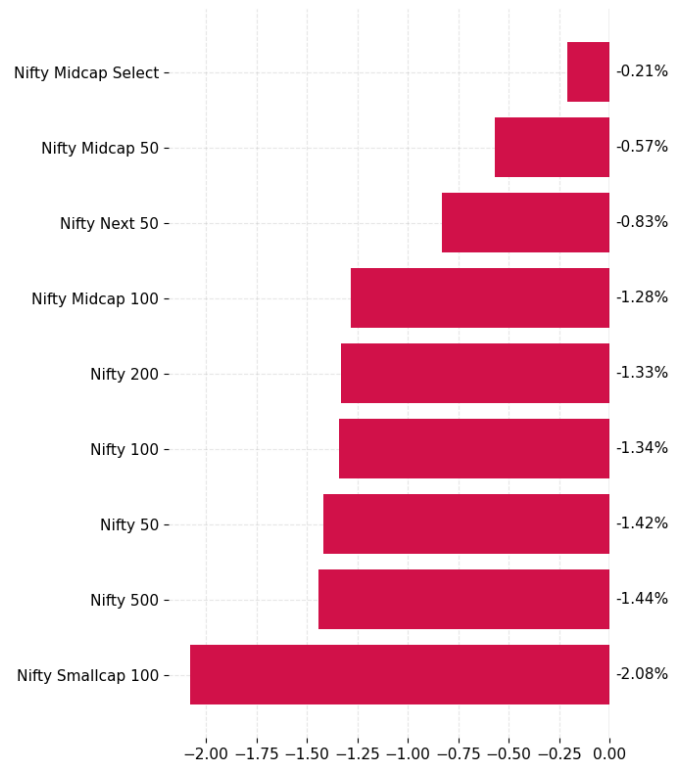


## Indices Performance

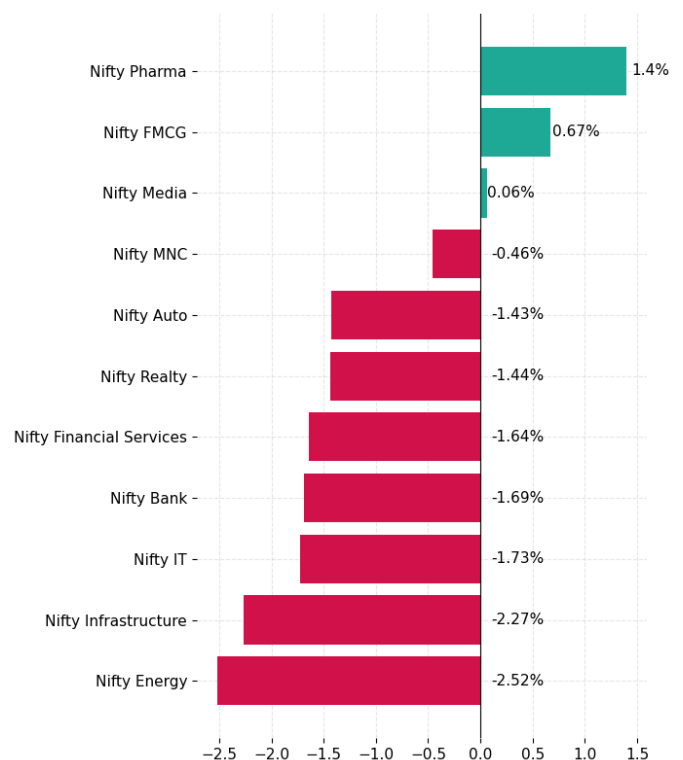
- For the second consecutive week, all the major indices registered a negative return. However, last week, only Nifty Midcap 100 posted a positive return.
- The Nifty 50 index was down by -1.42% this week. Major contributors were the Energy, IT, and Banking sectors.
- Nifty 100 registered -1.34% negative return this week. The top contributors to the index were TATAPOWER, SHREECEM, and ADANIENSOL.
- Nifty Next 50 registered a return of -0.83% this week. PFC and TATAPOWER were the top draggers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week. The indices were down by -0.21% and -0.57%, respectively. However, Nifty Midcap 100 was down by -1.28% this week.
- The Nifty Smallcap 100 index posted a return of -2.08% this week, led by the EXIDEIND, and NCC.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 0.39, down from last week's ADR of 0.61.



Source: NSE, INVES 21 Research

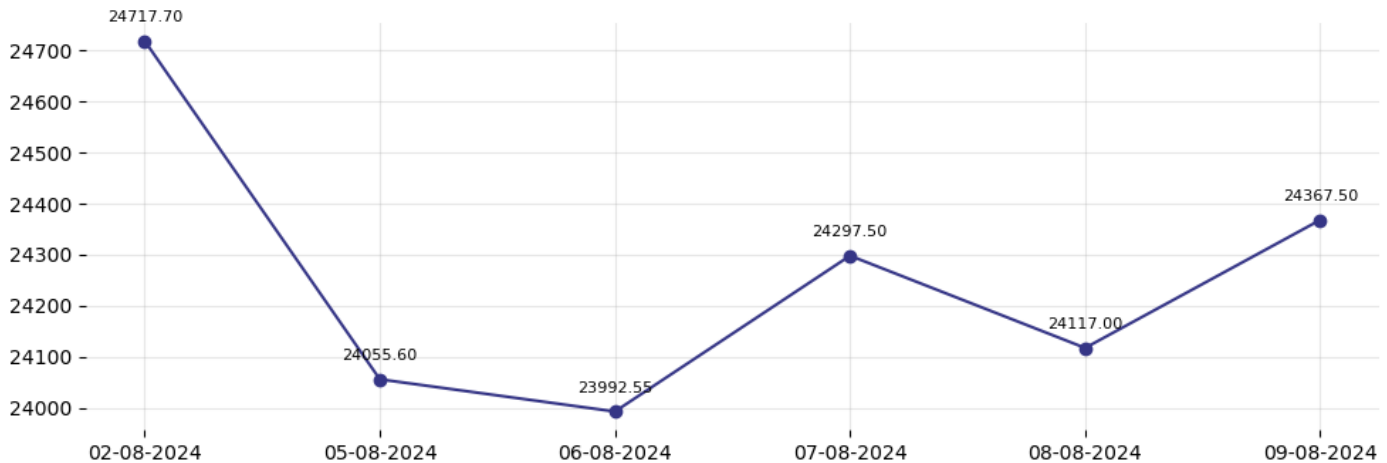
## Sectoral Performance

- This week, only 3 out of 11 major sectoral indices registered a positive return.
- Nifty Pharma registered the highest return among the major sectoral indices, with a gain of +1.40%. The positive return was led by ALKEM, LUPIN, and MANKIND.
- Nifty FMCG posted a positive return of +0.67% this week. COLPAL, UNITDSPR, and HINDUNILVR were the major contributors to the index.
- For the second consecutive week, Nifty Media registered a positive return of +0.06%, led by TIPSINDLTD and NETWORK18.
- Nifty Auto registered a return of -1.43% this week. BALKRISIND and APOLLOTYRE led to a negative return.
- Nifty Bank posted a negative return of -1.69% this week. BANDHANBNK, PNB, and INDUSINDBK were the top draggers in the index.
- Nifty IT posted a negative return for the second consecutive week; the index was down by -1.73%, led by INFY, LTTS, and COFORGE.
- Nifty Energy was down by -2.52%. The top draggers of the index were TATAPOWER and ADANIENSOL.



Source: NSE, INVES 21 Research

## Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

## FII and DII Activity

FII showed an outflow of ₹-19,139.76 crore this week. The week ending Aug 03 saw an outflow of ₹-12,756.26 crore. DII showed net buying of ₹20,871.10 crore this week. DIIs had a net buying of ₹17,226.06 crore last week.

| Participant | Amount (Cr.) |
|-------------|--------------|
| FII         | -19,139.76   |
| DII         | 20,871.10    |

Data: Cash Market; Source: NSE, NSDL

## Economic Events

On Thursday, the Reserve Bank of India Monetary Policy (RBI MPC) kept the repo rate unchanged at 6.5% for the ninth time in a row due to the slower pace of the disinflation rate. The MPC had last changed the interest rate in February 2023. RBI retained its real GDP growth forecast for FY25 at 7.2%, and the retail inflation projection also retained at 4.5% for FY25. RBI further mentioned that the global economic outlook remains resilient with some moderation in pace, domestic economic activity continues to sustain its momentum, and the current account deficit is manageable. Forex reserves rose to an all-time high of \$675 billion, and the rupee remained range-bound in FY25 so far.

The HSBC India Services Purchasing Managers' Index (PMI), compiled by S&P Global, eased to 60.3 in July, down from 60.5 in June. The index had previously hit a six-month peak of 61.8 in January 2024. This slowdown in services growth reflects a similar easing in the manufacturing PMI, which declined to 58.1 in July from 58.3 in June. However, the latest services PMI fell short of HSBC's forecast of 61.1, as indicated in its Flash Services PMI Business Activity Index for July.

## Nifty Pivot Levels

| S2       | S1       | Pivot    | R1       | R2       |
|----------|----------|----------|----------|----------|
| 23,700.9 | 24,034.2 | 24,227.0 | 24,560.3 | 24,753.0 |

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

| Stocks     | Change |
|------------|--------|
| EICHERMOT  | 3.33%  |
| UPL        | 3.16%  |
| CIPLA      | 3.01%  |
| HINDUNILVR | 2.03%  |
| BRITANNIA  | 1.65%  |

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

| Stocks     | Change |
|------------|--------|
| GRASIM     | -4.79% |
| TATASTEEL  | -4.05% |
| MARUTI     | -3.95% |
| ULTRACEMCO | -3.95% |
| BAJAJFINSV | -3.90% |

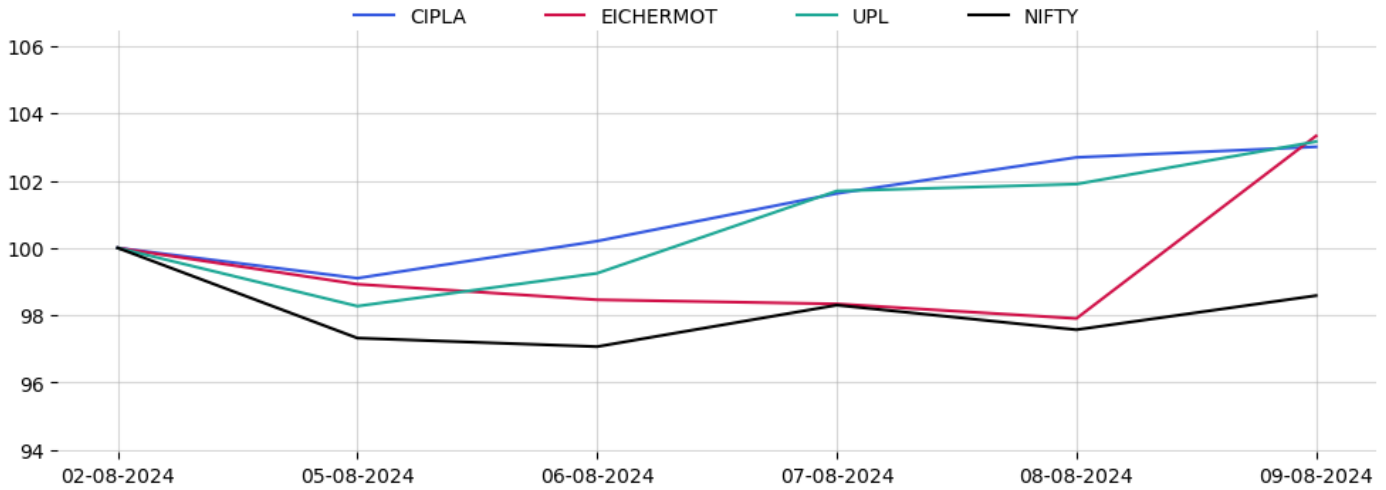
Source: NSE, INVES 21 Research

## Volume Busters

| Stocks    | Volumes     |
|-----------|-------------|
| TATASTEEL | 5,59,97,122 |
| ONGC      | 3,47,84,778 |
| NTPC      | 2,13,18,263 |

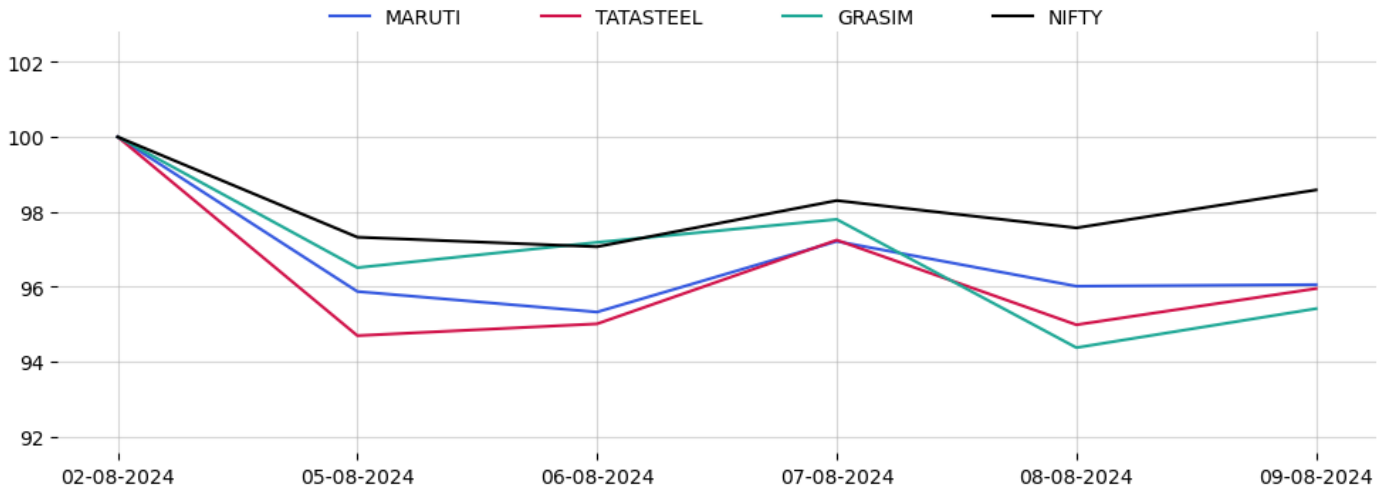
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



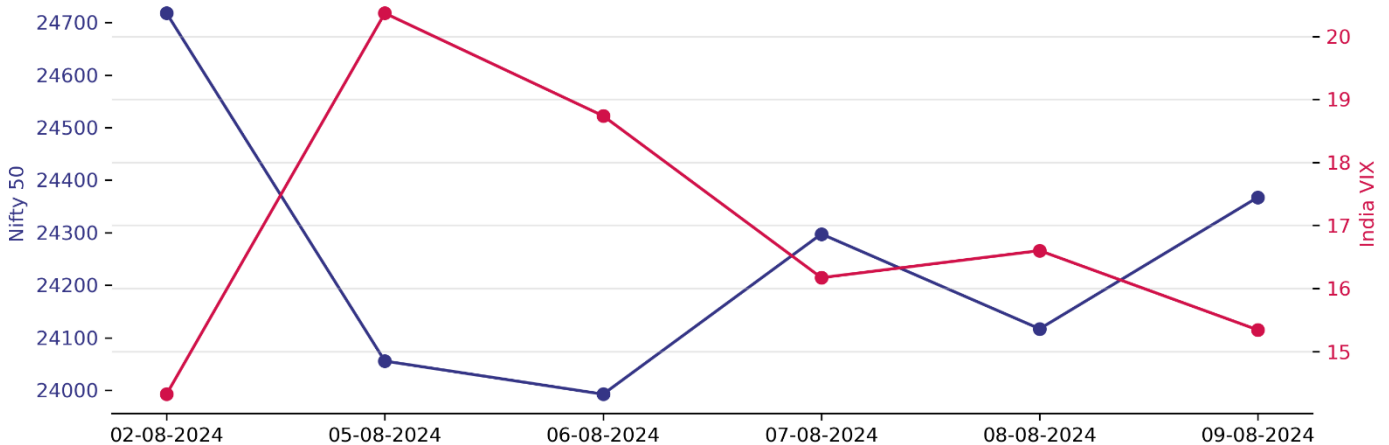
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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