY INDICES	31-Oct-25	24-Oct-25	%Ch
DJIA	47562.87	47207.12	0.75
NASDAQ	23724.96	23204.87	2.24
BOVESPA	149540.00	146172.20	2.30
FTSE 100	9717.25	9645.62	0.74
CAC 40	8121.07	8225.63	-1.27
DAX	23958.30	24239.89	-1.16
MOEX RUSSIA	2525.20	2543.93	-0.74
NIKKEI 225	52411.34	49299.65	6.31
HANG SENG	26183.46	26160.15	0.09
STRAITS TIMES	4428.62	4422.21	0.14
SHANGHAI COMPOSITE	3954.79	3941.59	0.33
JAKARTA	8163.88	8271.72	-1.30

(Source: Capitaline, [Investing.com](https://www.investing.com))

20-member euro bloc in September, up from 2% in August and 1.7% a year earlier.

Japan's central bank kept its benchmark interest rate unchanged at 0.5% in its first policy meeting after Sanae Takaichi assumed office as prime minister earlier this month.

The US Fed on Wednesday slashed the benchmark federal funds rate by 25 basis points, as expected, to bring it to 3.75%-4%.

The U.S. consumer price index (CPI) rose 0.3% in September, pushing the annual inflation rate to 3%, a 0.1 percentage point increase from August. Core CPI, excluding food and energy, rose 0.2% for the month and 3% annually, compared with 0.3% monthly gains in July and August.

(Source: Capitaline)

Outlook and Technical View

The Q2FY26 earnings to remain in focus. Investors will closely monitor crude oil prices, bond markets and further geopolitical developments. Domestic and global macroeconomic data, trend in global stock markets, the movement of rupee against the dollar and crude oil prices will also dictate trend on the bourses in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be monitored.

From the technical standpoint, Nifty may find support at 25694, 25553, 25395, 25237 while levels of 25881, 26039, 26124, 26209 may act as resistance with pivot point at 25820.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	25-Nov-25	25907.10	25952.00	-0.17%	185.00	676089	225366	200.00%
BANKNIFTY	25-Nov-25	58189.00	57999.00	0.33%	412.65	112763	56191	100.68%

(Source: [NSE](#))

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
DIVISLAB	6738.00	6789.50	25-Nov-25	11.16%
AUROPHARMA	1138.90	1147.60	25-Nov-25	11.15%
UPL	720.10	725.20	25-Nov-25	10.34%
LUPIN	1963.50	1977.40	25-Nov-25	10.34%
MANAPPURAM	269.50	271.40	25-Nov-25	10.29%
ICICIBANK	1345.30	1354.40	25-Nov-25	9.88%
BEL	426.10	428.95	25-Nov-25	9.77%
KOTAKBANK	2102.20	2116.20	25-Nov-25	9.72%
HDFCBANK	987.30	993.85	25-Nov-25	9.69%
NESTLEIND	1271.60	1280.00	25-Nov-25	9.64%

(Source: [NSE](#))

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
ASHOKLEY	141.53	137.87	25-Nov-25	-37.76%
PAGEIND	41200.00	40690.00	25-Nov-25	-18.07%
VOLTAS	1383.60	1368.20	25-Nov-25	-16.25%
POWERGRID	288.15	285.90	25-Nov-25	-11.40%
COLPAL	2243.00	2228.10	25-Nov-25	-9.70%
NTPC	336.95	335.45	25-Nov-25	-6.50%
HINDPETRO	476.00	473.90	25-Nov-25	-6.44%
PFC	403.25	401.70	25-Nov-25	-5.61%
IGL	211.94	211.20	25-Nov-25	-5.10%
BHARATFORG	1324.70	1320.20	25-Nov-25	-4.96%

(Source: [NSE](#))

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	44053125	39479250	1.12

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. WELCORP	2. JINDALSTEL	3. SAIL	4. JSWSTEEL	5. TATASTEEL
6. HINDALCO	7. NMDC	8. APLAPOLLO	9. M&M	10. BOSCHLTD
11. TVSMOTOR	12. BAJAJ-AUTO			

(Source: [Moneycontrol](#))

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