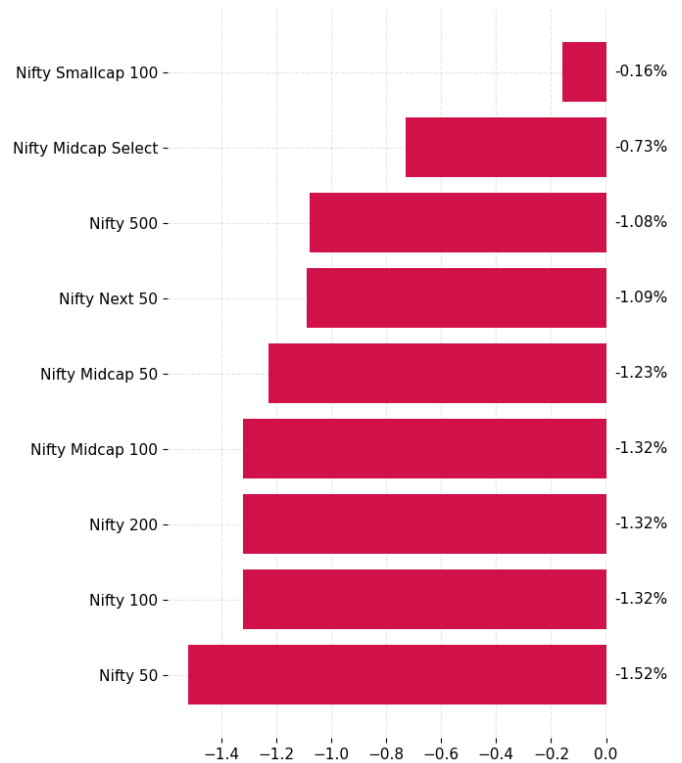


Indices Performance

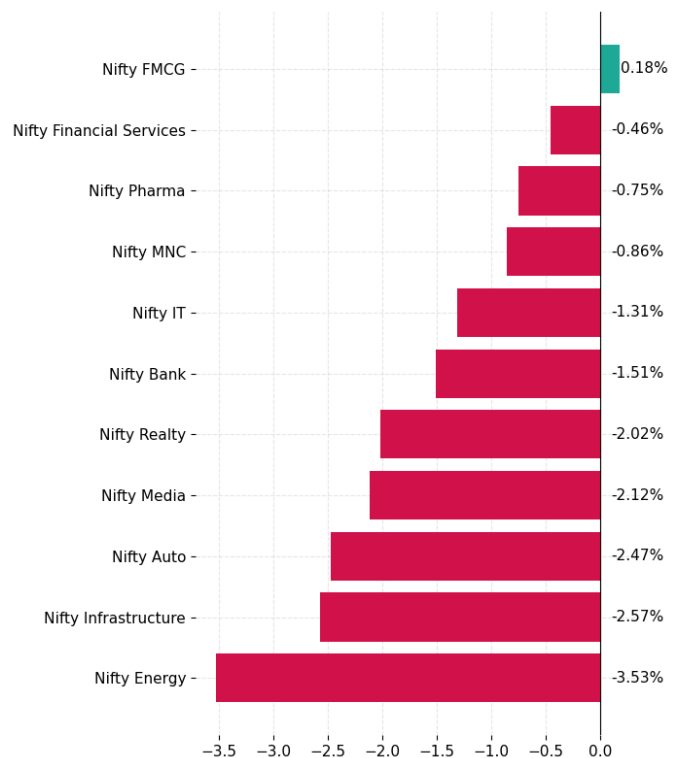
- All major market indices posted negative returns this week.
- The Nifty 50 index was down by -1.52% this week. Major contributors were the Energy, Infrastructure, and Auto sectors.
- Nifty 100 registered a -1.32% negative return this week. The top contributors to the index were CANBK, COALINDIA, and ONGC.
- Nifty Next 50 registered a return of -1.09% this week. CANBK, GAIL, and BANKBARODA were the top contributors to the index.
- Nifty Midcap Select and Nifty Midcap 100 posted a negative return this week, with -0.73% and -1.32%, respectively. The top contributors to the midcap index were IDEA, FEDERALBNK, and PAGEIND.
- The Nifty Smallcap 100 index posted a return of -0.16% this week, led by HUDCO, SWANENERGY, and RBLBANK.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 35:14, slightly down from last week's ADR of 38:12.



Source: NSE, INVES 21 Research

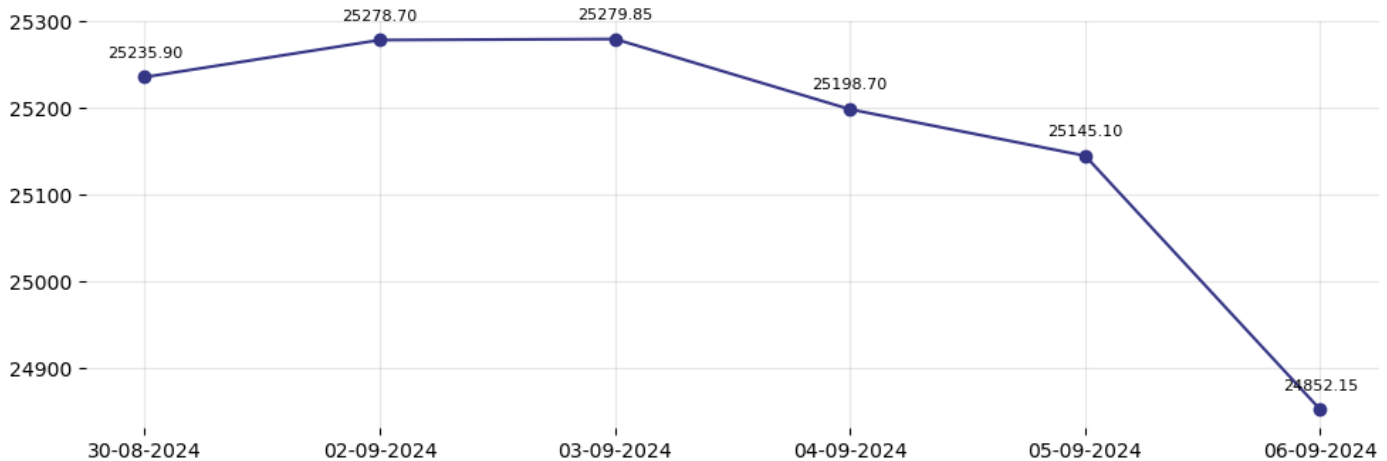
Sectoral Performance

- This week, all major sectoral indices registered a negative return, except for the Nifty FMCG.
- Nifty Energy registered the lowest return among the major sectoral indices, with a return of -3.53%. The negative return was led by COALINDIA, ONGC, and NTPC.
- Nifty Infrastructure posted a negative return of -2.57% this week. GAIL, TATAPOWER, and SIEMENS were the major contributors to the index.
- Nifty Auto registered a negative return of -2.47%, led by TATMOTORS, EICHERMOT, and M&M.
- Nifty Bank posted a negative return of -1.51%. The top contributors to the index were FEDERALBNK, BANKBARODA, and PNB.
- Nifty IT posted a negative return of -1.31% this week. WIPRO, INFY, and TCS were the top losers in the index.
- Nifty FMCG posted a positive return this week; the index was up by +0.18%; BALRAMCHIN, GODREJCP, and TATACONSUM were the major contributors to 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 ₹2,430.53 crore this week. The week ending Aug 30 saw an inflow of ₹9,217.29 crore. DII showed net buying of ₹7,442.20 crore this week. DIIs had a net buying of ₹1,198.27 crore last week.

Participant	Amount (Cr.)
FII	2,430.53
DII	7,442.20

Data: Cash Market; Source: NSE, NSDL

Economic Events

August's GST collections stood at ₹1.74 lakh crore, showing a 10% year-on-year growth, though slightly lower than July's ₹1.82 lakh crore. The highest collection this year was ₹2.10 lakh crore in April. The central government collected ₹30,862 crores, and states received ₹38,411 crores. Integrated GST (IGST) from imports and inter-state sales totaled ₹93,621 crores. The finance ministry estimates a 10.5% nominal economic growth this fiscal.

India's Manufacturing PMI for August was 57.5, slightly down from 58.1 in July. The PMI had previously stood at 58.3 in June, 57.5 in May, and 58.8 in April, according to data released by the HSBC final India Manufacturing Purchasing Managers Index (PMI), compiled by S&P Global.

India's services sector growth, which slowed to a five-month low in May, picked up in June due to a surge in sales, according to an HSBC business survey. The Services PMI rose to 60.5 in June, up from 60.2 in May, after hitting a six-month high of 61.8 in January.

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
HEROMOTOCO	5.29%
ASIANPAINT	4.70%
BAJAJFINSV	4.16%
TITAN	3.66%
SBILIFE	2.49%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
COALINDIA	-6.93%
ONGC	-6.64%
TATAMOTORS	-5.58%
DRREDDY	-5.18%
NTPC	-5.14%

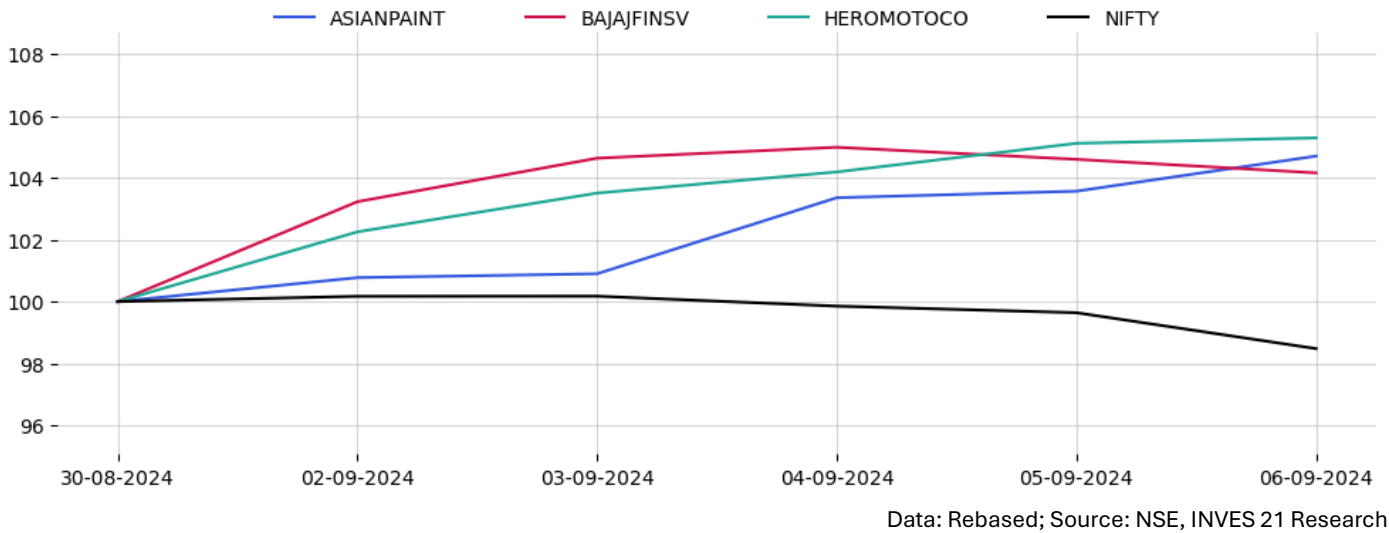
Source: NSE, INVES 21 Research

Volume Busters

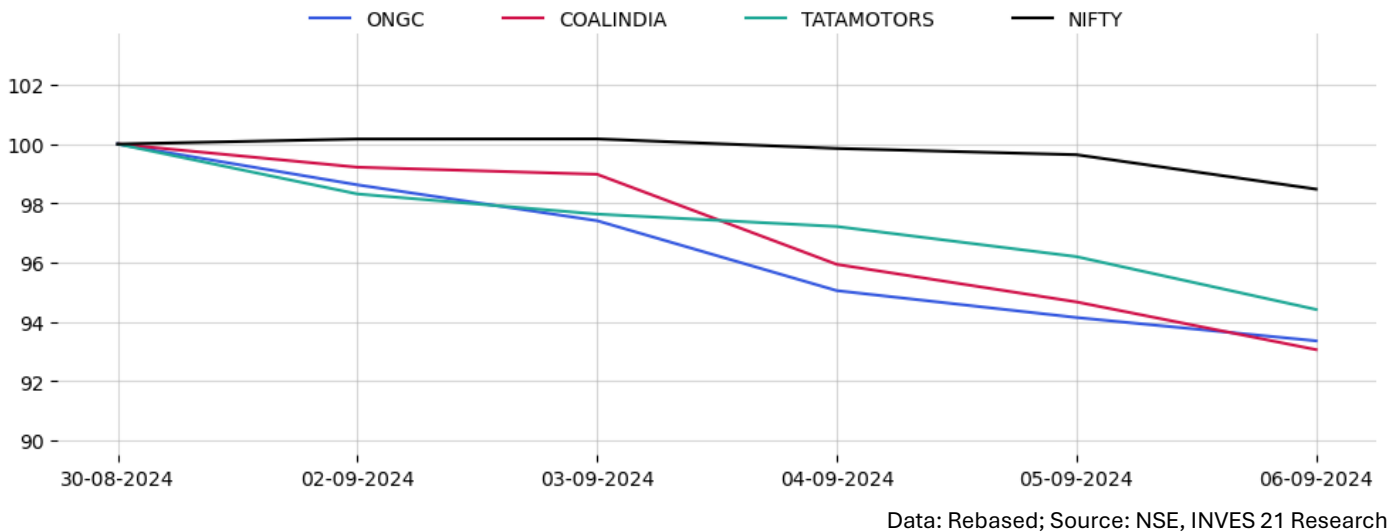
Stocks	Volumes
HDFCBANK	4,91,88,360
TATASTEEL	3,21,28,812
ONGC	1,79,79,127

Source: NSE, INVES 21 Research

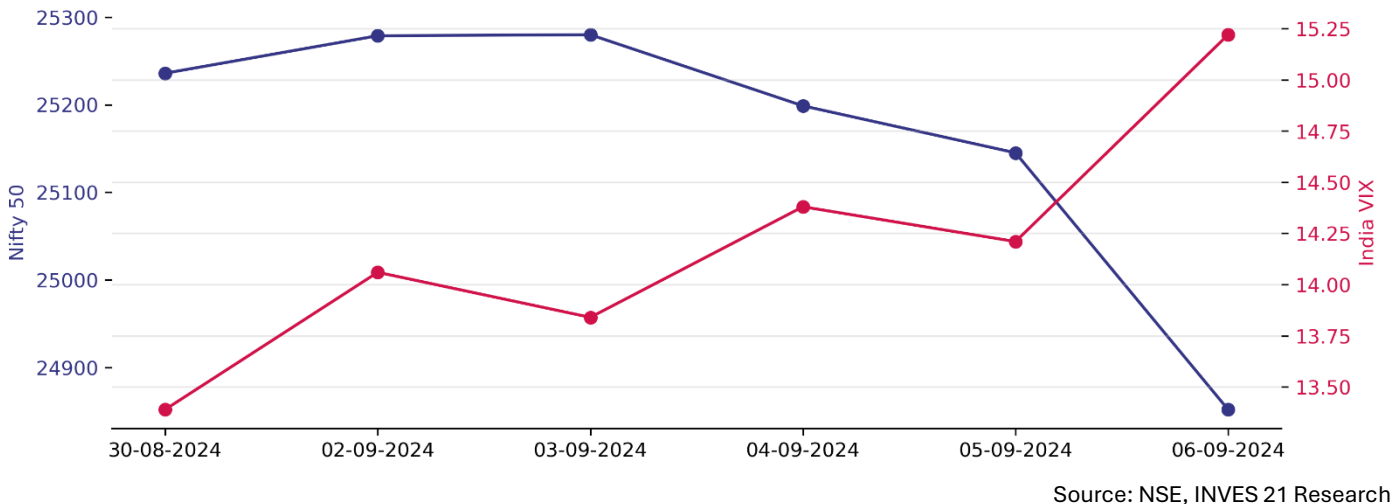
Top 3 Outperformers of the week



Top 3 Underperformers of the week



India VIX



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

S A Artha Securities Private Limited

SEBI Reg No: Strock 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: Sushmita Bana | E-mail: compliance@inves21.com, Tel No. 040- 48444546

Website: 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.