WEEKLY COMMENTARY

01th Nov 2025

Hem Securities
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Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	84,211.88	84,297.39	85,105.83	83,905.66	83,938.71	- 273.17	- 0.32
NIFTY 50	25,795.15	25,843.20	26,097.85	25,711.20	25,722.10	- 73.05	- 0.28

INDICES CLOSED THE WEEK WITH MINOR LOSS

Indian equity benchmark ended on a red note in the week ended 31th Oct, 2025. Key indices were positive in two out of five sessions of the week. The S&P BSE Sensex was down by 273.17 points or 0.32% to settle at 83,938.17 in the week ended 01th Nov, 2025. The CNX Nifty was down by 73.05 points or 0.28% to settle at 25,722.10. The BSE Mid-Cap index was up by 449.63 or 0.96% to settle at 47,044.59. The BSE Small-Cap index was up by 359.34 points or 0.67% to settle at 53,876.14.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SBI LIFE	1,955.70	1,839.80	6.30
JSW STEEL	1,206.00	1,141.40	5.66
TATA STEEL	182.84	174.44	4.82
SHRIRAM FINANCE	748.90	715.45	4.68
SBIN	937.00	904.50	3.59

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
DR REDDY`S LAB	1,197.60	183.60	-6.70
CIPLA LTD	1,501.30	1,584.40	-5.24
BAJAJ FINANCE	1,042.80	1,089.75	-4.31
KOTAK BANK	2,102.20	2,187.00	-3.88
M&M	3,487.20	3,625.00	-3.80

Most Active (by value)

Name	Avg Value	Pr.	Qty
TATA STEEL	3,204.58	182.84	17,52,671.04
ETERNAL LTD	4,135.44	317.75	13,01,476.16
HDFC BANK	10,915.47	987.30	11,05,587.84
BEL	4,321.51	426.10	10,14,201.92
ICICI BANK	10,676.08	1,345.30	7,93,583.36

Most Active (by volume)

Name	Avg Value	Pr.	Qty
HDFC BANK	10,915.47	987.30	11,05,587.84
ICICI BANK	10,676.08	1,345.30	7,93,583.36
RELIANCE	9,172.11	1,486.40	6,17,069.04
SBIN	6,432.88	937.00	6,86,539.92
LT	5,764.48	4,030.90	1,43,007.18

INSTITUTIONAL NET POSITION

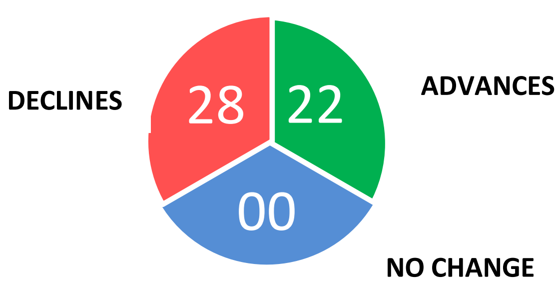
FIIs Cash	- 2,102.87
FIIs Index Future	- 8,835.21
FIIs Stock Future	+ 2,153.17
DIIs Cash	+ 18,804.26

On Monday, 27 Oct, 2025, Indian equity benchmarks held gaining momentum till the end of the session on Monday. On Tuesday, 28 Oct, 2025, In volatile trading session, Indian equity benchmarks ended with marginal losses on Tuesday on account of recovery in last leg of trade. On Wednesday, 29 Oct, 2025, Indian equity benchmarks ended in positive territory on Wednesday, with the Nifty closing above the 26,000 mark and the Sensex finishing around the 85,000 level, supported by broad-based buying across sectors and strong inflows from foreign investors. On Thursday, 30 Oct, 2025, Indian equity benchmarks ended sharply lower, as all sectoral indices finished in the red. On Friday, 31 Oct 2025, The S&P BSE Sensex was down by 465.75 points or 0.55% to 83,938.71.

Company Name	Quantity	Trade Price
Chennai Petroleum	12,52,324	942.78
Sammaan Capital	68,10,079	187.86
Strides Pharma	5,78,738	937.22
G M Breweries	1,97,309	1275.89
Reliance Industries	2,95,600	1475.50
Netweb Technologies	3,08,208	4095.43
Sagility	2,79,22,520	55.11

BULK & BLOCK

NIFTY MARKET BREADTH (W) - NEGATIVE

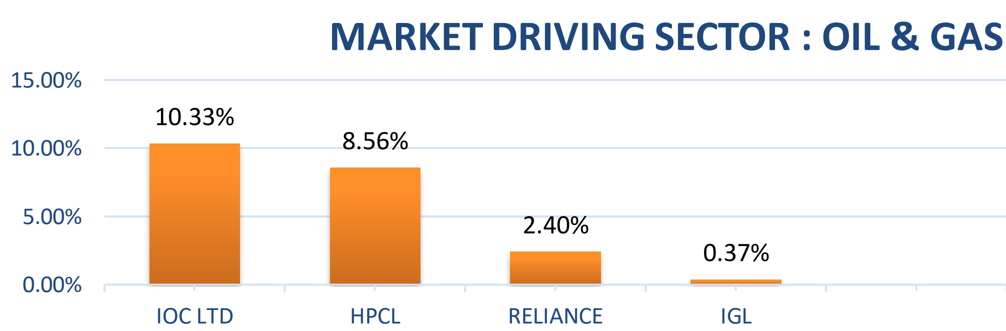


RATIO ANALYSIS

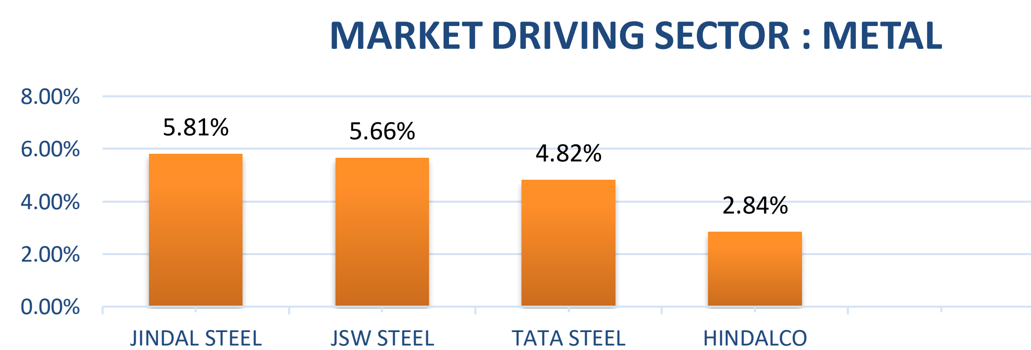
PUT CALL RATIO	PE MULTIPLE OF NIFTY
0.64	22.64

NEWS BULLETIN

- **United Drilling Tools** has received export order from Venezuela by M/s Union Venezuela Servicios, C.A. for the supply of Gas Lift Equipments in the ordinary course of business. Broad consideration or size of the order is Rs 1.27 crore and is to be executed within 3 months.
- **Bharat Electronics** has reported 17.86% rise in its net profit at Rs 1,286.13 crore for the second quarter ended September 30, 2025 as compared to Rs 1,091.27 crore for the same quarter in the previous year. Total income of the company increased by 24.68% at Rs 5,922.75 crore for Q2FY26 as compared to Rs 4,750.24 crore for the corresponding quarter previous year.
- **DLF** has reported over five-fold jump in its net profit at Rs 1013.45 crore for the quarter ended September 30, 2025 as compared to Rs 192.36 crore for the same quarter in the previous year. The total income of the company increased by 45.33% at Rs 1,581.28 crore for Q2FY26 as compared to Rs 1,088.06 crore for the corresponding quarter previous year.
- **United Spirits** has reported 40.90% jump in its net profit at Rs 472.00 crore for second quarter ended September 30, 2025 as compared to Rs 335.00 crore for the same quarter in the previous year.



NIFTY OIL & GAS
CLOSING: 11,990.25
CHANGE: + 366.20
CHANGE: + 3.15%



NIFTY METAL
CLOSING: 10,612.15
CHANGE: + 264.70
CHANGE: + 2.56

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