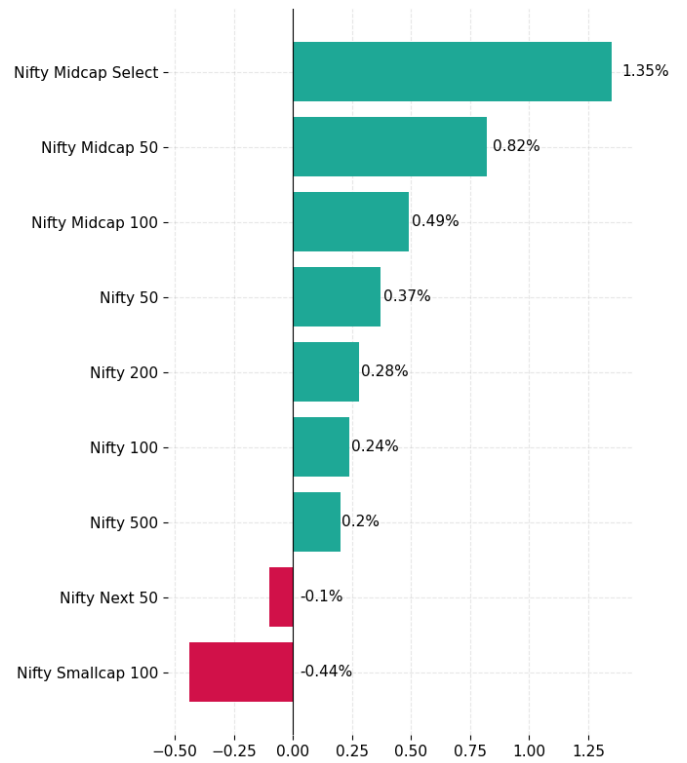


Indices Performance

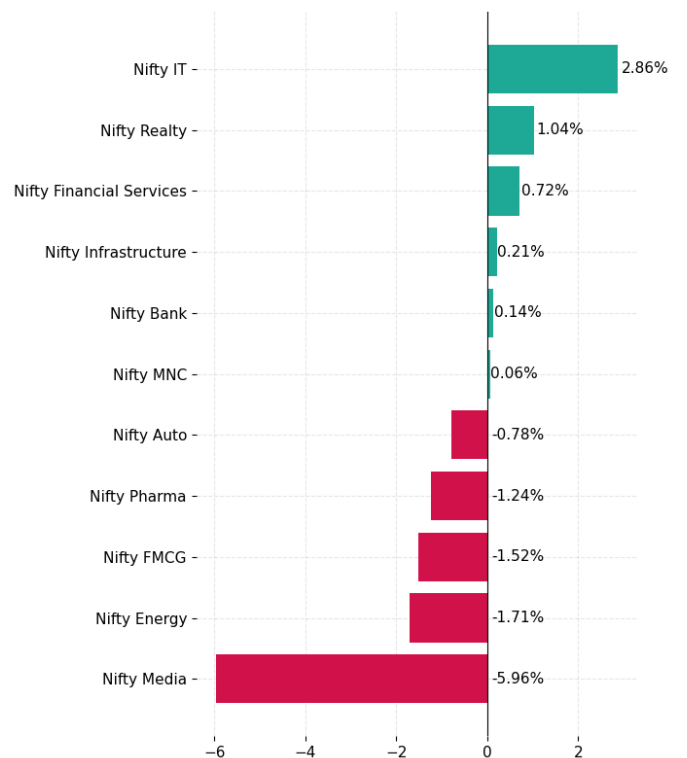
- This week, all major market indices registered a positive return, except for Nifty Next 50 and Nifty Smallcap 100.
- The Nifty 50 index was up by 0.37% this week. The IT, Realty, and Financial Services sectors were the major contributors to the index.
- Nifty 100 registered a 0.24% positive return this week. The top contributors to the index were VEDL, LTIM, and JINDALSTEL.
- Nifty Next 50 registered a negative return of -0.10% this week. BAJAJHLDING, LODHA, and HAL were the major contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 1.35% and 0.82%, respectively. The top contributors to the midcap index were HINDPETRO, VOLTAS, and MPHASIS.
- The Nifty Smallcap 100 index posted a negative return of -0.44% this week, led by SIGNATURE, NATIONALUM, and PVRINOX.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 23:27, significantly down from last week's ADR of 39:11.



Source: NSE, INVES 21 Research

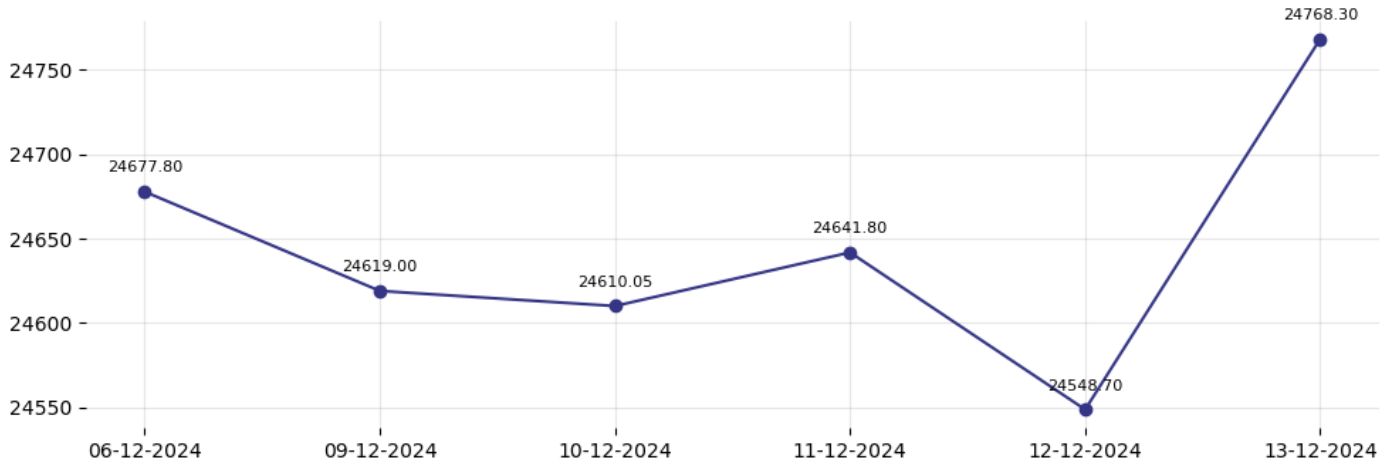
Sectoral Performance

- This week, 6 out of 11 major sectoral indices posted a positive return.
- Nifty IT registered the highest positive return among the major sectoral indices, with a return of 2.86%. PERSISTENT, COFORGE, and WIPRO led to positive returns in the index.
- Nifty Realty posted a positive return of 1.04% this week. RAYMOND, LODHA, and DLF were significant contributors to the index.
- Nifty Financial Services registered a positive return of 0.72%, led by MUTHOOTFIN, BAJFINANCE, and HDFC AMC.
- Nifty Auto posted a negative return of -0.78% this week. The top draggers in the index were MOTHERSON, TATAMOTORS, and HEROMOTOCO.
- Nifty Pharma posted a negative return of -1.24% this week. BIOCON, DIVISLAB, and AUROPHARMA were the top losers in the index.
- Nifty FMCG posted a negative return this week; the index was up by -1.52%. GODREJCP, HINDUNILVR, and TATACONSUM were the top losers 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 ₹-226.70 crore this week. The week ending Dec 8 saw an inflow of ₹11,933.59 crore. DII showed a net buying of ₹2,880.02 crore this week. DIIs had a net buying of ₹1,792.41 crore last week.

Participant	Amount (Cr.)
FII	-226.70
DII	2,880.02

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's retail inflation moderated to 5.48% in November 2024, down from 6.21% in October, marking a three-month low and staying below the RBI's upper tolerance level of 6%, statistics ministry data showed. Food inflation eased to 9.04% from 10.87% in October, driven by lower prices of vegetables and pulses. Inflation in housing and clothing stood at 2.9% and 2.8%, respectively, while fuel and lighting prices declined by 1.8%.

India's industrial output grew by 3.5% in October 2024, up from 3.1% in September, marking a three-month high. The growth, as per the Index of Industrial Production (IIP), was driven by a 4.1% increase in manufacturing, a 2% rise in electricity generation, and a 0.9% uptick in mining. However, these sectors saw stronger growth in October 2023. For the April-October period, industrial output grew by 4%, down from 7% a year earlier, reflecting a slowdown in the fiscal year's second half. The sectoral indices for October stood at 128.5 for mining, 147.9 for manufacturing, and 207.8 for electricity.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,969.0	24,368.6	24,580.5	24,980.1	25,192.0

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
LTIM	5.62%
BHARTIARTL	5.25%
BAJFINANCE	4.85%
WIPRO	4.24%
INFY	4.02%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TATACONSUM	-4.59%
DIVISLAB	-4.14%
HINDUNILVR	-3.77%
NTPC	-3.34%
TATAMOTORS	-3.24%

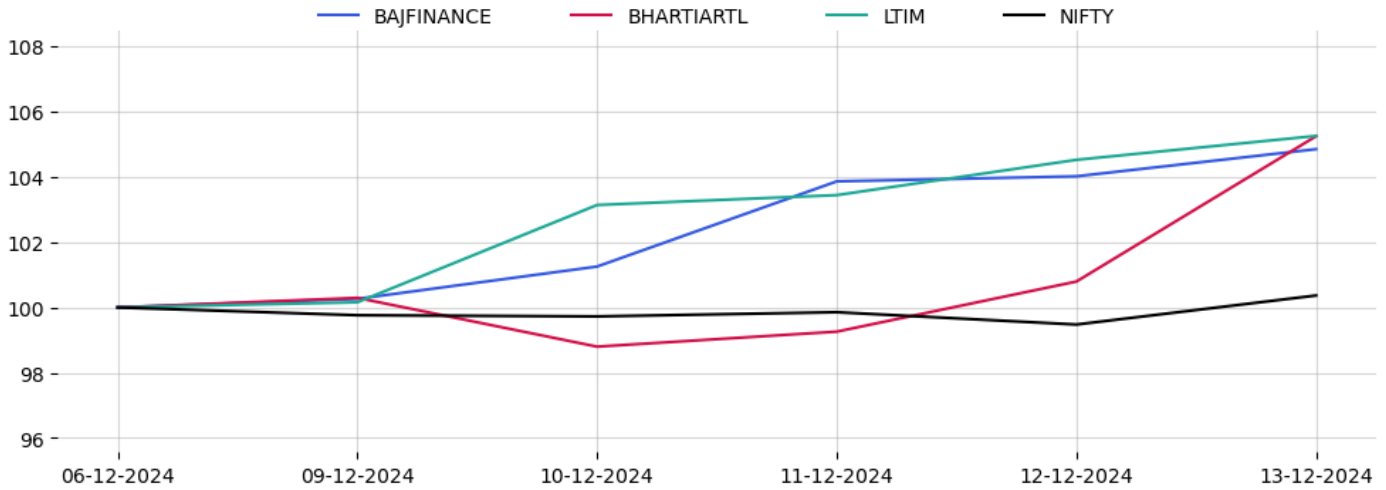
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	3,19,82,432
RELIANCE	1,68,31,848
TATAMOTORS	1,34,78,159

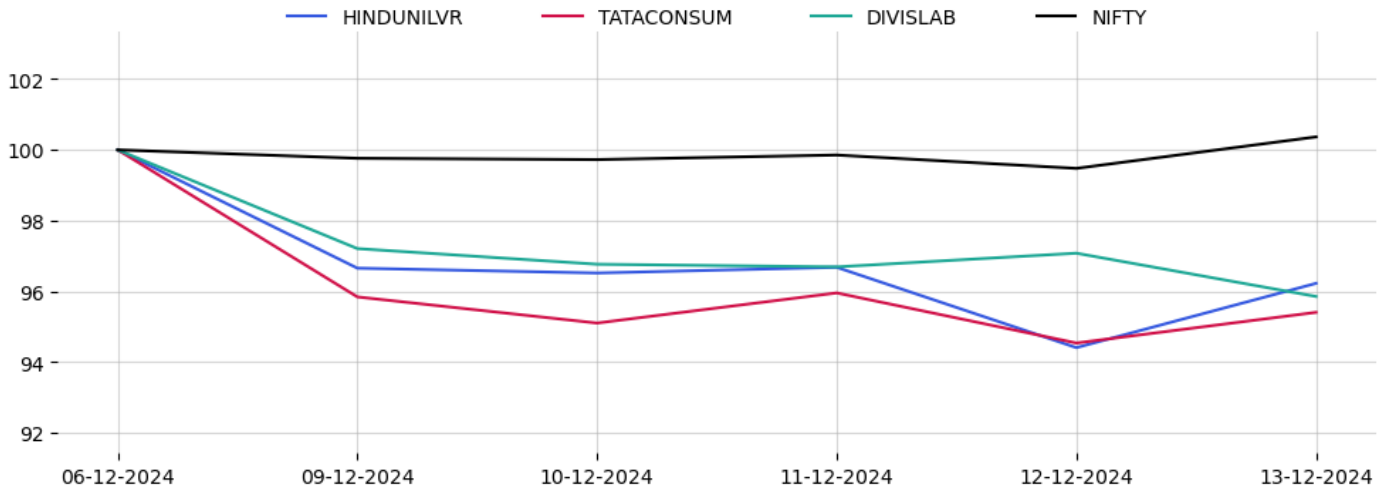
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



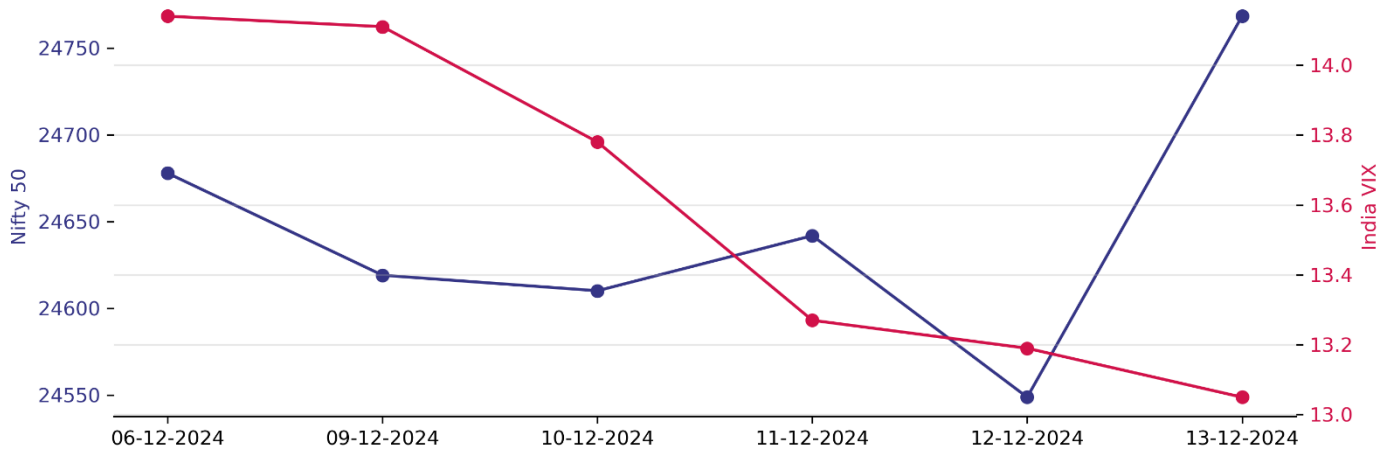
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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