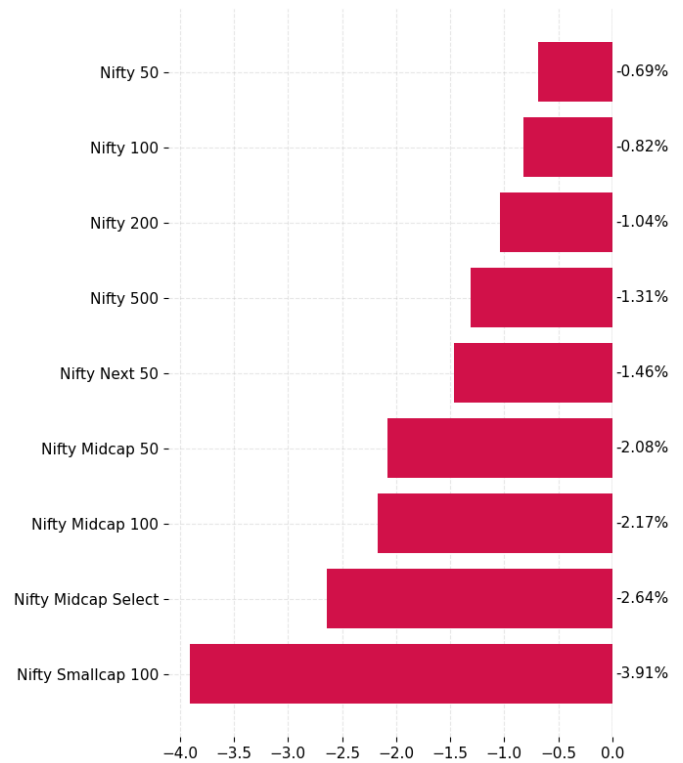


## Indices Performance

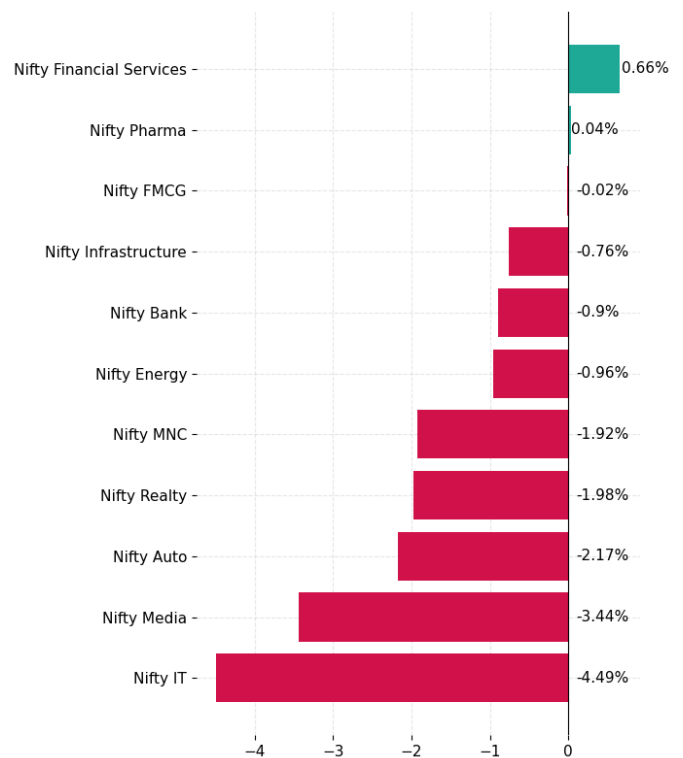
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -0.69% this week. The IT, Media and Auto sectors contributed significantly to the index fall.
- Nifty 100 registered a -0.82% negative return this week. The top losers in the index were INDUSINDBK, ZOMATO, and NAUKRI.
- Nifty Next 50 registered a negative return of -1.46% this week. LODHA, LTIM, and IBFC were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -2.64% and -2.08%, respectively. The top contributors to the midcap index fall were AUBANK, IDEA, and IDFCFIRSTB.
- The Nifty Smallcap 100 index posted a negative return of -3.91% this week, led by FSL, SWSOLAR, and 360ONE.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 14:36, significantly down from last week's ADR of 39:11.



Source: NSE, INVES 21 Research

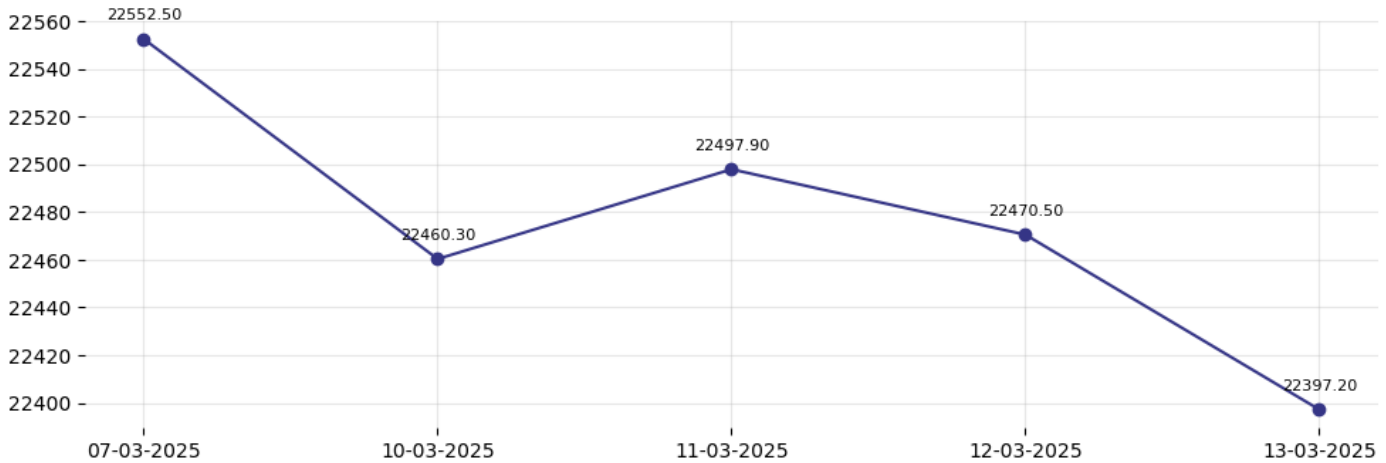
## Sectoral Performance

- This week, 9 out of 11 major sectoral indices posted a negative return.
- Nifty Financial Services registered a positive return of 0.66%. BAJFINANCE, ICICIPRULI, and SBILIFE led to positive returns in the index.
- Nifty FMCG posted a slight negative return of -0.02% this week. COLPAL, NESTLEIND, and TATACONSUM were major contributors to the index.
- Nifty Bank registered a negative return of -0.90%, led by INDUSINDBK, AUBANK, and IDFCFIRSTB.
- Nifty Realty posted a negative return of -1.98% this week. The major contributors to the index were MAHLIFE, LODHA, and RAYMOND.
- Nifty Auto posted a negative return of -2.17% this week. EXIDEIND, ASHOKLEY, and MOTHERSON were the top losers in the index.
- Nifty IT posted a negative return this week; the index was down by -4.49%. LTTS, INFY, and WIPRO 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 ₹-5,729.68 crore this week. The week ending Mar 7 saw an outflow of ₹-15,501.57 crore. DII showed a net buying of ₹5,499.47 crore this week. DIIs had a net buying of ₹20,950.89 crore last week.

Participant	Amount (Cr.)
FII	-5,729.68
DII	5,499.47

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's retail inflation dropped to 3.61% in February, the lowest in seven months and below the RBI's 4% target, mainly due to a decline in food prices. Vegetable prices fell by 1.07% compared to a sharp rise of 11.35% in January, while prices of pulses also saw a slight dip. Cereals and related products grew slower than 6.1% compared to 6.24% in the previous month. This lower-than-expected inflation, down from 4.31% in January, reflects easing price pressures in key food categories.

According to government data, India's industrial production grew by 5.0% in January, up from 3.5% in December 2024. The manufacturing sector led the growth with a 5.5% increase, while mining output saw a slight dip at 4.4%. Power generation rose by 2.4%. The overall rise in industrial output, as measured by the Index of Industrial Production (IIP), indicates strengthening economic activity.

SIP inflows into mutual funds fell to a three-month low of ₹25,999 crore in February, down from ₹26,400 crore in January and ₹26,459 crore in December, amid increased market volatility.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,100.8	22,249.0	22,462.9	22,611.1	22,824.9

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
SUNPHARMA	4.61%
ICICIBANK	2.92%
KOTAKBANK	2.57%
ITC	2.02%
BEL	1.67%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
INDUSINDBK	-28.23%
WIPRO	-7.30%
INFY	-6.30%
TECHM	-3.46%
HEROMOTOCO	-3.38%

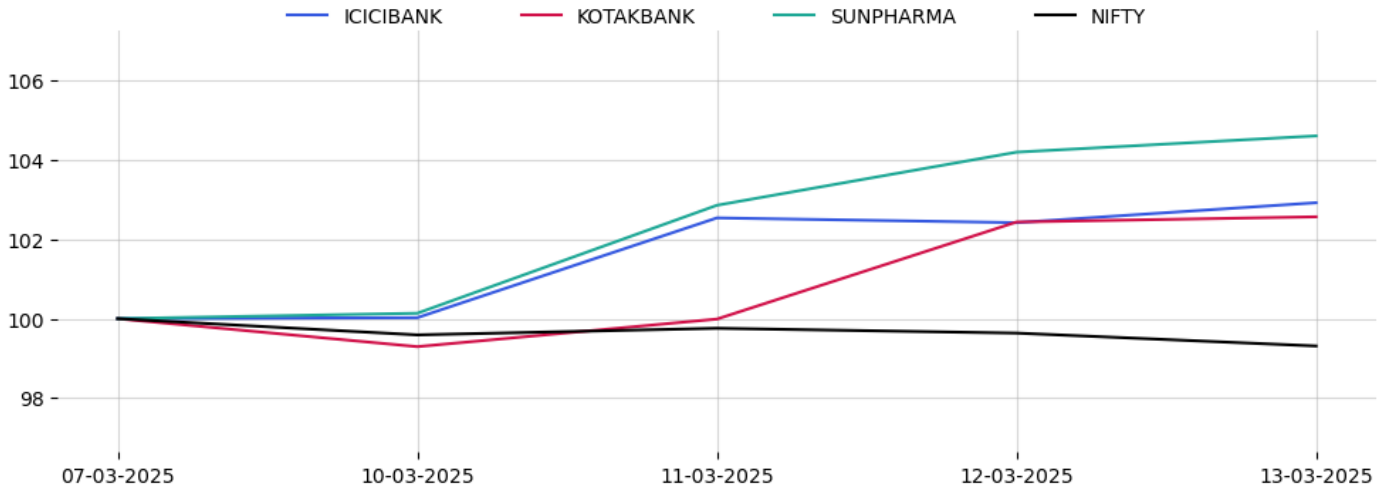
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
INDUSINDBK	5,30,18,738
TATASTEEL	4,93,68,941
BEL	2,41,65,801

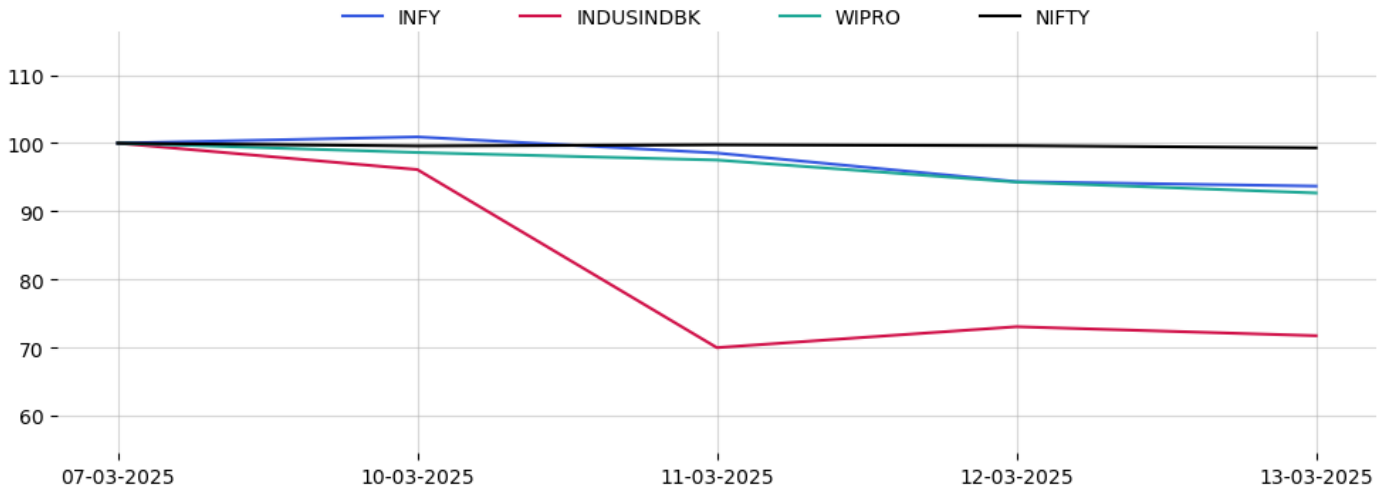
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



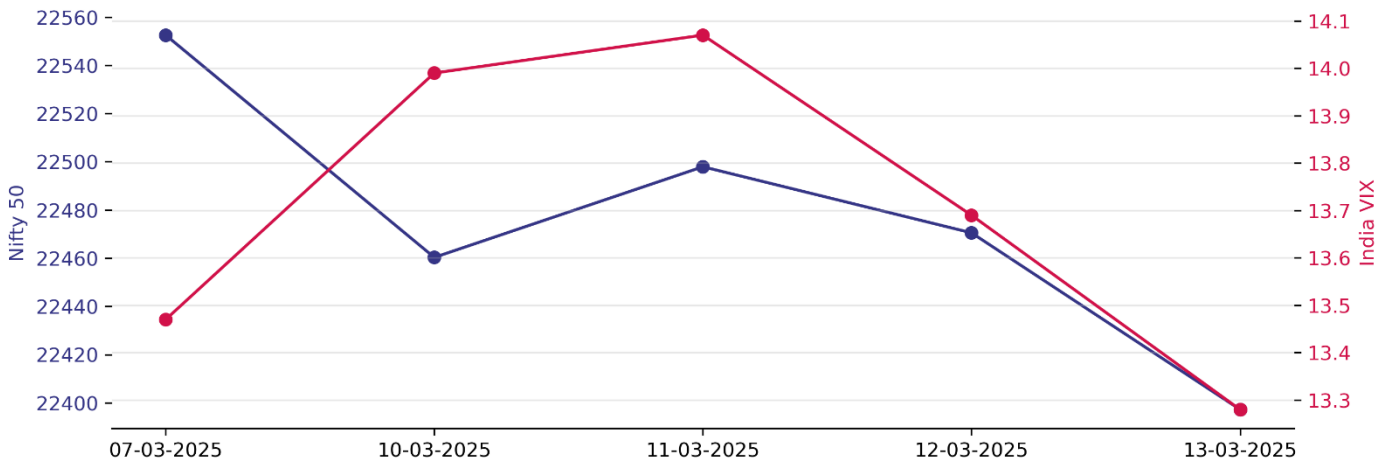
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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