

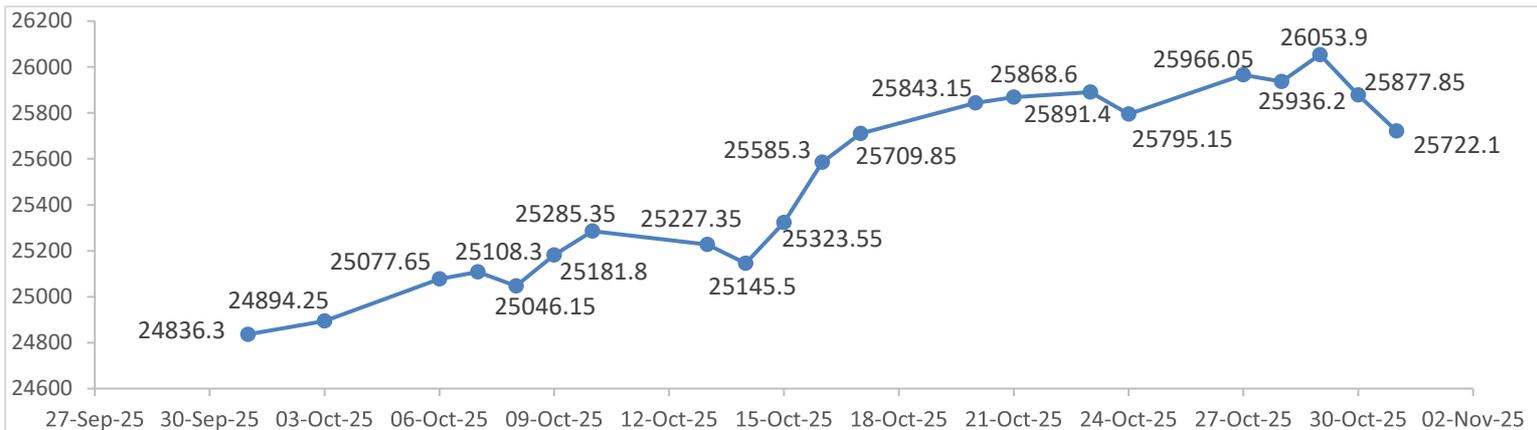
### Nifty 50

25,722.10 +1,111  
(+4.51%)

52 Week High: 26,104.2

52 Week Low: 21,743.6

Resistance		Support	
R1	26,049.75	S1	24,905.09
R2	26,403.34	S2	24,551.50
R3	26,975.67	S3	23,979.17



Sectorial Indices	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
Nifty Auto	26,542	26,809	1.01%
Nifty PSU Bank	7,526	8,184	8.74%
Nifty Pharma	21,454	22,175	3.36%
Nifty IT	33,655	35,712	6.11%
Nifty FMCG	54,710	56,208	2.74%
Nifty Metal	9,285	9,154	-1.41%
Nifty Fin Serv	26,022	27,138	4.29%
Nifty Cons	37,114	38,615	4.04%

Global Indices	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
Dow Jones	46,397	47,562	2.51%
Nasdaq	22,660	23,724	4.70%
FTSE	9,350	9,717	3.93%
Hang Seng	26,855	26,282	-2.93%
USD/INR	88.84	88.78	-0.07%
GBP/INR	119.47	116.78	-2.25%

Net Flow	Amount (Rs Cr)
FII	-2,346.89
DII	52,749.03
MF Equity	24,690
MF Debt	1,59,958

Index	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
SENSEX	80,267	83,938	4.57%
NIFTY 50	24,611	25,722	4.51%
BANK NIFTY	54,635	57,776	5.75%

Top Gainers	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
SHRIRAMFIN	616.1	748.9	21.55%
HCLTECH	1385.1	1541.5	11.29%
HINDALCO	761.95	847.85	11.27%
SBILIFE	1790.6	1955.7	9.22%
SBIN	872.45	937	7.4%

Top Losers	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
HDFCLIFE	756.45	731.85	-3.25%
DRREDDY	1223.7	1197.6	-2.13%
ETERNAL	325.5	317.75	-2.38%
ULTRACEMCO	12,222	11,947	-2.25%
HINDUNILVR	2514.4	2465.5	-1.94%

\*Nifty 500 constraint

Commodities	Prev. Close (30-Sep '25)	Close (31-Oct '25)	% Change (1M)
Gold	1,17,265	1,12,232	-4.29%
Silver	1,42,145	1,48,287	4.32%
Crude (WTI)	62.37	60.98	-2.23%

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## Indian Markets Log Strongest Monthly Gain in Seven Months in October:

Indian equity markets recorded their strongest monthly performance in seven months during October, driven by solid corporate earnings and attractive valuations. The Nifty 50 rose 4.5% and the BSE Sensex gained 4.6%, ending just over 2% below their September 2024 highs. After three months of outflows, FPIs turned net buyers, investing ₹14,610 crore. Precious metals remained volatile amid a stronger US dollar and rising bond yields despite a Fed rate cut. Markets will track trade talks, earnings trends, and growth prospects in FY25.

## Asian Markets Drive Global Equity Rally in 2025:

Global equities have shown strong resilience in 2025, with major indices across North America, Europe, and Asia delivering double-digit gains year-to-date. Asian markets have led the rally, outperforming global peers. The Hang Seng Index surged 33.9%, followed by Japan's Nikkei 225 up 30.5% and China's Shanghai Composite gaining 22.2%. In China and Hong Kong, policy support and a recovery in technology and consumer sectors boosted sentiment. Japan's strong performance was supported by corporate governance reforms, a favorable export environment, and healthy earnings growth, reinforcing Asia's leadership in global equity markets.

## US Technology Stocks Anchor Global Equity Strength in 2025:

In the United States, technology stocks continued to lead performance, driving overall market returns. The NASDAQ 100 climbed 24.5%, supported by strong momentum in artificial intelligence, cloud computing, and semiconductors. The S&P 500 rose 17.5%, while the Dow Jones Industrial Average gained 12.3%. However, market participation has been narrow, with gains concentrated in megacap technology leaders, raising concerns around valuations and the sustainability of the rally going forward.

## Equity Mutual Funds Rally in October as Gold Futures Hit Historic Highs:

Indian equity mutual funds delivered a strong performance in October, with several schemes generating returns of up to 9%. Sectoral and thematic funds, particularly those focused on technology and global equities, outperformed broader markets, supported by optimism around digital transformation and earnings visibility. Meanwhile, gold futures witnessed heightened activity, with prices briefly crossing the historic \$4,000 per ounce mark earlier in the month. The surge was driven by safe-haven demand, geopolitical uncertainties, and expectations of easier global monetary policy, reinforcing gold's role as a portfolio hedge.

## IPO Update :-

Company Name	IPO Date (October'25)	Market Response
Rubicon Research	09 Oct – 13 Oct	37.40x oversubscribed
Orkla India	29 Oct – 31 Oct	7.06x oversubscribed
LG Electronics	07 Oct – 09 Oct	3.55x oversubscribed

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