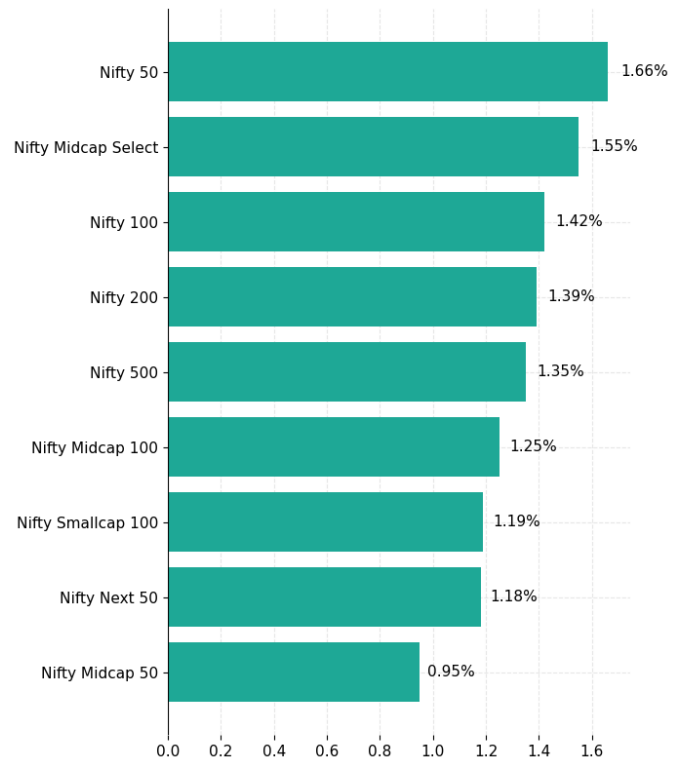


Indices Performance

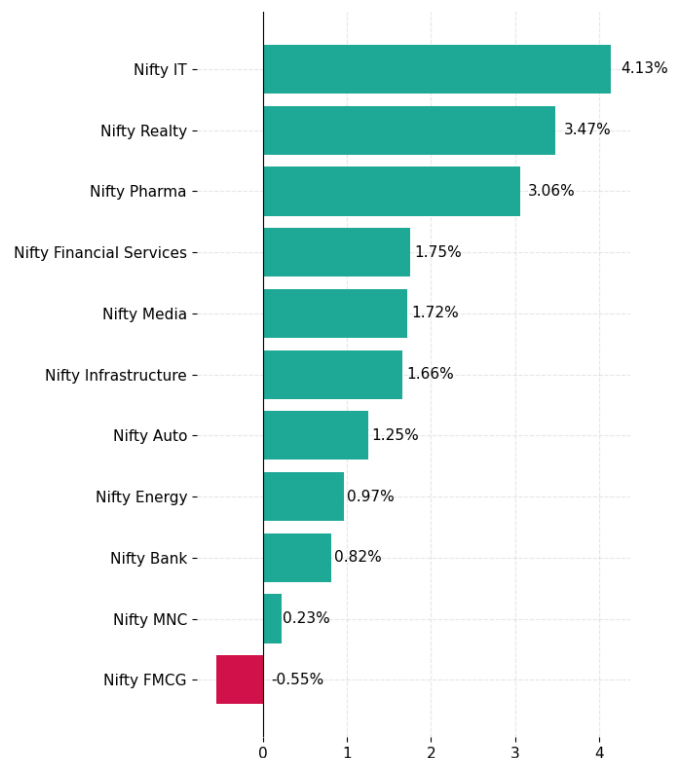
- For the third consecutive week, all the major market indices registered positive returns.
- The Nifty 50 index was up by +1.66% this week. Major contributors were the IT, Realty, and Pharma sectors.
- Nifty 100 registered a +1.42% positive return this week. The top contributors to the index were LTIM, BAJAJFINSV, and CHOLAFIN.
- Nifty Next 50 registered a return of +1.18% this week. CHOLAFIN, PFC, and RECLTD were the top contributors to the index.
- Nifty Midcap Select and Nifty Midcap 100 posted a positive return this week, with +1.55 and +1.25%, respectively. The top contributors to the midcap index were AUBANK, LUPIN, and PERSISTENT.
- The Nifty Smallcap 100 index posted a return of +1.19% this week, led by GSPL, TATAINVEST, and KEC.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 38:12, slightly down from last week's ADR of 39:11.



Source: NSE, INVES 21 Research

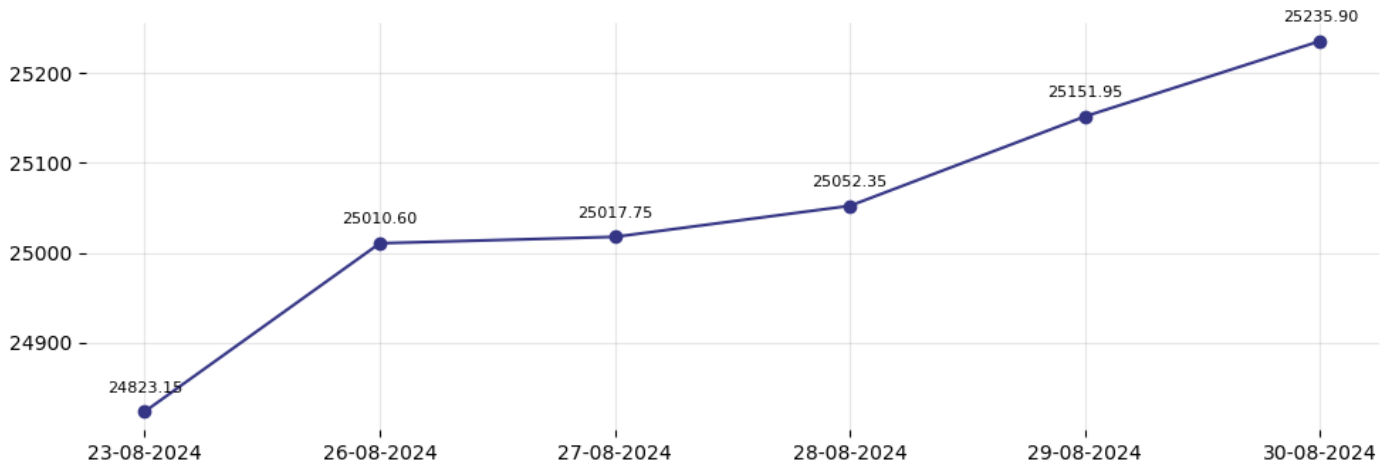
Sectoral Performance

- This week, all major sectoral indices registered a positive return, except for the Nifty FMCG.
- Nifty IT registered the highest return among the major sectoral indices, with a gain of +4.13%. The positive return was led by LTIM, PERSISTENT, and HCLTECH.
- Nifty Realty posted a positive return of +3.47% this week. PRESTIGE, LODHA, and BRIGADE were the major contributors to the index.
- Nifty Pharma registered a positive return of +3.06%, led by ALKEM, LUPIN, and LAURUSLAB.
- Nifty Auto posted a positive return of +1.25%, the top contributors to the index were BAJAJ-AUTO, TATAMOTORS, and M&M.
- Nifty Bank posted a positive return of +0.82% this week. AUBANK, INDISINDBK, and ICICIBANK were the top gainers in the index.
- Nifty FMCG posted a negative return this week; the index was down by -0.55%; VBL, MARICO, and PGHH were the major draggers in the index.



Source: NSE, INVES 21 Research

Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an inflow of ₹9,217.29 crore this week. The week ending Aug 23 saw an outflow of ₹-1,608.89 crore. DII showed net buying of ₹1,198.27 crore this week. DIIs had a net buying of ₹13,020.29 crore last week.

Participant	Amount (Cr.)
FII	9,217.29
DII	1,198.27

Data: Cash Market; Source: NSE, NSDL

Economic Events

According to the data released by the National Statistical Office (NSO) on Friday, India's gross domestic product (GDP) growth for the April-June quarter of FY25 stood at 6.7%, compared to 8.2% in FY24, due to the lower government spending and consumer spending. The agricultural sector recorded a 2% growth, down from 3.7% in the previous quarter. The gross value added (GVA), which is the expansion in 'financial, real estate and professional services,' slowed down to 7.1% from 12.6% a year ago in the same quarter. However, the growth improved in the manufacturing sector to 7% in Q1FY25, as compared to 5% in Q1FY24.

The Reserve Bank of India (RBI) revised its growth forecast for the April-June quarter down by 0.2% to 7.1% in its August monetary policy statement. This adjustment was due to lower government capital expenditure, reduced corporate profitability, and weaker core output. However, the RBI maintained its full-year GDP growth estimate for FY25 at 7.2%.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,732.7	24,984.3	25,126.3	25,377.9	25,520.0

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
LTIM	9.12%
BAJAJFINSV	8.73%
BAJFINANCE	6.89%
HCLTECH	5.53%
BHARTIARTL	5.46%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
COALINDIA	-2.58%
KOTAKBANK	-2.05%
ADANIENT	-1.85%
GRASIM	-1.81%
HINDUNILVR	-1.34%

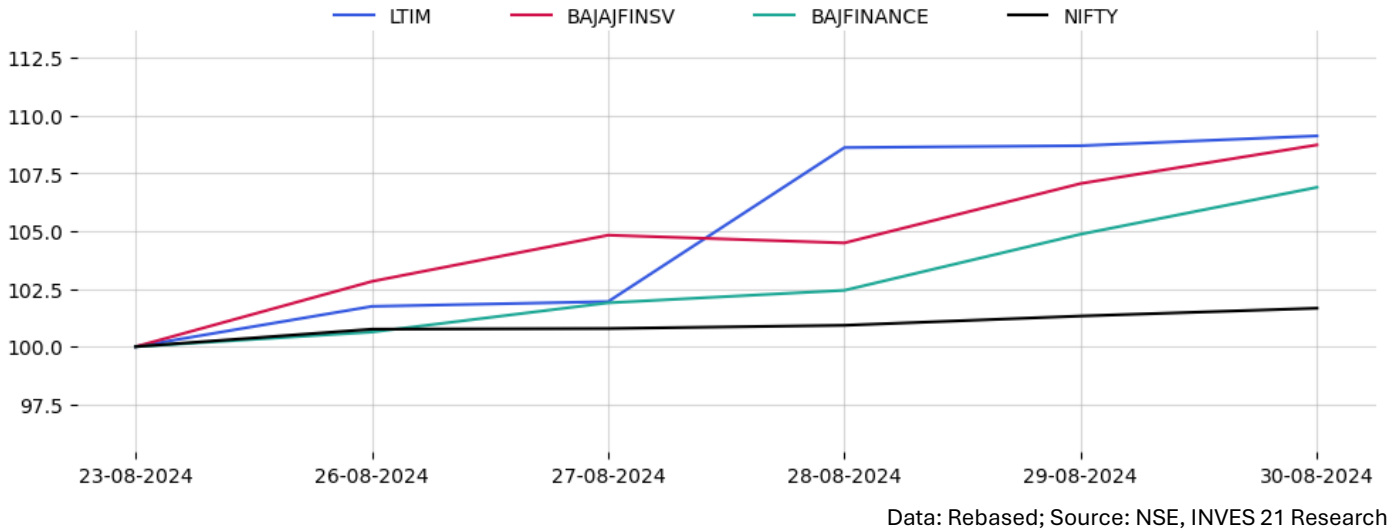
Source: NSE, INVES 21 Research

Volume Busters

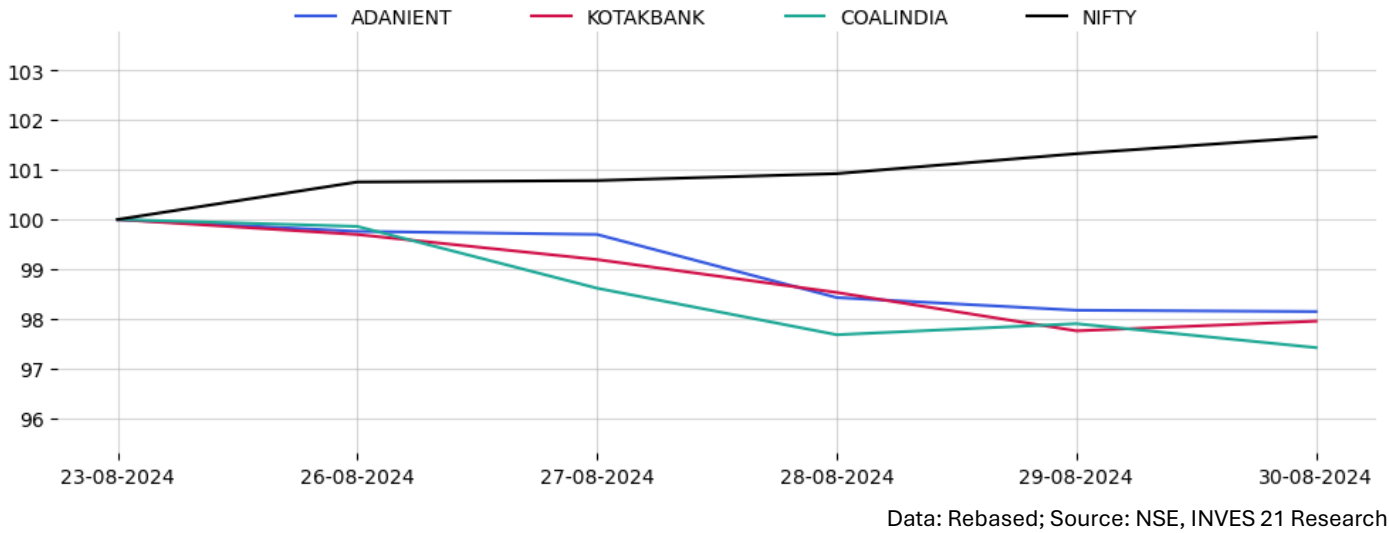
Stocks	Volumes
HDFCBANK	4,99,82,235
TATASTEEL	3,55,49,058
ONGC	1,67,75,827

Source: NSE, INVES 21 Research

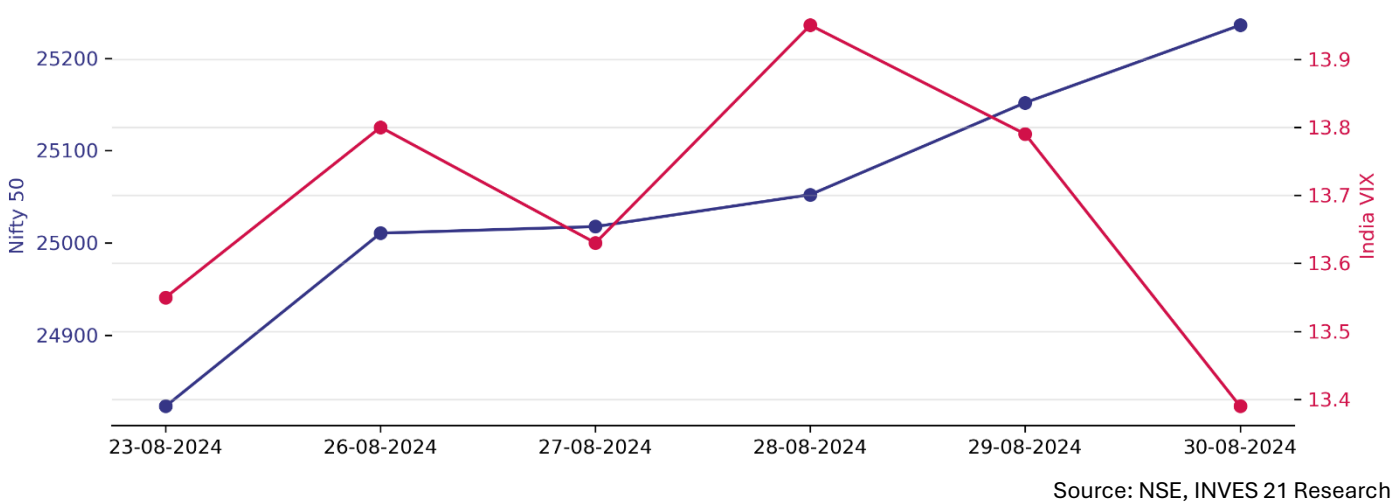
Top 3 Outperformers of the week



Top 3 Underperformers of the week



India VIX



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Corp Office: Plot No:27, 2nd Floor, Sri Vishnu Elite, Jayabheri Enclave, Gachibowli, Hyderabad- 500032,

Compliance Officer: Sushmita Bana | E-mail: compliance@inves21.com, Tel No. 040- 48444546

Website: www.inves21.com

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