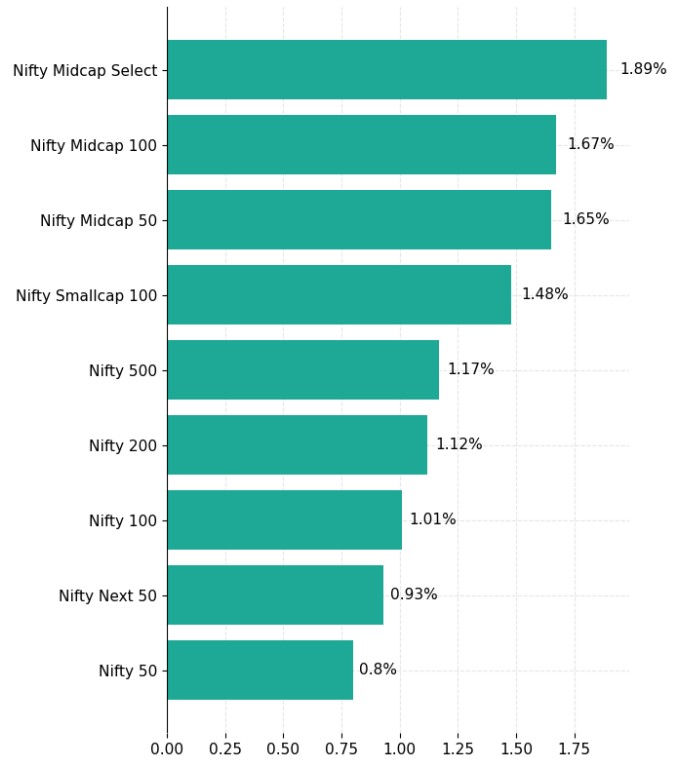


## Indices Performance

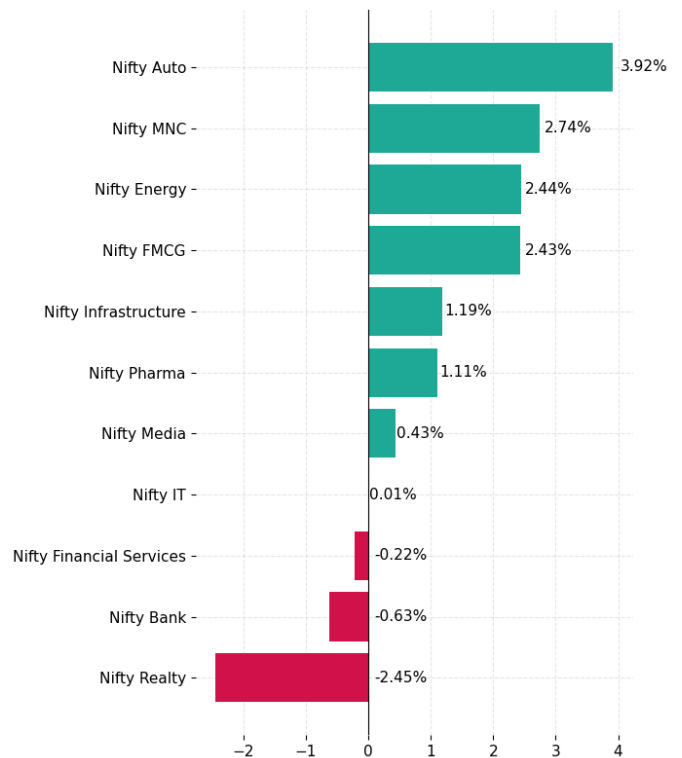
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 0.80% this week. The Auto, Energy, and FMCG sectors were the significant contributors to the index.
- Nifty 100 registered a 1.01% positive return this week. The top contributors to the index were ONGC, MARUTI, and EICHERMOT.
- Nifty Next 50 registered a return of 0.93% this week. M&M, ADANI PORTS, and TATAMOTORS were the major contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 1.89% and 1.65%, respectively. The top contributors to the midcap index were IDEA, JUBLFOOD, and VOLTAS.
- The Nifty Smallcap 100 index posted a positive return of 1.48% this week, led by BLUESTARCO, CREDITACC, and APARIND.
- 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

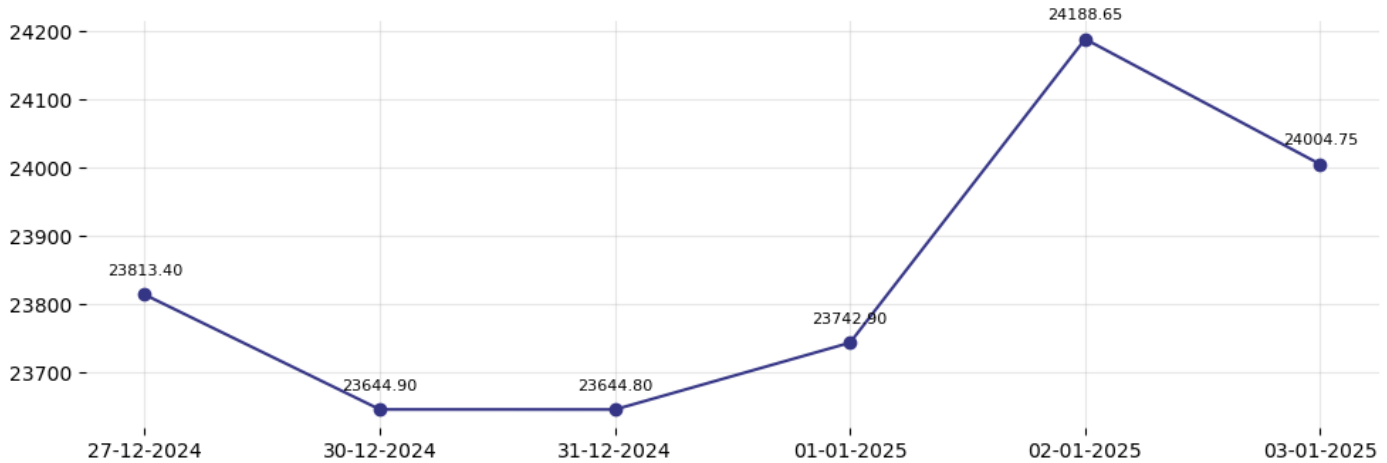
## Sectoral Performance

- This week, 8 out of 11 major sectoral indices posted a positive return.
- Nifty Auto registered the highest positive return among the major sectoral indices, with a return of 3.92%. MARUTI, EICHERMOT, and ASHOKLEY led to positive returns in the index.
- Nifty Energy posted a positive return of 2.44% this week. ONGC, COALINDIA, and ADANIPOWER were significant contributors to the index.
- Nifty FMCG registered a positive return of 2.43%, led by the UNITDSPR, UBL, and GODREJCP.
- Nifty IT posted a positive return of 0.01% this week. The top contributors to the index were HCLTECH, COFORGE, and LTTS.
- Nifty Bank posted a negative return of -0.63% this week. ICICIBANK, HDFCBANK, and SBIN were the top draggers in the index.
- Nifty Realty posted a negative return this week; the index was down by -2.45%. PHOENIXLTD, PRESTIGE, and SOBHA 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 ₹-11,041.59 crore this week. The week ending Dec 27 saw an outflow of ₹-6,322.88 crore. DII showed a net buying of ₹9,253.70 crore this week. DIIs had a net buying of ₹10,927.73 crore last week.

Participant	Amount (Cr.)
FII	-11,041.59
DII	9,253.70

Data: Cash Market; Source: NSE, NSDL

## Economic Events

The Index of Eight Core Industries (ICI) grew by 4.3% year-on-year (YoY) in November 2024 (provisional), according to the data released by the Ministry of Commerce & Industry on Tuesday. The growth was driven by positive performance in key sectors, with Cement production leading at 13.0% YoY, followed by Coal (7.5%), Steel (4.8%), Electricity (3.8%), Petroleum Refinery Products (2.9%), and Fertilizers (2.0%). However, Crude Oil and Natural Gas production declined by 2.1% and 1.9% YoY, respectively.

India's manufacturing sector ended 2024 on a softer note, as the Manufacturing Purchasing Managers' Index (PMI) fell to 56.4 in December, down slightly from 56.5 in November, according to the HSBC Final India Manufacturing PMI compiled by S&P Global. This marked the weakest growth rate of the year but remained above the long-term average of 54.1, indicating a robust expansion in the sector. Despite easing cost pressures and strong job creation, the data pointed to softer demand in December, with slower improvements in both output and new orders, which serve as key indicators of overall demand conditions in the sector.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,838.6	23,921.7	24,059.1	24,142.1	24,279.5

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
ONGC	9.28%
MARUTI	9.08%
EICHERMOT	8.90%
BAJAJFINSV	7.71%
BAJFINANCE	7.23%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
WIPRO	-4.74%
HINDALCO	-4.25%
ICICIBANK	-3.25%
HDFCBANK	-2.73%
DRREDDY	-2.65%

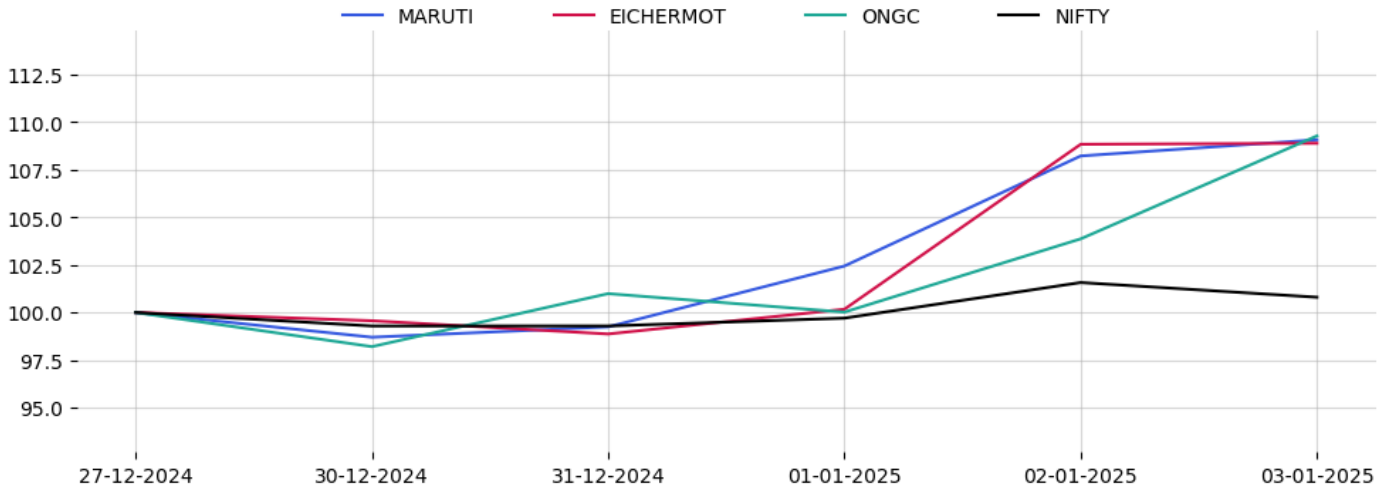
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	2,28,51,324
ITC	2,06,76,259
ONGC	1,94,69,753

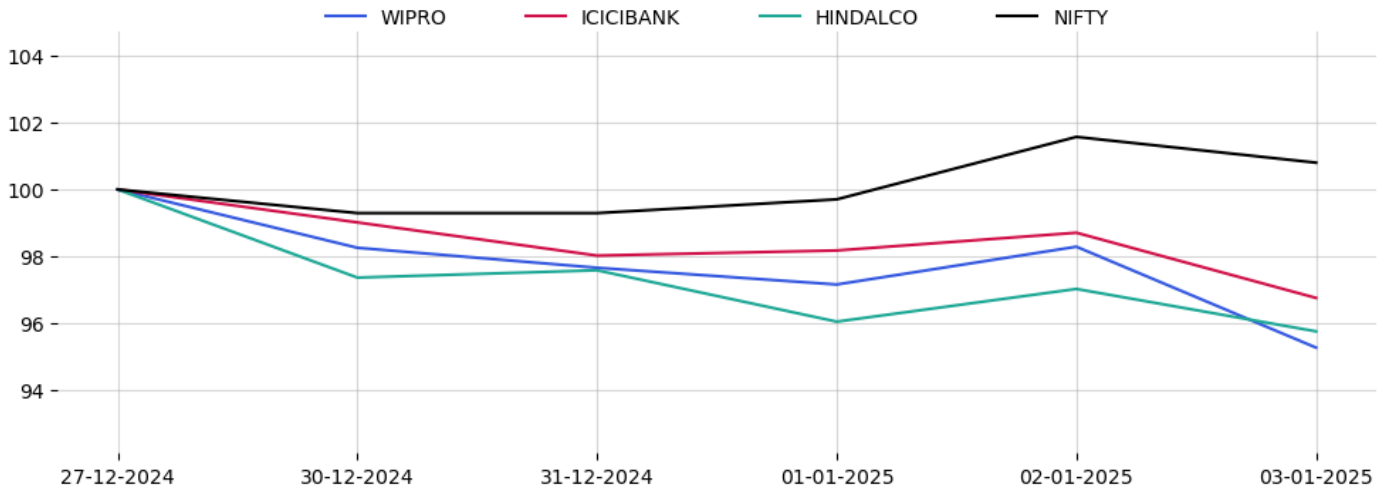
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



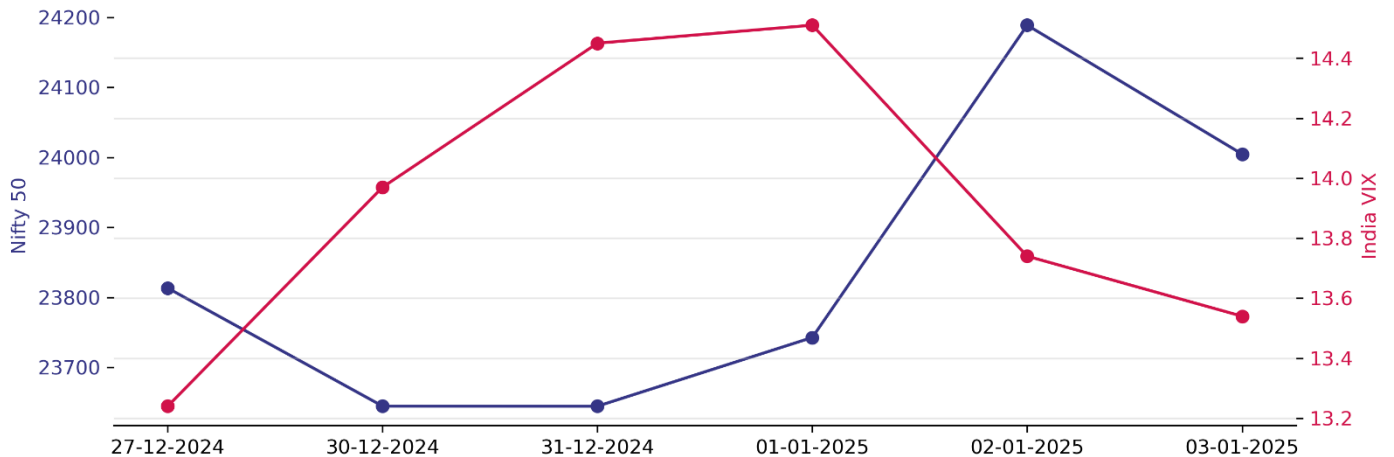
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

**Copyright of this document vests with S A Artha Securities Private Limited.**

S A Artha Securities Private Limited

**SEBI Reg No:** Stock Broker: INZ000316838, ARN: 279815, SEBI Research Analyst Reg No: INH000016667,

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

**Compliance Officer:** Mr. Raju N H N | E-mail: [compliance@inves21.com](mailto:compliance@inves21.com), Tel No. 040- 48444546

**Website:** [www.inves21.com](http://www.inves21.com)

## Terms & Conditions

The information in this report has been prepared by S A Artha Securities Private Limited. It is intended to be used only by the person or entity it addresses. The report and the information contained herein are strictly confidential. They should not be alerted in any way, transmitted to, copied, or distributed, in part or in whole, to any other person or to the media or reproduced in any form without prior written consent. The information and opinions in the report are subject to change without prior notice. The information contained in the report is obtained from public sources and sources to be reliable, but no independent verification has been made, nor is its accuracy.

The document and information herein are solely for information purposes. They shall not be used or considered as an offer document or solicitation of an offer to buy, sell, or subscribe for securities or other financial instruments. Though disseminated to all the customers simultaneously, not all customers may receive the reports at the same time. S A Artha Securities Private Limited will not treat recipients as customers by virtue of their receiving reports.

## Disclaimer

This report does not constitute an offer to sell or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. Though disseminated to all customers who are due to receive the same, not all customers may receive this report at the same time. S A Artha Securities Private Limited will not treat recipients as customers by virtue of their receiving this information/report.

Nothing in this report constitutes investment, legal, accounting, or tax advice or a representation that any investment or strategy is suitable or appropriate for customer satisfaction. The securities and strategies discussed and opinions expressed, if any, in this report may not be suitable for all investors, who must make their own investment decisions based on their own investment objectives, financial positions, and needs of specific recipients.

While we endeavor to update the information herein on a reasonable basis, S A Artha Securities Private Limited, its subsidiaries, and associated companies, their directors, and employees are under no obligation to update or keep the information current. Also, regulatory compliance or other reasons may prevent S A Artha Securities Private Limited and its affiliates from doing so. This report is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision.

Recipients of this report should also be aware that past performance is not necessarily a guide to future performance, and the value of investments can go down as well. The user assumes the entire risk of any use made of this information. Each recipient of this document should make such investigations as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this document (including the merits and risks involved) and should consult its own advisors to determine the merits and risks of such an investment. The investment discussed, or views expressed may not be suitable for all investors. We do not undertake to advise you as to any change of our views.

This information/recommendation/report is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country, or other jurisdiction where such distribution, publication, availability or use would be contrary to law, regulation or which would subject S A Artha Securities Private Limited and affiliates to any registration or licensing requirement within such jurisdiction. The securities described herein may or may not be eligible for sale in all jurisdictions or to certain categories of investors. Persons in whose possession this report may come are required to inform themselves of and to observe such restriction.

S A Artha Securities carries out proprietary trading in the cash and derivative segment. Our proprietary trading and investment business may make investment decisions that are inconsistent with the recommendations expressed herein.

The analyst certifies that the analyst might have dealt or traded directly or indirectly in securities of the company and that all the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities and do not necessarily reflect those of S A Artha Securities Private Limited.