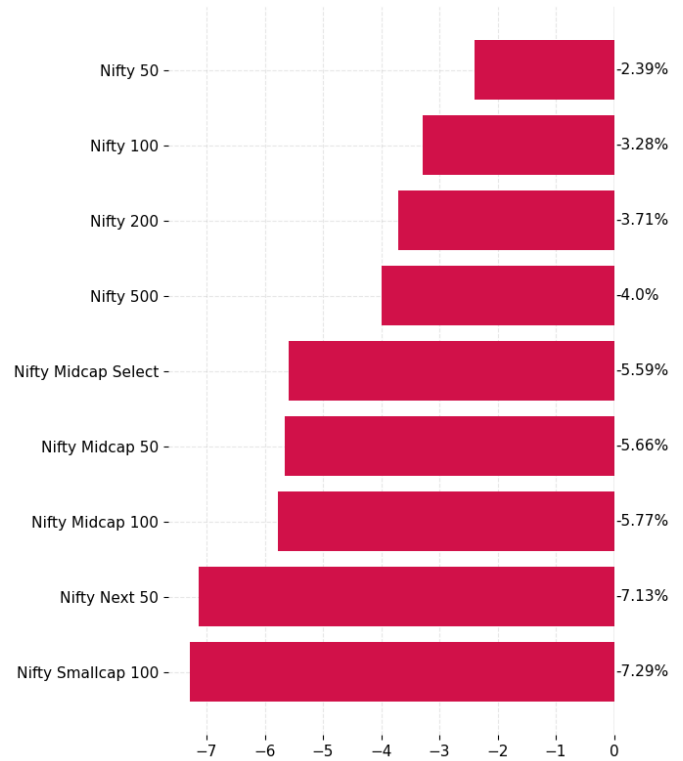


## Indices Performance

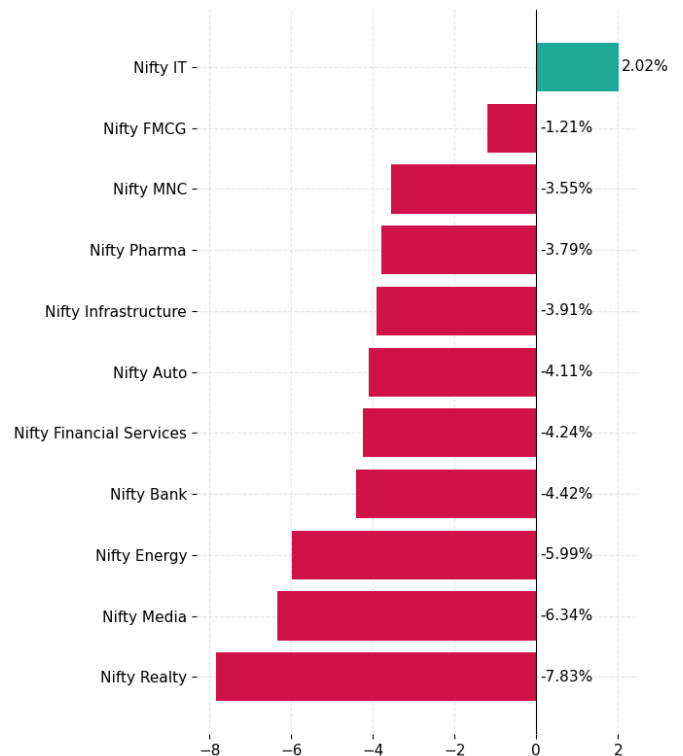
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -2.39% this week. The Realty, Bank, and Auto sectors were the significant draggers to the index.
- Nifty 100 registered -3.28% negative return this week. The top draggers to the index were RECLTD, BHEL, and SHRIRAMFIN.
- Nifty Next 50 registered a negative return of -7.13% this week. NAUKRI, PFC, and IRFC were the major draggers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -5.59% and -5.66%, respectively. The top losers in the midcap index were GODREJPROP, ASHOKLEY, and POLYCAB.
- The Nifty Smallcap 100 index posted a negative return of -7.29% this week, led by BLUESTAR, FIVESTAR, and PPLPHARMA.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 16:34, significantly down from last week's ADR of 38:12.



Source: NSE, INVES 21 Research

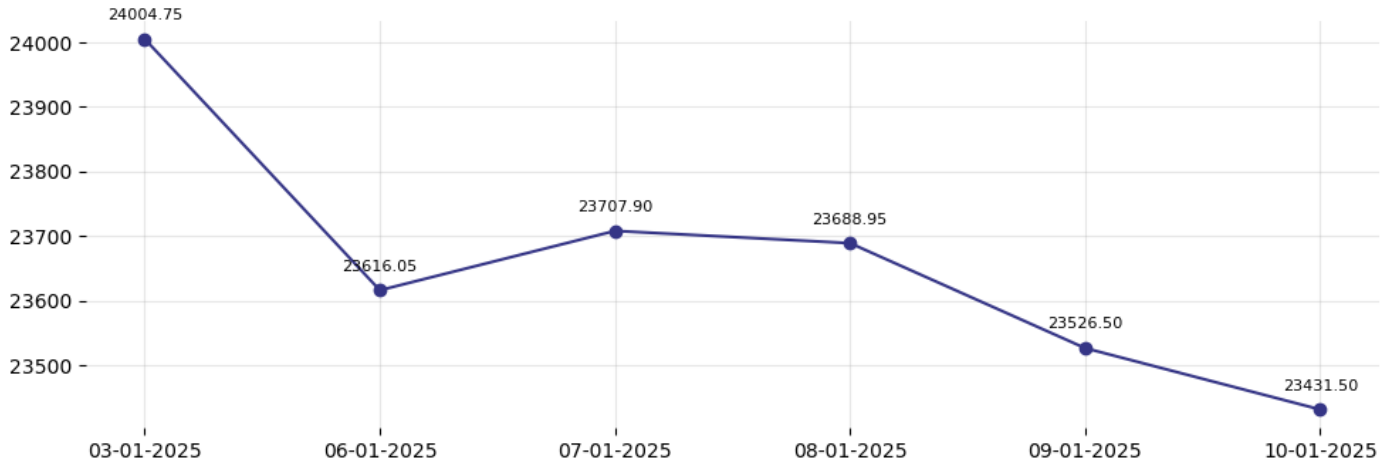
## Sectoral Performance

- This week, 10 out of 11 major sectoral indices posted a negative return.
- Nifty IT registered a positive return among the major sectoral indices, with a return of 2.02%. LTIM, TCS, and LTTS led to positive returns in the index.
- Nifty FMCG posted a negative return of -1.21% this week. RADICO, VBL, and UNITDSPR were major draggers in the index.
- Nifty Pharma registered a negative return of -3.79%, led by NATCOPHARM, AUROPHARM, and LUPIN.
- Nifty Auto posted a negative return of -4.11% this week. The major draggers in the index were ASHOKLEY, APOLLOTYRE, and MOTHERSON.
- Nifty Bank posted a negative return of -4.42% this week. CANBK, FEDERALBNK, and PNB were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -7.83%. GODREJPROP, BRIGADE, 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 ₹-16,854.25 crore this week. The week ending Jan 3 saw an outflow of ₹-11,041.59 crore. DII showed a net buying of ₹21,682.76 crore this week. DIIs had a net buying of ₹9,253.70 crore last week.

Participant	Amount (Cr.)
FII	-16,854.25
DII	21,682.76

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's Services PMI rose to 59.3 in December 2024, up from 58.4 in November, reflecting growth in the services sector driven by strong demand, according to the HSBC India Services PMI compiled by S&P Global. This marked the highest expansion in four months, with new orders increasing for the 41st consecutive month. The finance and insurance sectors led the growth, benefiting from strong business activity and new orders, as companies focused on capacity expansion to meet rising demand.

In December 2024, inflow into equity mutual funds increased by 14.5% to ₹41,155 crore, compared to ₹35,943.4 crore in November, according to AMFI data. Mid-cap funds saw a 4% rise in inflow to ₹5,093 crore, while small-cap funds witnessed a 13.5% jump to ₹4,667 crore. However, large-cap funds experienced a 21% decline, with inflow dropping from ₹2,547 crore in November to ₹2,010 crore in December. SIP inflows, which were ₹17,610 crore in December 2023, steadily rose throughout the year to ₹26,459 crore in December 2024, contributing to ₹2.68 trillion in total SIP inflows from January to December.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,101.7	23,266.6	23,509.2	23,674.1	23,916.7

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
TCS	4.04%
TATACONSUM	3.55%
HCLTECH	2.49%
BRITANNIA	2.17%
SBILIFE	2.11%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
SHRIRAMFIN	-12.74%
TRENT	-9.90%
NTPC	-9.30%
TATASTEEL	-7.90%
ADANIEN	-7.42%

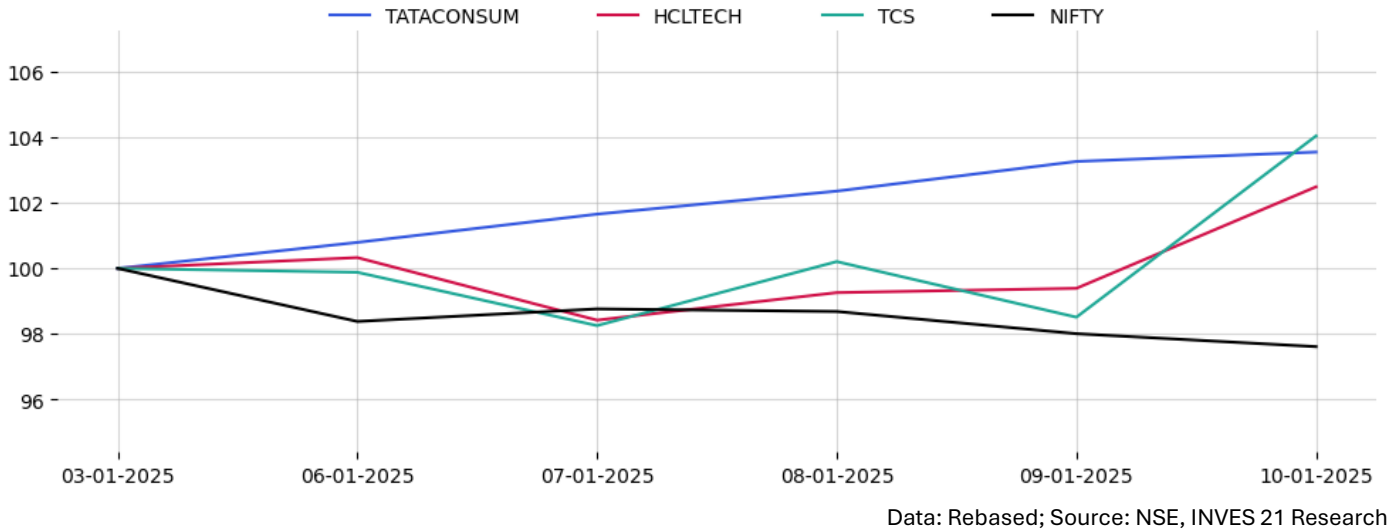
Source: NSE, INVES 21 Research

## Volume Busters

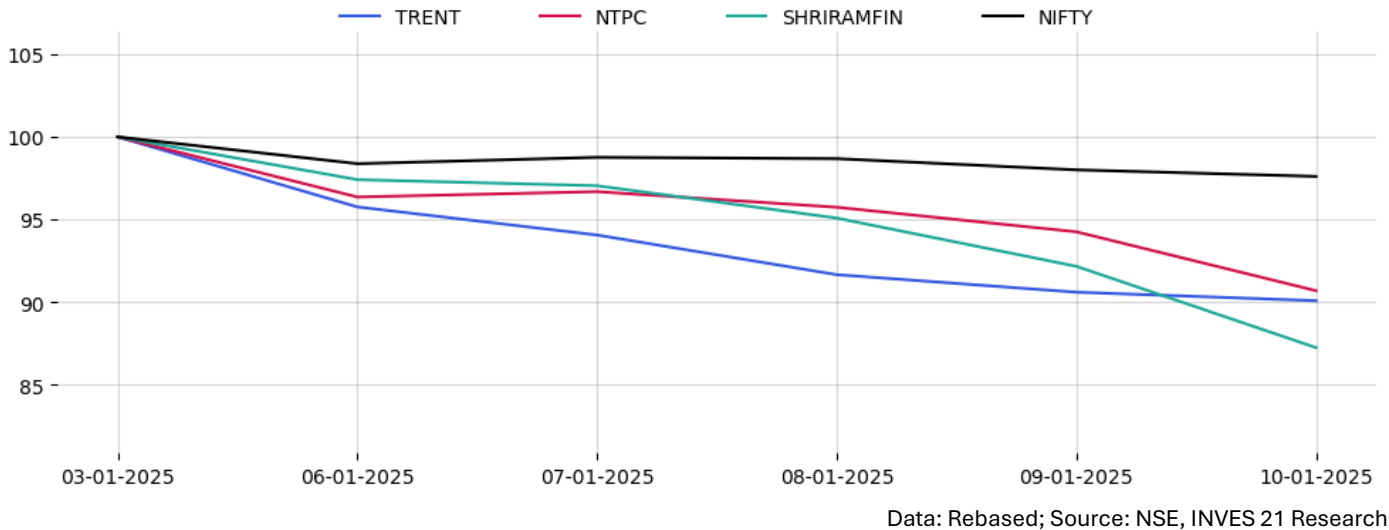
Stocks	Volumes
ONGC	3,19,96,813
TATASTEEL	3,17,56,790
ITC	1,92,89,839

Source: NSE, INVES 21 Research

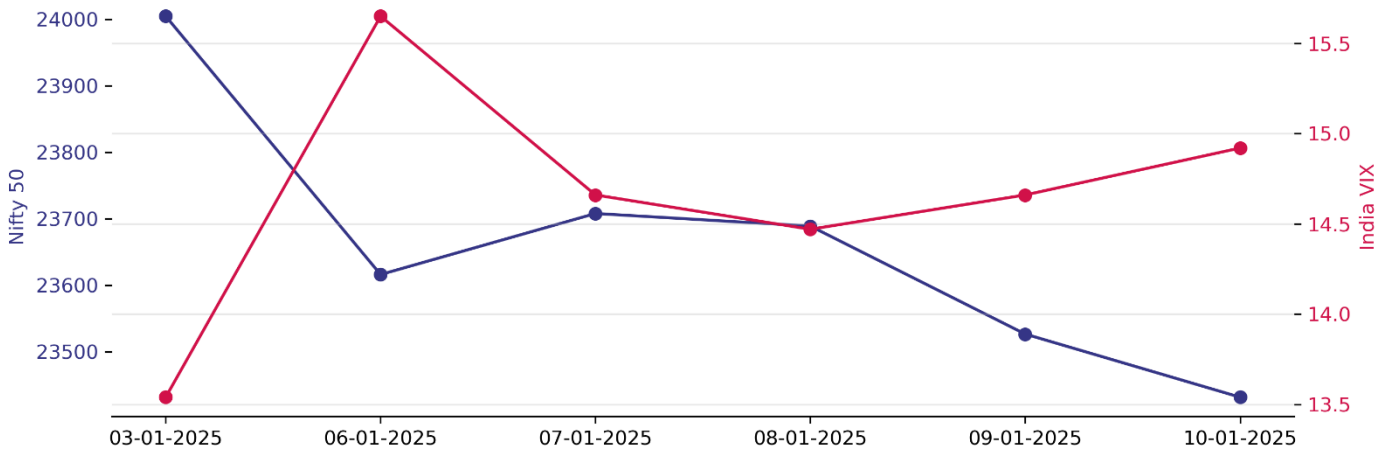
## Top 3 Outperformers of the week



## Top 3 Underperformers of the week



## India VIX



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