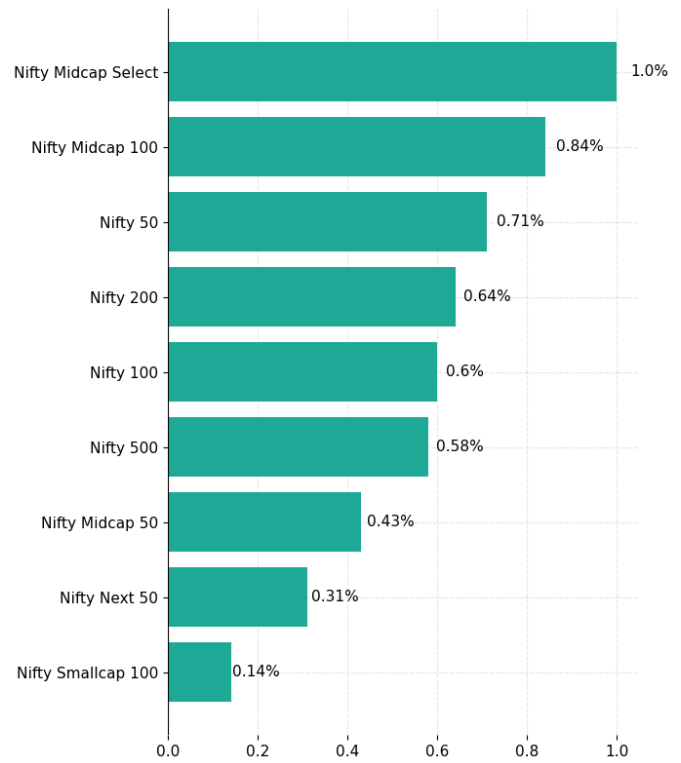


## Indices Performance

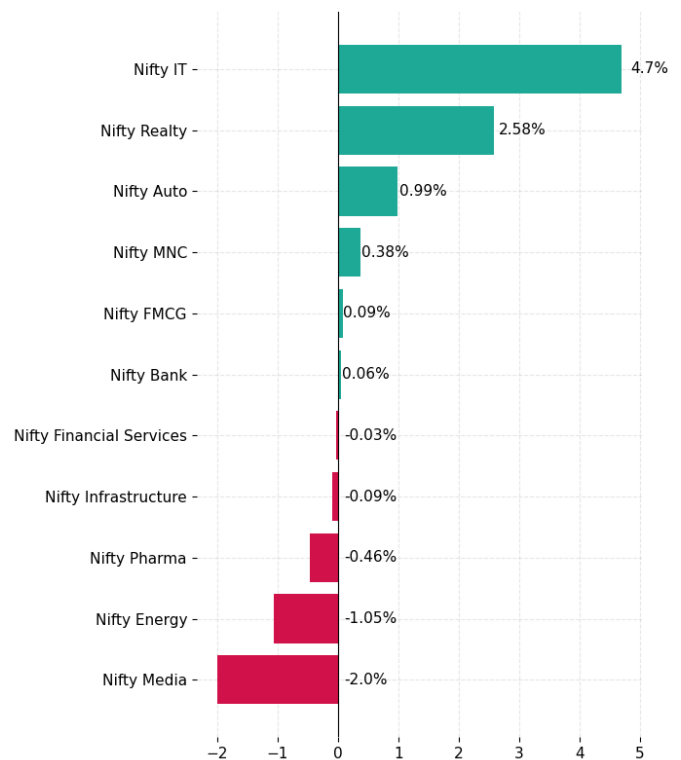
- This week, all the major indices posted a positive return. However, last week, all major indices registered a negative return.
- The Nifty 50 index was up by +0.71% this week. Major contributors were the IT, Realty, and Auto sectors.
- Nifty 100 registered a +0.60% positive return this week. The top contributors to the index were TECHM, WIPRO, and INFY.
- Nifty Next 50 registered a return of +0.31% this week. SIEMENS, DLF, and HAVELLS were the top contributors to the index.
- Nifty Midcap Select and Nifty Midcap 100 posted were the top gainers among the major indices. The indices posted a positive return of +1.0% and +0.84%, respectively.
- The Nifty Smallcap 100 index posted a return of +0.14% this week, led by the CDSL, FSL and BLUESTARCO.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 27:23, up from last week's ADR of 14:36.



Source: NSE, INVES 21 Research

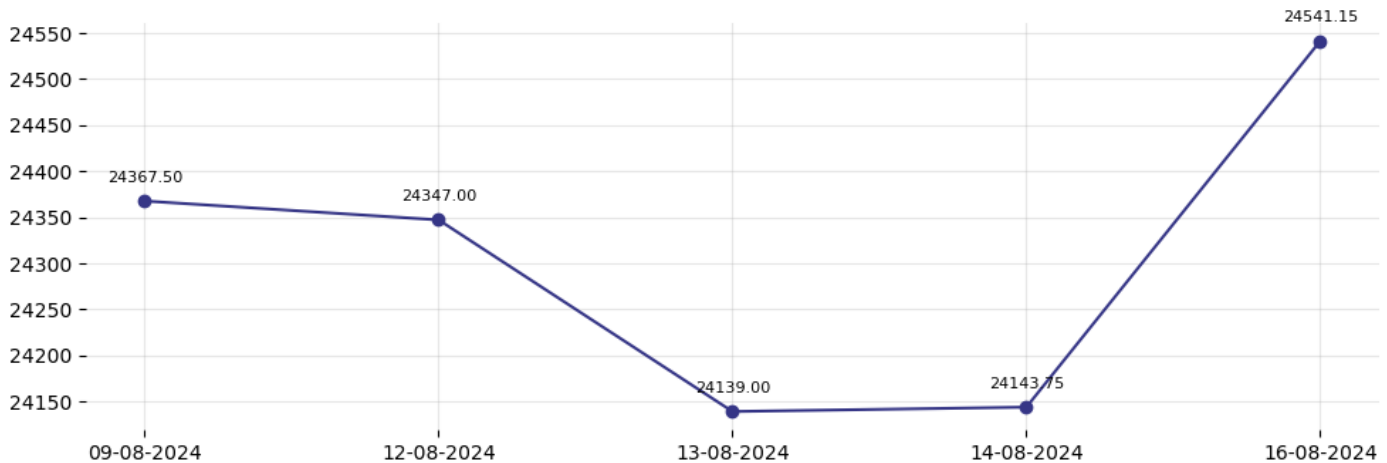
## Sectoral Performance

- This week, only 6 out of 11 major sectoral indices registered a positive return.
- Nifty IT registered the highest return among the major sectoral indices, with a gain of +4.70%. The positive return was led by MPHASIS, LTT, and TECHM.
- Nifty Realty posted a positive return of +2.58% this week. PRESTIGE, MAHLIFE, and DLF were the major contributors to the index.
- Nifty Auto registered a positive return of +0.99%, led by M&M and TATAMOTORS.
- For the second consecutive week, Nifty FMCG registered a return of +0.09% this week. BALRAMCHIN and COLPAL led to a positive return.
- Nifty Pharma posted a negative return of -0.46% this week. ZYDUSLIFE, DIVISLAB, and GLAND were the top draggers in the index.
- Nifty Energy posted a negative return for the second consecutive week; the index was down by -1.05%, led by COALINDIA, NTPC, and POWERGRID.
- Nifty Media was down by -2.00%. The top draggers of the index were SUNTV, and NETWORK18.



Source: NSE, INVES 21 Research

## Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

## FII and DII Activity

FII showed an outflow of ₹-8,616.43 crore this week. The week ending Aug 10 saw an outflow of ₹-19,139.76 crore. DII showed net buying of ₹10,560.08 crore this week. DIIs had a net buying of ₹20,871.10 crore last week.

Participant	Amount (Cr.)
FII	-8,616.43
DII	10,560.08

Data: Cash Market; Source: NSE, NSDL

## Economic Events

On Monday, the Ministry of Statistics (MOSPI) released the Consumer Price Index (CPI) data. Inflation for the month of Jul 2024 decreased to 3.54%. In the last 59 months, this is the lowest retail inflation. Moreover, the data suggest that the Consumer Food Price Index (CFPI) has reached the lowest levels in the month of July 2024 since June 2023. Food inflation fell to 5.4% in July, compared to 9.4% in June 2024.

On Wednesday, the Ministry of Commerce and Industry released the Wholesale Price Index (WPI) data. Wholesale inflation for the month of July 2024 decreased to 2.04%, marking the lowest level in the last three months. A significant factor contributing to the decline was the drop in food inflation, which fell to 3.55% in July, down from 8.68% in June and 7.75% in May.

India's exports contracted in July 2024, after a gap of three months, fell by 1.48% to \$33.98 billion. This contraction was primarily driven by the muted global demand. Meanwhile, the imports surged by 7.46% to \$57.48 billion, leading to a nine-month high trade deficit of \$23.5 billion.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,937.4	24,239.3	24,401.6	24,703.5	24,865.8

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
TECHM	5.22%
WIPRO	5.08%
INFY	4.98%
HCLTECH	4.92%
TCS	4.43%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
DIVISLAB	-4.06%
DRREDDY	-3.14%
NTPC	-3.07%
ADANI PORTS	-2.63%
ADANI ENT	-2.47%

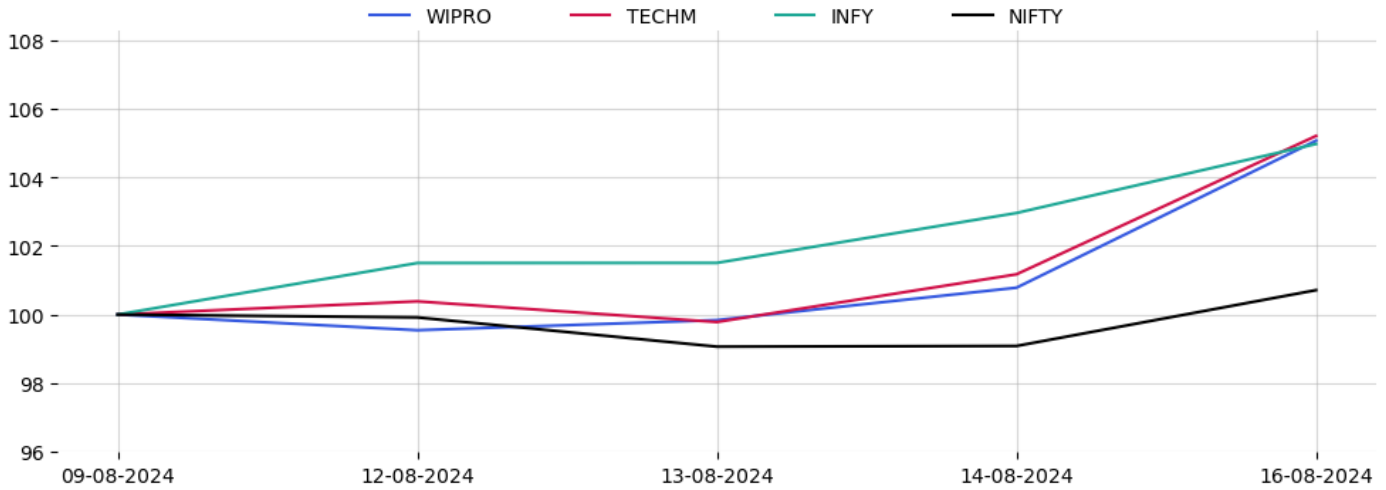
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	4,70,52,515
ONGC	2,55,80,910
HDFCBANK	1,80,19,708

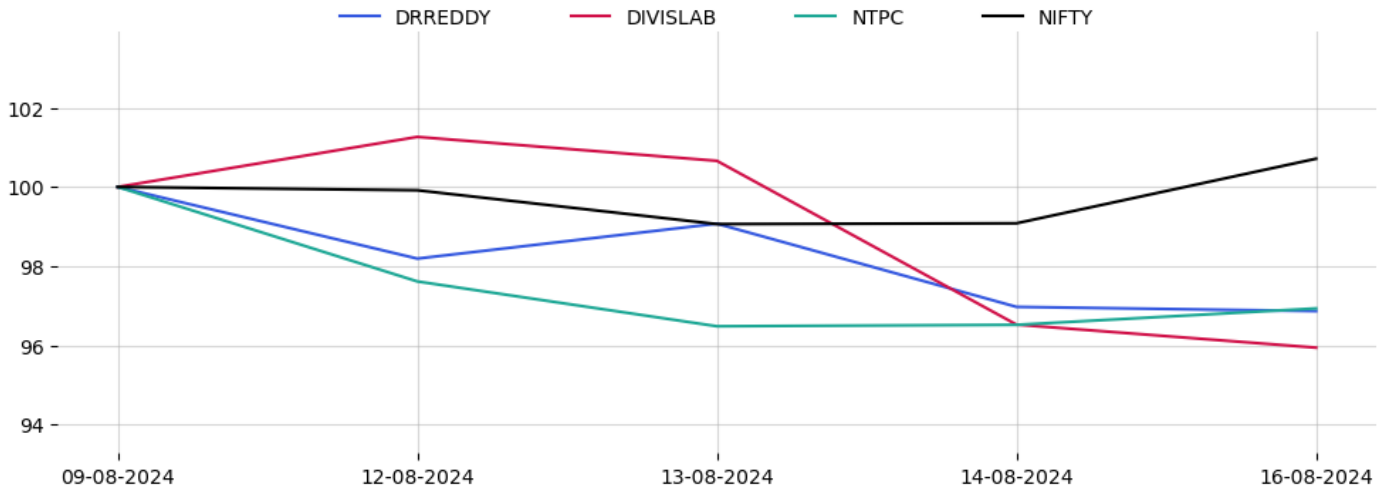
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



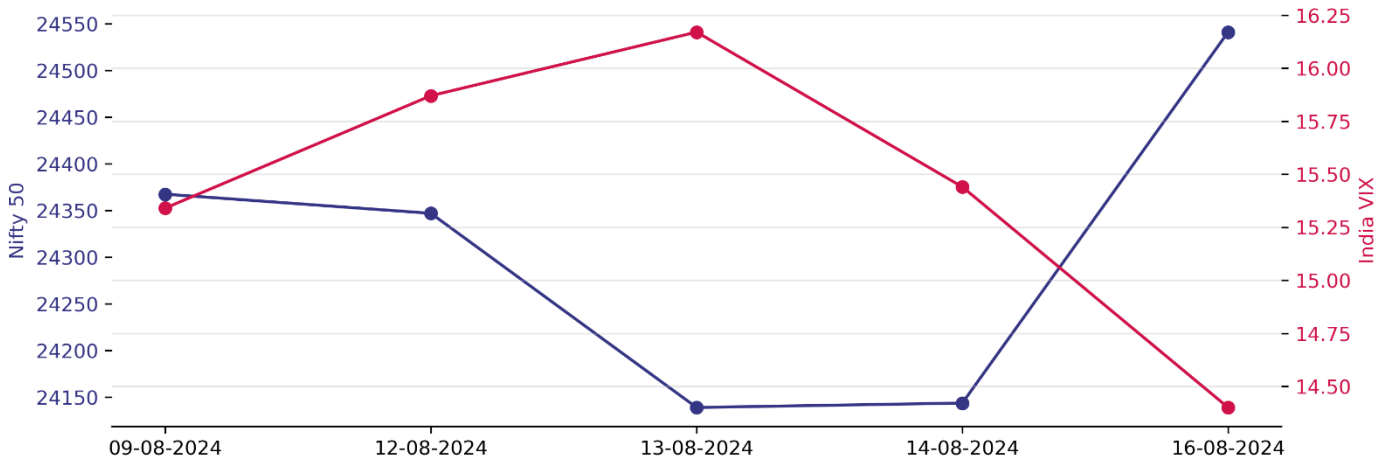
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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