WEEKLY COMMENTARY

31st OCT 2026

Hem Securities
Building your wealth through values

BROKING | INVESTMENT BANKING | RESEARCH | DISTRIBUTION | DEPOSITORY | PMS

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	73,123.83	72,990.04	74,166.16	72,514.57	73,895.74	+771.91	+1.06
NIFTY 50	22,600.00	22,524.40	23,118.10	22,387.35	23,053.10	+453.10	+2.00

INDICES CLOSED THE WEEK ON A GREEN NOTE

Indian equity benchmark ended on a green note in the week ended 31 October, 2026. Key indices were positive in three out of five sessions of the week. The S&P BSE Sensex was up by 771.91 points or 1.06% to settle at 73,895.74 in the week ended 31 October, 2026. The Nifty was up by 453.10 points or 2.00% to settle at 23,053.10. The BSE 500 index was up by 1815.25 points or 5.41% to settle at 35353.29. The BSE Small-Cap index was up by 705.27 points or 10.95% to settle at 7145.92.

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
TRENT LTD	3017.3	2727.5	10.6
DR REDDY`S LAB	1352.0	1229.5	9.96
APOLLO HOSP	8448.0	7730.0	9.29
ADANI PORTS	1850.0	1702.7	8.65
ETERNAL LTD	343.65	317.40	8.27

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAM FIN	823.15	865.00	-4.84
COAL INDIA	389.00	397.45	-2.13
RELIANCE IND	1164.9	1190.0	-2.11
TCS LTD	2502.6	2530.0	-1.08
ONGC LTD	225.39	227.50	-0.93

MARKET STATS

Most Active (by value)

Name	Avg Value	Pr.	Qty
INFOSYS LTD	10522	1185.0	88798.05
HDFC BANK	10070	692.80	145358.58
RELIANCE IND	9099.9	1164.9	78118.17
BHARTI AIR	8808.9	1973.7	44631.58
ICICI BANK	7789.1	1398.0	55716.51

Most Active (by volume)

Name	Avg Value	Pr.	Qty
ETERNAL LTD	5182.2	343.65	150800.61
HDFC BANK	10070	692.80	145358.58
KOTAK BANK	6572.3	461.60	142381.94
WIPRO LTD	1939.6	198.31	97810.50
ITC LTD	2588.7	265.60	97468.65

INSTITUTIONAL NET POSITION

FIIs Cash	• +6,304.67
FIIs Index Future	• - 5,339.14
FIIs Stock Future	• + 8,900.76
DIIs Cash	• + 3,109.79

On Monday, 26 Oct, 2026, key benchmark indices ended with sharply higher. The S&P BSE Sensex advanced 482.92 points or 0.66% to 73,606.75. On Tuesday, 27 Oct, 2026, domestic equity indices ended lower. The S&P BSE Sensex declined 8.08 points or 0.01% to 73,598.67. On Wednesday, 28 Oct, 2026, equity indices declined again. The S&P BSE Sensex declined 352.64 points or 0.48% to 73,246.03. On Thursday, 29 Oct, 2026, key benchmark indices ended higher. The S&P BSE Sensex surged 905.01 points or 1.24% to 74,151.04. On Friday, 30 Oct, 2026, key equity indices again ended higher. The S&P BSE Sensex jumped 308.49 points or 0.42% to 74,459.93.

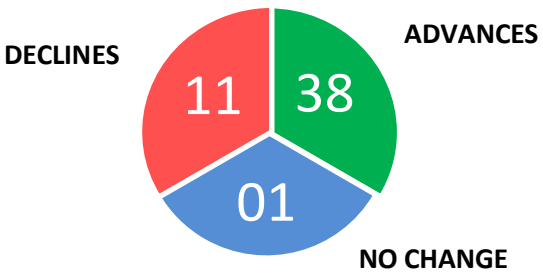
MARKET WATCH- LAST WEEK

Domestic benchmark indices ended the week higher, supported by strong gains in mid-cap and small-cap stocks, positive Q2 corporate earnings from companies such as Kotak Mahindra Bank, Mankind Pharma and Larsen & Toubro, and improved domestic sentiment. However, mixed earnings from Dr Reddy's Laboratories, Maruti Suzuki and Cipla, along with persistent global inflation concerns and hawkish signals from the US Federal Reserve, kept investors cautious.

MARKET WATCH- COMING WEEK

Indian equities are likely to remain cautious next week amid global inflation concerns, elevated crude oil prices, geopolitical developments and movements in foreign institutional investor flows. Investors will closely track India's October Manufacturing and Services PMI data, along with the Q2 FY27 earnings season, including results from SBI, ITC, Bajaj Finserv, Bharti Airtel, Titan Company, Mahindra & Mahindra and Hindalco Industries.

NIFTY MARKET BREADTH (W) - POSITIVE



RATIO ANALYSIS

PUT CALL RATIO	PE MULTIPLE OF NIFTY
1.42	19.30

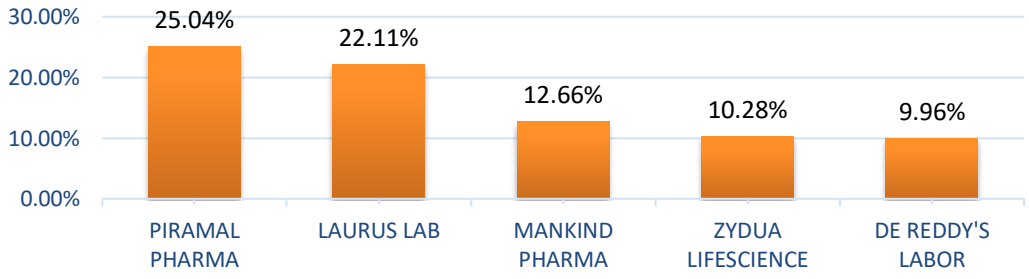
NEWS BULLETIN

- **Infosys** has expanded its Pocharam Development Center (DC) in Hyderabad, Telangana, with the inauguration of a new Software Development Block. The new 1.1 million sq. ft. facility further strengthens Infosys' presence in Telangana and its commitment to the region's growing technology and talent ecosystem.

- **Welspun Corp** has secured approval to invest up to $115 million towards debottlenecking and capacity augmentation, and setting up of an additional Spiral (HSAW) Pipe facility at its existing location at Little Rock, Arkansas, USA. The

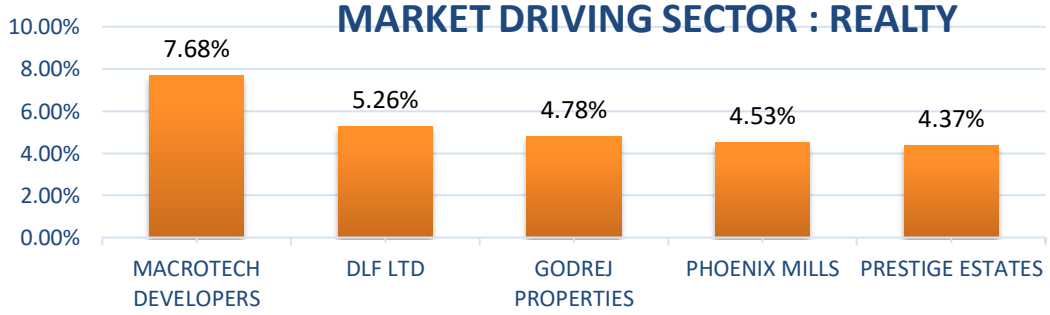
- **RailTel Corporation of India** has received the purchase order worth around Rs 20.04 crore (excluding tax) from The Pune District Central Co-Operative Bank. The purchase order is for the supply, installation and maintenance of integrated surveillance system and buy back of existing CCTV inventory. The order is to be executed by October 30, 2031

MARKET DRIVING SECTOR : PHARMA



NIFTY PHARMA
CLOSING: 27,124.85
CHANGE: +1,795.40
CHANGE: +7.09%

MARKET DRIVING SECTOR : REALTY



NIFTY REALTY
CLOSING: 813.90
CHANGE: +29.55
CHANGE: +3.77%

For Disclosure & Disclaimer, click here