WEEKLY COMMENTARY

8th Nov 2025

Hem Securities
Building your wealth through values

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

Index	Previous Close	Open	High	Low	Close	Change	Change%
SENSEX	83938.71	83835.10	84127.00	82670.95	83216.28	-722.43	-0.86
NIFTY 50	25722.10	25696.85	25803.10	25318.45	25492.30	-229.80	-0.89

INDICES SHUT THE WEEK ON A NEGATIVE NOTE

Indian equity benchmark ended on a red note in the week ended 8TH Nov, 2025. Key indices were positive in two out of four sessions of the week. The S&P BSE Sensex was down by 722.43 points or 0.86% to settle at 83,216.28 in the week ended 8th Nov, 2025. The CNX Nifty was down by 229.80 points or 0.89% to settle at 25,492.30. The BSE Mid-Cap index was down by 276.20 or 0.58% to settle at 46,768.39. The BSE Small-Cap index was down by 823.98 points or 1.52% to settle at 53,052.16.

MARKET STATS

Top Gainers

Name	Closing Pr.	Previous Pr.	%Ch
SHRIRAM FINANCE	816.35	748.90	9.01
M&M	3690.2	3487.2	5.82
ASIAN PAINTS	2613.8	2510.8	4.10
HDFCLIFE INSURANC	749.25	731.85	2.38
BAJAJ FINANCE	1066.6	1042.8	2.28

Top Losers

Name	Closing Pr.	Previous Pr.	%Ch
HINDALCO INDUSTR	790.40	847.85	-6.78
DR REDDY`S LAB	1197.6	1283.6	-6.70
GRASIM INDUSTRIE	2724.6	2891.7	-5.78
POWER GRID CORP	272.00	288.15	-5.60
CIPLA LTD	1501.3	1584.4	-5.24

Most Active (by value)

Name	Avg Value	Pr.	Qty
BHARTI AIRTEL	19047.7	2001.2	95181.76
ICICI BANK	7819.4	1343.0	58223.73
HDFC BANK	7260.7	982.30	73915.81
SBI BANK	6438.4	955.85	67358.67
RELIANCE IND	6363.4	1478.0	43054.33

Most Active (by volume)

Name	Avg Value	Pr.	Qty
BHARTI AIRTEL	19047.7	2001.2	95181.76
TATA STEEL	1418.8	181.37	78229.02
HDFC BANK	7260.7	982.30	73915.81
POWERGRID	1848.9	272.00	67975.56
SBI BANK	6438.4	955.85	67358.67

INSTITUTIONAL NET POSITION

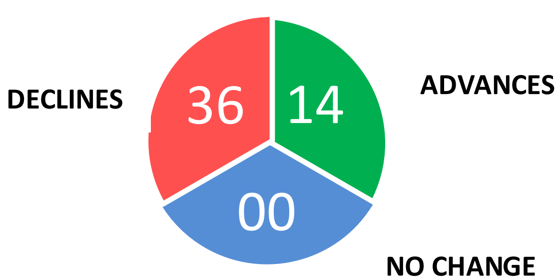
FIIs Cash	-1,632.66
FIIs Index Future	-6,451.74
FIIs Stock Future	-6,451.74
DIIs Cash	11,177.37

On Monday, 3 Nov 2025, Markets made a negative start and altered between red and green amid concerns over continued foreign fund outflows. On Tuesday, 4 Nov, 2025, The key equity indices traded with moderate losses in the mid-morning trade as investors entered into profit booking, overshadowing positive global cues. On Wednesday, 5 Nov, 2025, the markets were closed on the occasion of Guru Nanak Jayanti. On Thursday, 6 Nov, 2025, markets erased initial gains and traded near neutral lines amid selling pressure from foreign investors. On Friday, 7 Nov 2025, Sensex was down by 94.73 points or 0.11% to settle at 83,216.28.

BULK & BLOCK

Company Name	Quantity	Trade Price
Bharti Airtel	51,000,000	2030.37
Cyient	944,693	1101.23
BSE	2,528,540	2606.70
Netweb Technologies	353,764	3446.93
DAM Capital Advisors	830,094	271.57
Amber Enterprises	304,640	6992.95
BLS E-Services	578,465	200.56

NIFTY MARKET BREADTH (W) - NEGATIVE



RATIO ANALYSIS

PUT CALL RATIO
0.93

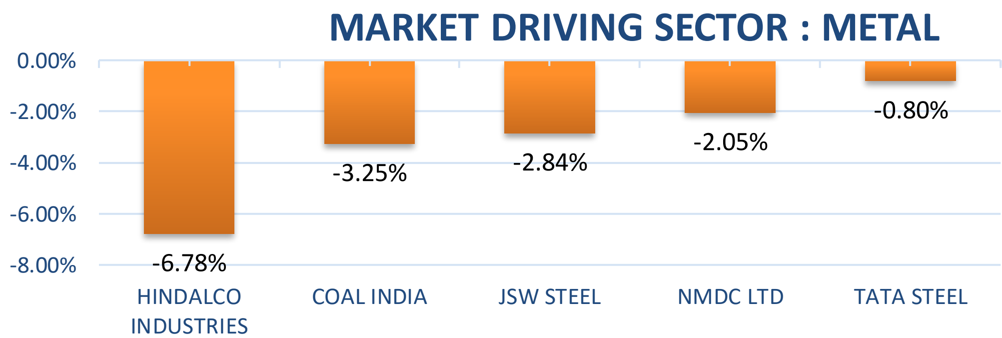
PE MULTIPLE OF NIFTY
22.09

NEWS BULLETIN

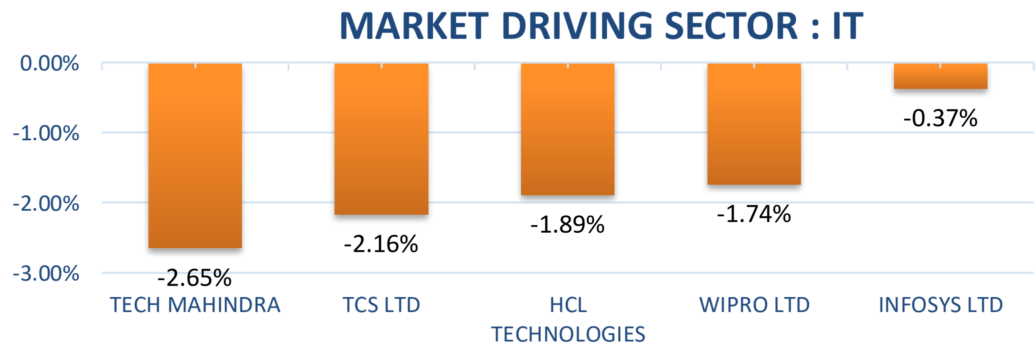
- **Waaree Energies' wholly owned subsidiary --** Waaree Power (WPPL) has acquired 76% stake in Racemosa Energy (India) for an aggregate consideration of Rs 53.20 crore. Consequently, Racemosa Energy (India) has become step-down subsidiary of the company effective from November 07, 2025..

- **Ashoka Buildcon** has received Letter of Acceptance (LoA) from The President of India Acting through the CEE/Project/NWR, North Western Railway, Ajmer for the Project of Up-gradation of existing Electric traction system from 1 x 25 kV to 2 x25 kV along with modification of existing OHE for 160 kmph few Sections of Ajmer Division of North Western Railway. The accepted project cost is Rs 539.35 crore incl. GST.

- **Adani Enterprises (AEL)** has incorporated a wholly owned subsidiary (WOS) namely 'Brahmani Barrage Water' (BBWL) in India on November 5, 2025 to carry out the construction of Brahmani Barrage across the Brahmani River with its Operation and Maintenance (O&M) near Shripura, Tehsil Rawatbhata, District Chittorgarh, Rajasthan under Hybrid Annuity Model. AEL shall hold 100% share capital of BBWL.



NIFTY METAL
CLOSING: 10426.79
CHANGE: -185.35
CHANGE: -1.74%



NIFTY IT
CLOSING: 35117.60
CHANGE: -594.75
CHANGE: -1.66%

[For Disclosure & Disclaimer, click here]