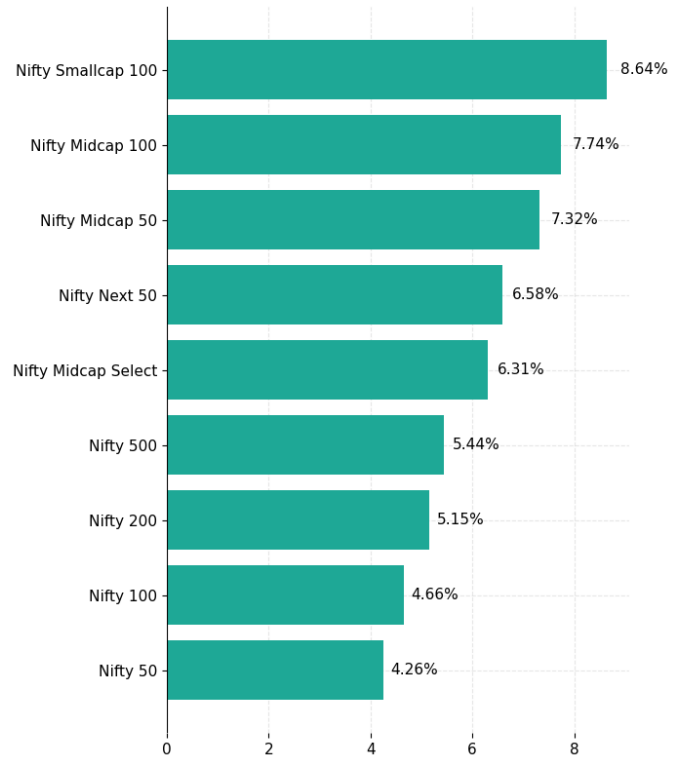


Indices Performance

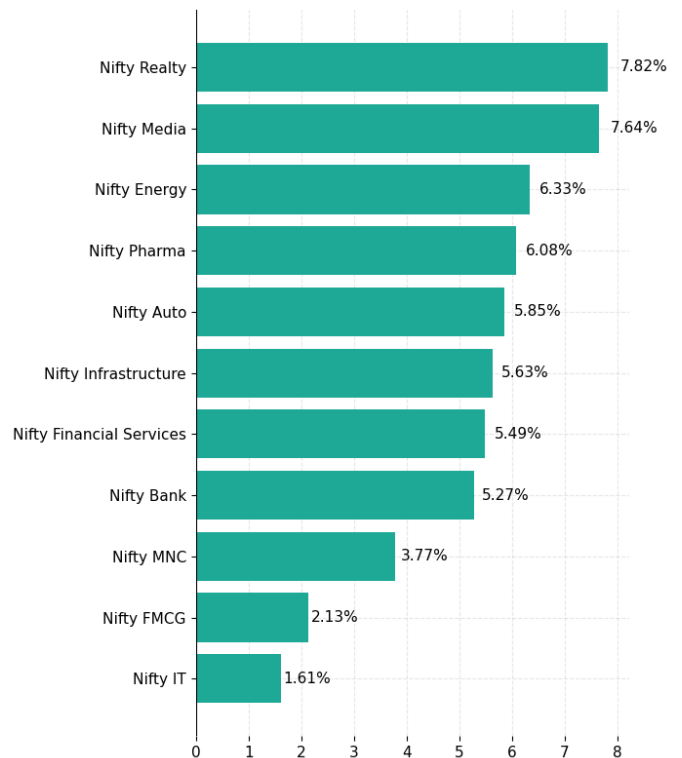
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 4.26% this week. The Realty, Media, and Energy sectors contributed significantly to the index rise.
- Nifty 100 registered a 4.66% positive return this week. The top gainers in the index were ADANIGREEN, HAL, and LODHA.
- Nifty Next 50 registered a positive return of 6.58% this week. GAIL, ZOMATO, and BHEL were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 6.31% and 7.32%, respectively. The top contributors to the midcap index were INDHOTEL, BHARARTFORG, and AUROPHARMA.
- The Nifty Smallcap 100 index posted a positive return of 8.64% this week, led by GRSE, KEC, and RKFORGE.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 48:2, significantly up from last week's ADR of 14:36.



Source: NSE, INVES 21 Research

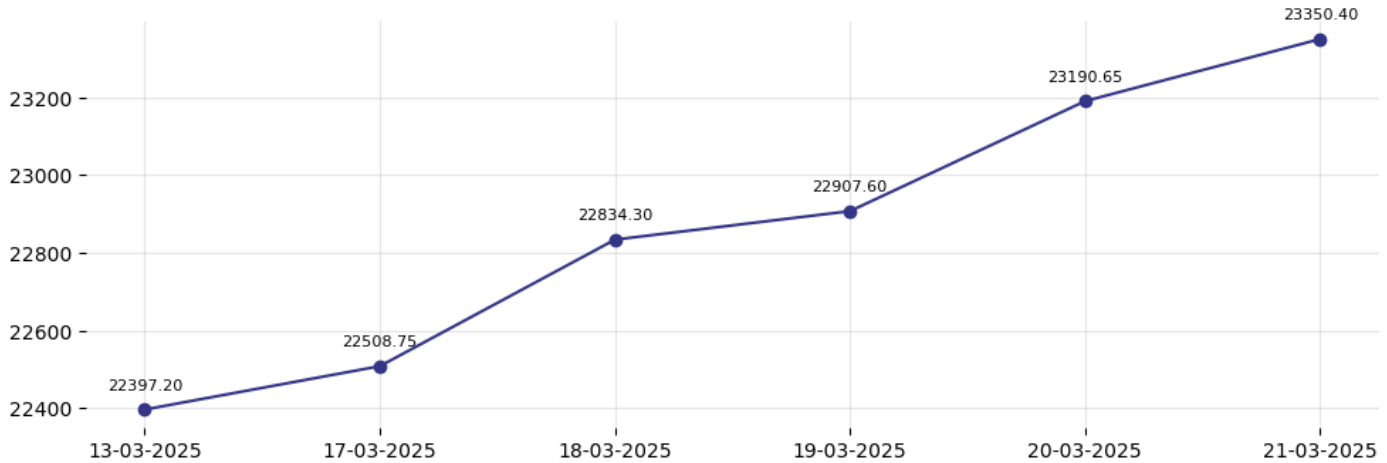
Sectoral Performance

- This week, all major sectoral indices posted a positive return.
- Nifty Realty registered a positive return of 7.82%. RAYMOND, LODHA, and PRESTIGE led to positive returns in the index.
- Nifty Media posted a positive return of 7.64% this week. SUNTV, TIPSMUSIC, and NETWORK18 were major contributors to the index.
- Nifty Pharma registered a positive return of 6.08%, led by MANKIND, AJANTPHARM, and GLENMARK.
- Nifty Auto posted a positive return of 5.85% this week. The major contributors to the index were TATAMOTORS, BHARATFORG, and MOTHERSON.
- Nifty Bank posted a positive return of 5.27% this week. ICICIBANK, KOTAKBANK, and CANBK were the top gainers in the index.
- Nifty IT posted a positive return this week; the index was up by 1.61%. MPHASIS, COFORGE, and PERSISTENT were the top gainers in the index.



Source: NSE, INVES 21 Research

Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an outflow of ₹5,819.12 crore this week. The week ending Mar 15 saw an outflow of ₹-5,729.68 crore. DII showed a net buying of ₹10,742.35 crore this week. DIIs had a net buying of ₹5,499.47 crore last week.

Participant	Amount (Cr.)
FII	5,819.12
DII	10,742.35

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's goods trade deficit dropped to a 42-month low of \$14.05 billion in February 2025, down from \$22.9 billion in January 2025 and \$19.5 billion in February 2024. According to the Ministry of Commerce and Industry, the decline was mainly due to reduced imports of gold, silver, and crude oil. Gold and silver imports fell to \$2.7 billion, the lowest since June 2024, while crude and petroleum imports dropped to \$11.89 billion, the lowest since July 2023. Overall imports hit a 22-month low of \$50.9 billion, while exports stood at \$36.9 billion. Year-on-year, exports declined by 10.84% in February 2025, partly due to the base year effect of the leap month. Imports fell by a steeper 16.3%. The average trade deficit over the first 10 months of FY2025 was over \$23 billion, significantly higher than February's figure.

Banking system credit in India grew by 11.1% year-on-year in the fortnight ending March 7, while deposits increased by 10.2% during the same period, according to RBI data. On an absolute basis, deposits expanded by ₹2.25 trillion over the previous fortnight, while credit rose by ₹1.38 trillion. As of March 7, total outstanding deposits stood at ₹181.28 trillion, while outstanding credit reached ₹225.10 trillion.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
21,985.9	22,668.1	23,035.4	23,717.7	24,085.0

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
SBILIFE	11.61%
HDFCLIFE	9.19%
DRREDDY	8.32%
APOLLOHOSP	8.29%
ONGC	7.54%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TECHM	-2.18%
ITC	-1.58%
-	-
-	-
-	-

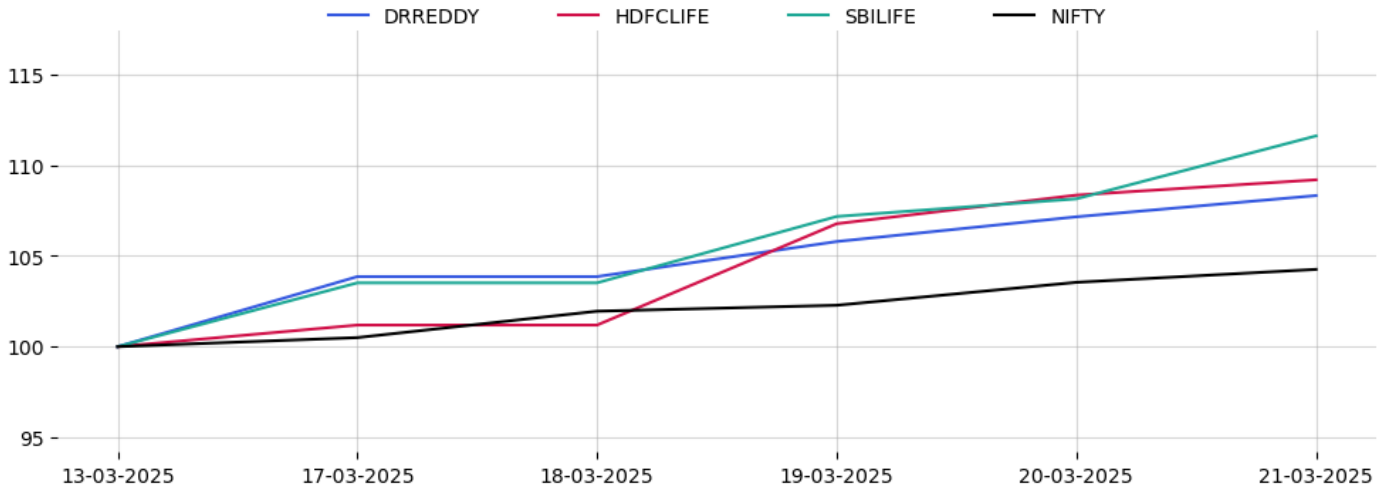
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	3,98,97,864
BEL	2,37,70,737
ICICIBANK	1,69,92,560

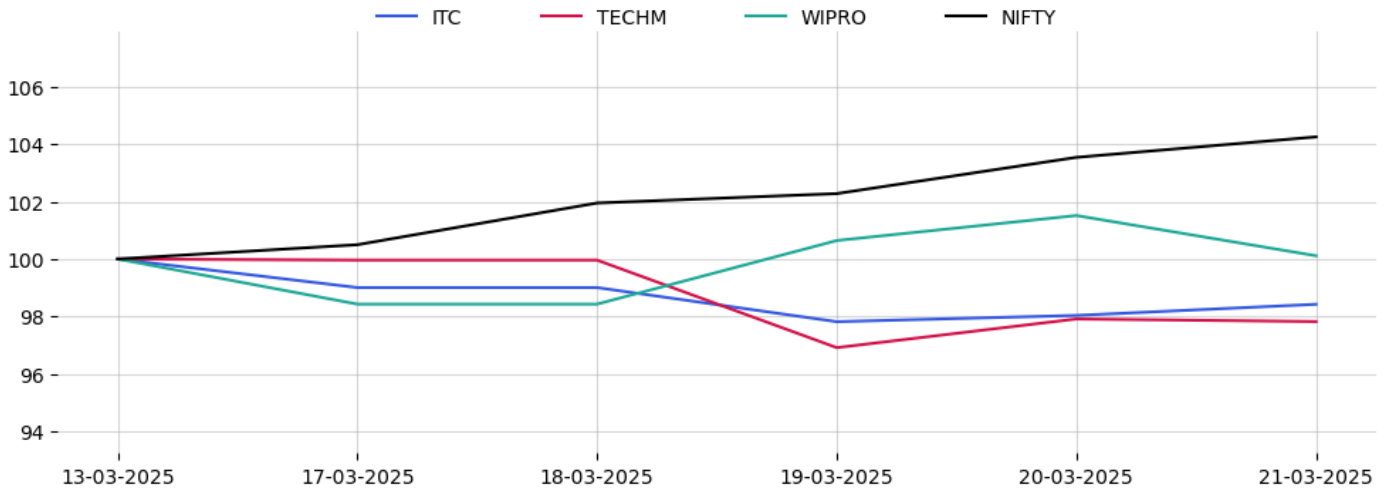
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



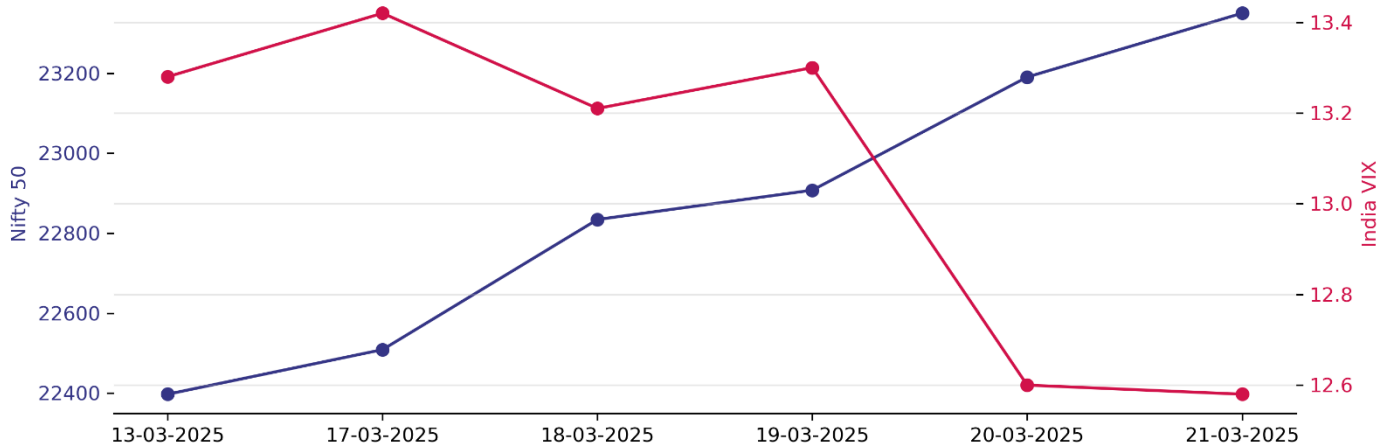
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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