EQUITY WEEKLY REPORT

SHRIRAM Insight

HAR HAATH MEIN DHAN KI REKHA

08th November 2025

Market Snapshot

KEY INDICES	07-Nov-25	31-Oct-25	05-Sep-25
S&P CNX NIFTY	25492.30	25722.10	-0.89
SENSEX	83216.28	83938.71	-0.86
NIFTY MIDCAP 100	59843.15	59825.90	0.03
NIFTY SMLCAP 100	18075.95	18380.80	-1.66

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	07-Nov-25	31-Oct-25	%Ch
NIFTY BANK	57876.80	57776.35	0.17
NIFTY AUTO	26779.55	26809.85	-0.11
NIFTY FMCG	55437.20	56208.50	-1.37
NIFTY IT	35117.60	35712.35	-1.67
NIFTY METAL	10426.80	10612.15	-1.75
NIFTY PHARMA	22169.80	22175.40	-0.03
NIFTY REALTY	946.40	947.55	-0.12
BSE CG	69366.04	70404.39	-1.47
BSE CD	59969.13	60561.61	-0.98
BSE Oil & GAS	28653.45	28640.52	0.05
BSE POWER	6687.59	6925.65	-3.44

(Source: Investing.com)

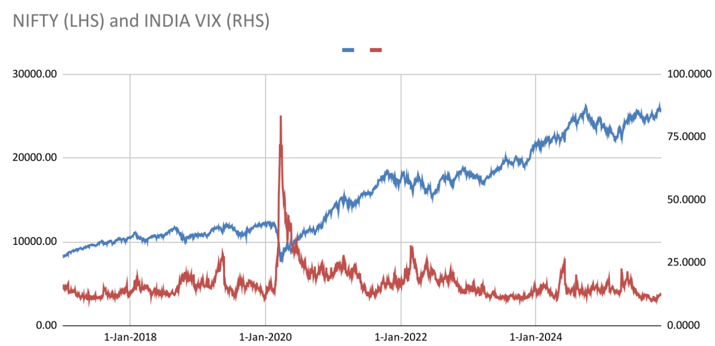
FII & DII Activities (Rs Crore)

31/10/2025 to 07/11/2025

Activities	FIIs	DIIs
Buy	65859.54	88877.77
Sell	80980.87	65131.39
Net	-15121.33	23746.38

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Sensex, Nifty slide amid mix earnings; Nifty closes below 25,500 level

The Indian equity market ended the week on a cautious note as profit-taking weighed on sentiment. Market movements were volatile, reflecting mixed corporate earnings and moderating economic growth. Manufacturing remained robust, while services growth eased slightly. Select stocks outperformed, but overall market sentiment remained cautious. Investors stayed alert ahead of upcoming macroeconomic cues and global developments.

In the week ended on Friday, 7 November 2025, the S&P BSE Sensex declined 722.43 points or 0.86% to settle at 83,216.28. The Nifty 50 index tanked 229.8 points or 0.89% to settle at 25,492.30. The BSE Mid-Cap index rose 0.25% to close at 46,768.39. The BSE Small-Cap fell 0.01% to end at 53,052.16.

The seasonally adjusted HSBC India Manufacturing Purchasing Managers' Index (PMI) was up from 57.7 in September to 59.2 in October, indicating a quicker improvement in the health of the sector. Manufacturing sector conditions in India continued to strengthen in

Sensex Gainers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
M&M	3691.60	3486.35	5.89
ASIANPAINT	2618.55	2510.00	4.32
BAFINANCE	1066.65	1042.60	2.31
SBIN	955.95	937.00	2.02
BAJAJFINSV	2104.25	2088.20	0.77

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
POWERGRID	272.00	288.15	-5.60
MARUTI	15478.10	16191.90	-4.41
ITC	404.00	420.25	-3.87
LT	3881.65	4031.20	-3.71
NTPC	326.15	336.85	-3.18

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
M&M	3690.20	3487.20	5.82
BRITANNIA	6157.50	5836.50	5.50
ASIANPAINT	2613.80	2510.80	4.10
UPL	747.95	720.10	3.87
BPCL	367.15	356.80	2.90

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
HINDALCO	790.40	847.85	-6.78
GRASIM	2724.60	2891.70	-5.78
POWERGRID	272.00	288.15	-5.60
HEROMOTOCO	5296.00	5544.00	-4.47
MARUTI	15479.00	16186.00	-4.37

(Source: Capitaline)

October, buoyed by GST (Goods and Services Tax) relief, productivity gains and tech investment.

India's services sector continued to expand in October, though at a slower pace, with the HSBC India Services PMI easing to 58.9 from 60.9 in September. Despite the moderation, the index remained well above the neutral 50 mark and its long-run average of 54.3, signalling strong business activity and sustained growth momentum in the services economy, albeit at the slowest pace since May.

Competitive pressures and heavy rains were cited as contributors to the sequential slowdown. Input costs notably increased at the slowest rate in 14 months, which provided some relief for firms.

India's overall business activity grew strongly in October, though at a slightly slower pace, with the HSBC India Composite PMI easing to 60.4 from 61.0 in September. The data signaled a continued sharp expansion in both manufacturing and services output, but marked the softest pace of growth since May.

Global Market:

China:

China's manufacturing activity softened in October, with RatingDog's Purchasing Managers' Index (PMI) easing to 50.6 — below expectations of 50.9 and down from 51.2 in September. Official data from the National Bureau of Statistics also pointed to a slowdown, with the manufacturing PMI slipping to 49.0, its lowest level in six months, indicating contraction in factory output.

China's exports fell 1.1% year-on-year in U.S. dollar terms in October, reversing sharply from an 8.3% surge in September, official data showed on Friday. Imports rose 1% YoY, easing from 7.4% growth in the previous month.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
LTF	303.60	270.49	**12.24**
IDEA	9.61	8.73	**10.08**
SHRIRAMFIN	816.35	748.90	**9.01**
ASTRAL	1557.30	1450.10	**7.39**
NAVINFLUORO	5969.00	5687.40	**4.95**

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	07-Nov-25	31-Oct-25	%Ch
DEVYANI	147.97	161.80	**-8.55**
DELHIVERY	429.55	465.95	**-7.81**
INDHOTEL	691.30	741.80	**-6.81**
GODREJPROP	2142.70	2288.00	**-6.35**
PFC	380.25	403.25	**-5.70**

(Source: Capitaline)

World Markets

KEY INDICES	07-Nov-25	31-Oct-25	%Ch
DJIA	46987.10	47562.87	**-1.21**
NASDAQ	23004.54	23724.96	**-3.04**
BOVESPA	154063.53	149540.00	**3.02**
FTSE 100	9682.57	9717.25	**-0.36**
CAC 40	7950.18	8121.07	**-2.10**
DAX	23569.96	23958.30	**-1.62**
MOEX RUSSIA	2566.42	2525.20	**1.63**
NIKKEI 225	50276.37	52411.34	**-4.07**
HANG SENG	26241.83	26183.46	**0.22**
STRAITS TIMES	4492.24	4428.62	**1.44**
SHANGHAI COMPOSITE	3997.56	3954.79	**1.08**
JAKARTA	8394.59	8163.88	**2.83**

(Source: Capitaline, Investing.com)

United states:

Private sector hiring in the US picked up modestly in October, with companies adding 42,000 jobs, according to ADP payroll data, following a decline of 29,000 in September. Revised figures showed 3,000 additional job losses for the prior month. Meanwhile, the ISM services index climbed to 52.4% in October from 50% in September, signaling continued expansion in the services sector.

Adding to investor unease, October layoffs surged to 153,000, nearly triple September's figure and 175% higher year-on-year, according to Challenger, Gray & Christmas.

The spike in job cuts, combined with the ongoing U.S. government shutdown, now over a month old, has further clouded the outlook for the U.S. economy.

(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 25452, 25357, 25221, 25124 while levels of 25590, 25687, 25823, 25982 may act as resistance with pivot point at 25454.

(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	25605.00	25907.10	**-1.17%**	**112.70**	741900	676089	**9.73%**
BANKNIFTY	25-Nov-25	58217.20	58189.00	**0.05%**	**340.40**	121140	112763	**7.43%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
GLENMARK	1811.50	1822.20	25-Nov-25	**11.98%**
MANAPPURAM	270.65	272.15	25-Nov-25	**11.24%**
MFSL	1618.10	1626.70	25-Nov-25	**10.78%**
HDFCBANK	982.30	987.45	25-Nov-25	**10.63%**
ADANIENT	2369.40	2381.10	25-Nov-25	**10.01%**
AXISBANK	1222.80	1228.80	25-Nov-25	**9.95%**
SAIL	141.00	141.69	25-Nov-25	**9.92%**
BANDHANBNK	153.71	154.46	25-Nov-25	**9.89%**
RBLBANK	328.25	329.85	25-Nov-25	**9.88%**
JSWSTEEL	1171.70	1177.40	25-Nov-25	**9.86%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
POWERGRID	272.00	268.35	25-Nov-25	**-27.21%**
INFY	1476.80	1460.30	25-Nov-25	**-22.66%**
VOLTAS	1321.50	1312.20	25-Nov-25	**-14.27%**
ASHOKLEY	141.28	140.48	25-Nov-25	**-11.48%**
BHARATFORG	1317.10	1312.10	25-Nov-25	**-7.70%**
IGL	212.00	211.35	25-Nov-25	**-6.22%**
NAUKRI	1345.40	1341.60	25-Nov-25	**-5.73%**
ONGC	252.20	251.50	25-Nov-25	**-5.63%**
DRREDDY	1205.40	1203.10	25-Nov-25	**-3.87%**
CHOLAFIN	1703.90	1701.10	25-Nov-25	**-3.33%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	45126675	47381025	**0.95**

(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. BANKBARODA	**2. AUBANK**	**3. CANBK**	**4. SBIN**	**5. ADANIGREEN**
6. POWERGRID	**7. ADANIPOWER**	**8. NHPC**	**9. ABB**	**10. SUZLON**
11. NTPC	**12. TATAPOWER**	**13. TORNTPOWER**		

(Source: Moneycontrol)

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