

Weekly Market Report

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Week of November 10 – November 14, 2025

Bulls Resurface as Inflation Collapses to Record Low

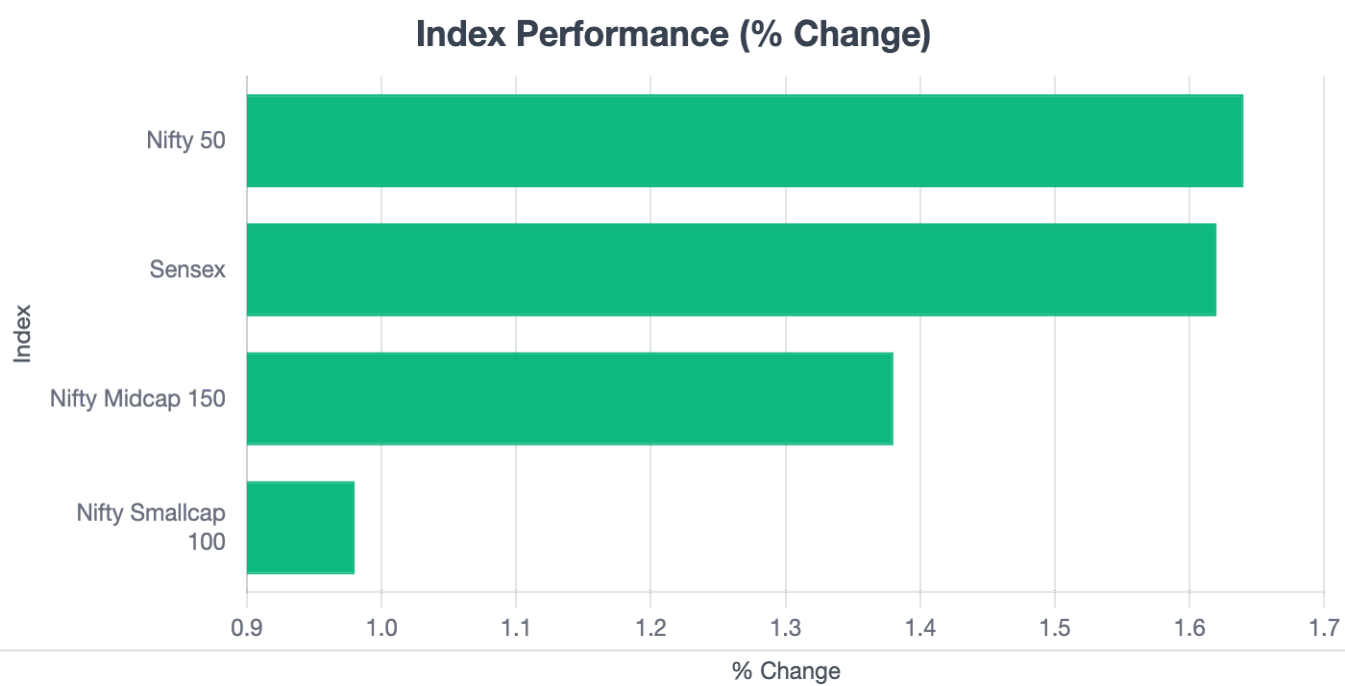
The Indian equity market staged a decisive rebound during the week, snapping a two-week losing streak. Supported by a profoundly positive shift in the domestic inflation outlook and a clearing of global headwinds, benchmark indices reclaimed key technical levels.

The rally was built on four key pillars: a historic collapse in CPI inflation to 0.25%, a successful technical bounce from the 50-day EMA, the resolution of the U.S. government shutdown, and record buying from DIIs that overwhelmed FII selling. Sectoral leadership rotated to defensive and rate-sensitive sectors like IT and Pharma.

Key Index Performance (Week-on-Week Analysis)

INDEX	PREVIOUS WEEK CLOSE	14 NOV CLOSE	ABSOLUTE CHANGE	% CHANGE	DIRECTION
Nifty 50	25492.30	25910.05	+417.75	+1.64%	Up
Nifty Midcap 150	22026.40	22331.25	+304.85	+1.38%	Up
Nifty Smallcap 100	18075.95	18252.50	+176.55	+0.98%	Up
BSE Sensex	83216.28	84562.78	+1346.50	+1.62%	Up

Index Performance (% Change)



Key Domestic & Global Events

The Inflation Milestone: CPI Collapses to 0.25%

India's headline CPI inflation for October fell to a record low of 0.25%, far below consensus. This has decisively shifted expectations, with markets now fully pricing in an RBI repo rate cut in December.

U.S. Government Shutdown Ends

The resolution of the record 43-day U.S. government shutdown was a crucial global catalyst, restoring "risk-on" sentiment and removing a major source of policy uncertainty for global markets.

The Great Divergence: DIIs Absorb FII Outflows

A historic "tug-of-war" saw FIIs sell -₹12,019 Cr, which was completely absorbed by a massive + ₹24,674 Cr inflow from DIIs, demonstrating the rising power and confidence of domestic capital.

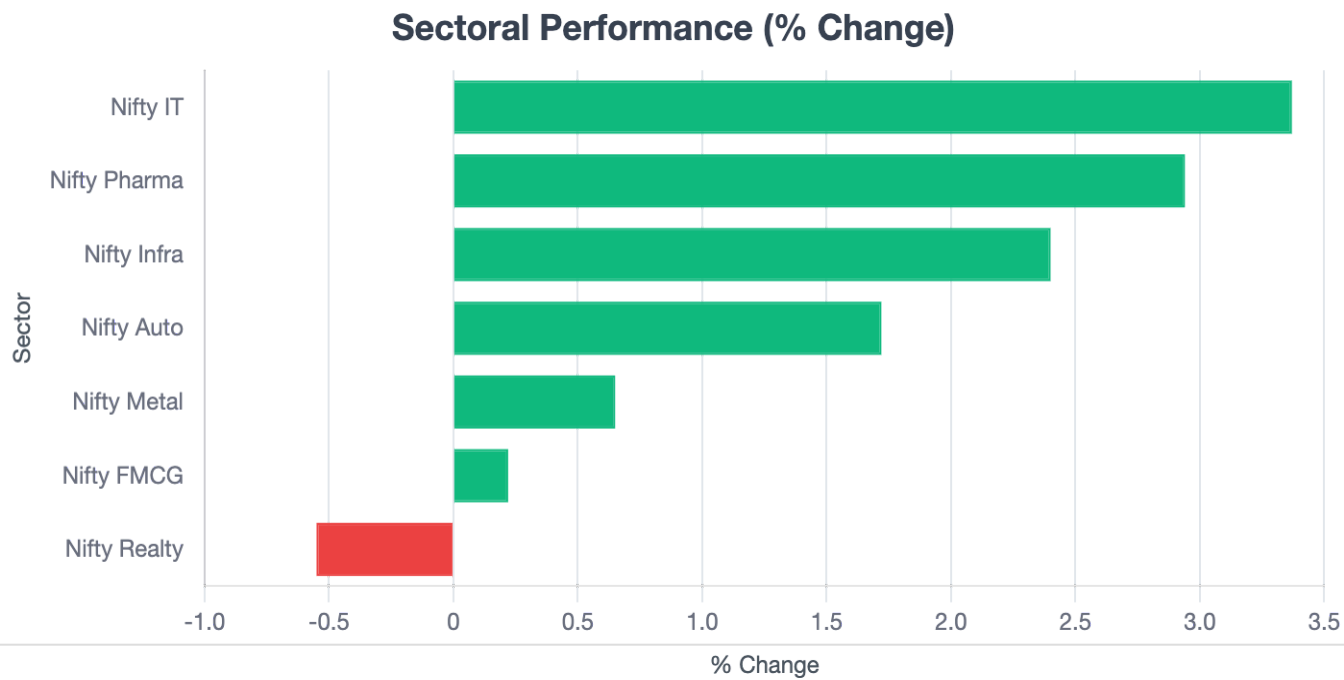
U.S. Fed Rate Cut Hopes

Growing optimism for a U.S. Fed rate cut, based on cooling labor market data, de-risked the earnings outlook for Indian IT companies and was the primary driver for the Nifty IT index's 3.37% surge.

Sectoral Performance Review

SECTOR	WEEKLY % CHANGE	KEY DRIVER
Nifty IT	+3.37%	The week's star, surging as U.S. Fed rate cut hopes and the end of the U.S. shutdown improved the client spending outlook.
Nifty Pharma	+2.94%	A defensive leader, rallying on a flight to quality and a potential new tailwind from the revival of the U.S. Biosecure Act.
Nifty Infra	+2.40%	Showed robust outperformance, underlining the market's strong belief in the domestic capex theme.
Nifty Auto	+1.72%	Reacted positively to the collapse in domestic CPI, which promises lower financing costs and a boost to consumer sentiment.
Nifty FMCG	+0.22%	The worst-performing gainer, as fears of a rural income slowdown (due to food deflation) offset input cost benefits.
Nifty Realty	-0.55%	The only sector in the red, driven by healthy profit-booking after a stellar, multi-month rally.

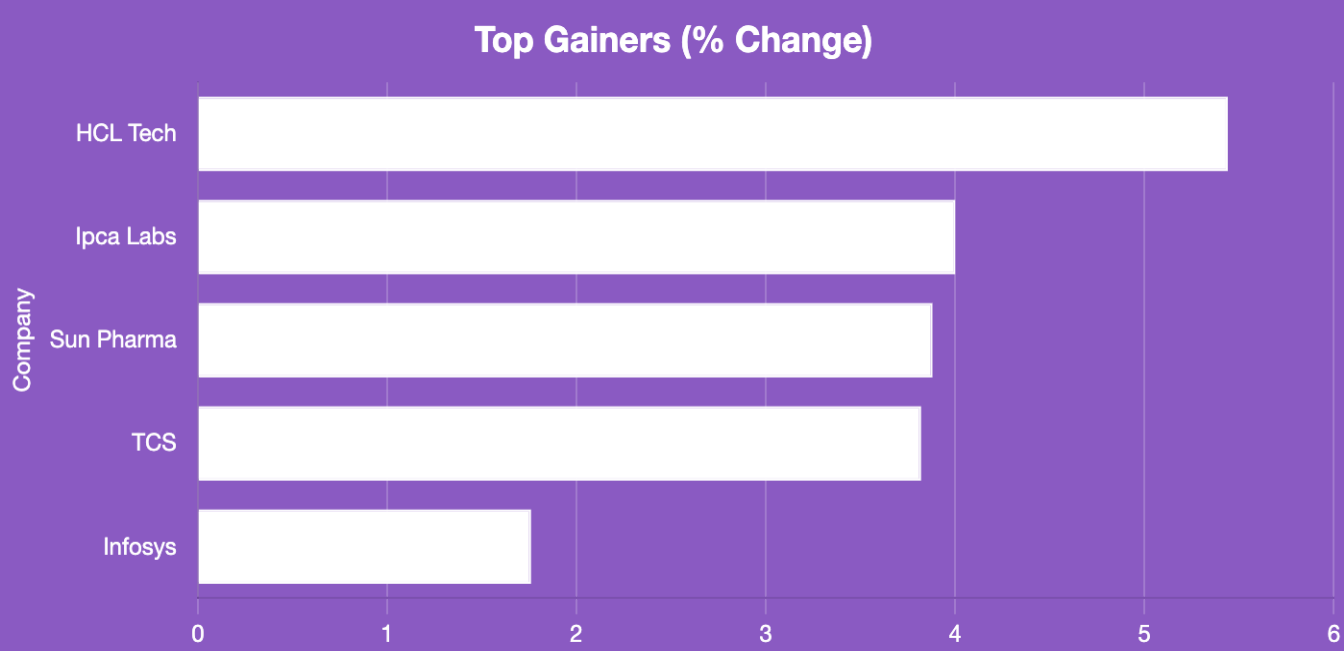
Sectoral Performance (% Change)



Weekly Top Gainers (Large Cap)

COMPANY
HCL Technologies
Sun Pharmaceutical
Tata Consultancy Services
Ipca Laboratories
Infosys

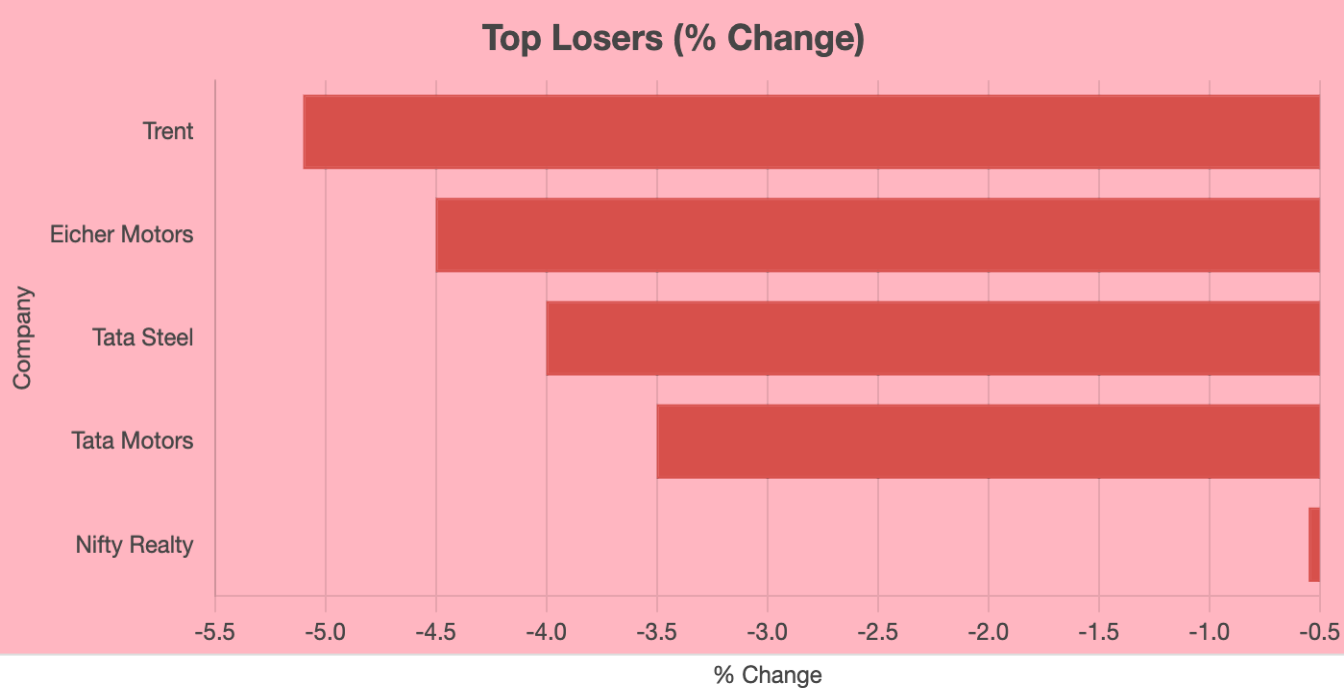
Top Gainers (% Change)



Weekly Top Losers (Large Cap)

COMPANY
Trent Ltd.
Eicher Motors
Tata Steel
Tata Motors
Nifty Realty Stocks

Top Losers (% Change)



Outlook for the Coming Week (November 17 - 21, 2025)

The market has successfully navigated a major macro-data week, a technical test, and a significant FII/DII rotation, demonstrating clear underlying strength. The bias for the coming week remains "sideways to bullish," with the market likely to consolidate its gains.

- **Technical Outlook:** The Nifty 50's rebound from its 50-day EMA is constructive. Immediate support is at 25,800-25,700, with key resistance at 26,000-26,100, which is fortified by high Call OI.
- **FII/DII Flow Dynamics:** This remains the most critical factor. The market's resilience depends on DIIs continuing their strong buying to absorb FII selling. Any slowdown in this "wall of domestic money" could be a risk.
- **Heavy Corporate Actions:** The week is packed with 48 companies, including Asian Paints and Adani Enterprises, having record dates for dividends and bonuses, which will induce stock-specific volatility.
- **Global Macro Data:** Markets will be on high alert for the delayed U.S. inflation data. Any further commentary from Fed officials will also be closely scrutinized as it directly impacts the Nifty IT sector.

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