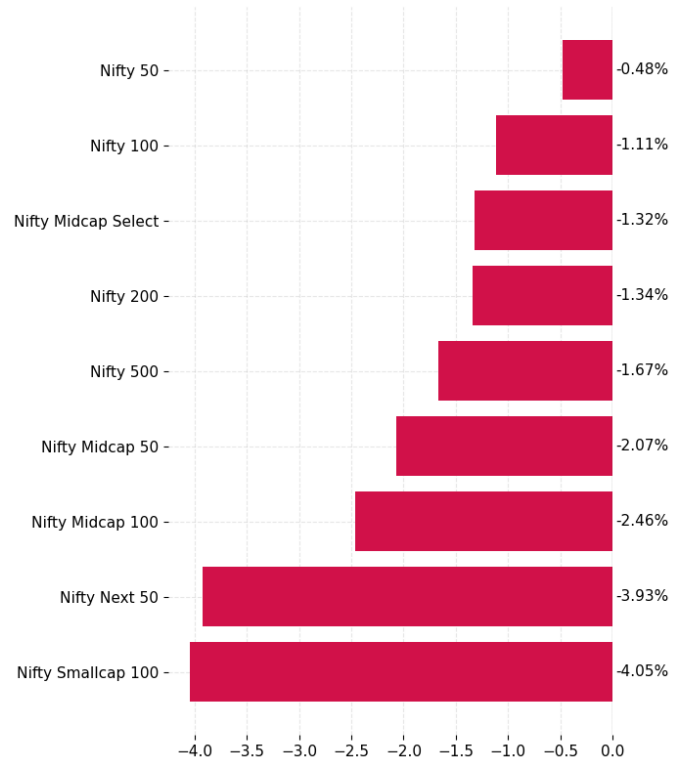


## Indices Performance

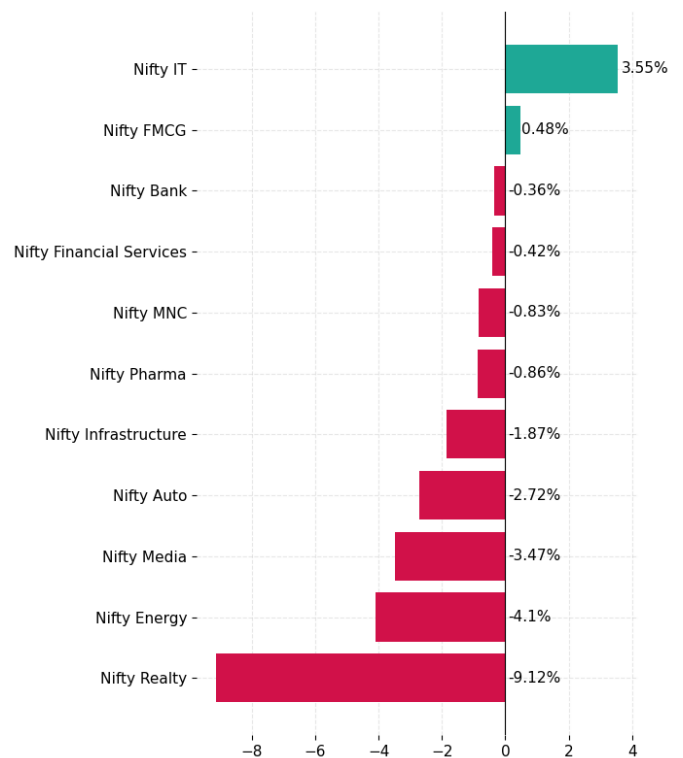
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -0.48% this week. The Realty, Energy, and Media sectors were significant draggers to the index.
- Nifty 100 registered -1.11% negative return this week. The top draggers to the index were TRENT, ZOMATO, and JIOFIN.
- Nifty Next 50 registered a negative return of -3.93% this week. ICICIPRULI, RECLTD, and DLF were the top draggers to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -1.32% and -2.07%, respectively. The top losers in the midcap index were POLYCAB, GODREJPROP, and VOLTAS.
- The Nifty Smallcap 100 index posted a negative return of -4.05% this week, led by CYIENT, RKFORGE, and NAM-INDIA.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 22:28, the same as last week's ADR of 22:28.



Source: NSE, INVES 21 Research

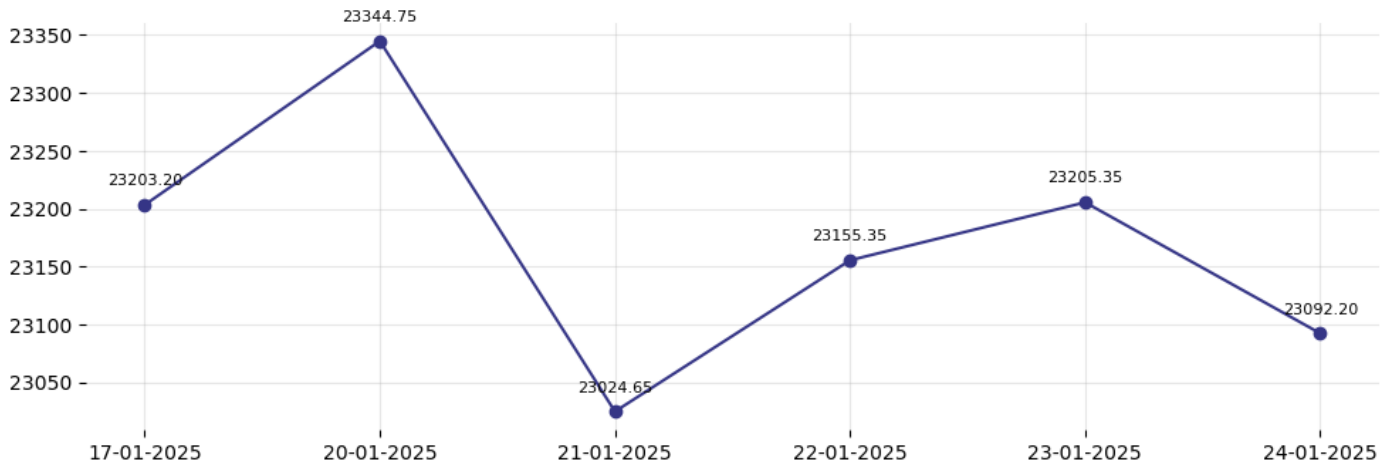
## Sectoral Performance

- This week, 9 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 3.55%. WIRPO, COFORGE, and MPHASIS led to positive returns in the index.
- Nifty FMCG posted a positive return of 0.48% this week. UBL, BRITANNIA, and TATACONSUM were major contributors to the index.
- Nifty Bank registered a negative return of -0.36%, led by AXISBANK, SBIN, and PNB.
- Nifty Auto posted a negative return of -2.72% this week. The major draggers in the index were APOLLOTYRE, TATAMOTORS, and MOTHERSON.
- Nifty Energy posted a negative return of -4.10% this week. ADANIPOWER, ADANIGREEN, and RELIANCE were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -9.12%. PRESTIGE, SOBHA, and OBEROIRLTLY 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 ₹-22,504.08 crore this week. The week ending Jan 18 saw an outflow of ₹-25,218.60 crore. DII showed a net buying of ₹17,577.36 crore this week. DIIs had a net buying of ₹25,151.27 crore last week.

Participant	Amount (Cr.)
FII	-22,504.08
DII	17,577.36

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's private sector growth slowed in January 2025, with the HSBC Flash India Composite Output Index dropping to 57.9 from 59.2 in December, marking the slowest expansion in 14 months, according to data from S&P Global. While the manufacturing sector gained momentum, with the Manufacturing PMI rising to 58.0 from 56.4—the strongest performance since July 2024—the services sector decelerated, as its Business Activity Index fell to 56.8 from 59.3. Rising cost pressures also led to higher prices for goods and services during the month.

India's forex reserves declined by \$1.88 billion to \$623.98 billion, according to the Reserve Bank of India (RBI). This marks a continued downward trend attributed to revaluation and RBI's forex market interventions to stabilize the rupee. Foreign currency assets, a significant component of the reserves, fell by \$2.87 billion to \$533.13 billion. However, gold reserves rose by \$1.06 billion to \$68.94 billion, and Special Drawing Rights (SDRs) increased marginally by \$1 million to \$17.78 billion. India's reserve position with the IMF dipped by \$74 million to \$4.12 billion.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,715.7	22,903.9	23,165.1	23,353.4	23,614.6

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
WIPRO	13.53%
KOTAKBANK	7.26%
ULTRACEMCO	6.67%
BRITANNIA	5.09%
GRASIM	4.84%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TRENT	-11.68%
SBILIFE	-6.50%
DRREDDY	-6.49%
ADANI PORTS	-5.96%
TATAMOTORS	-5.85%

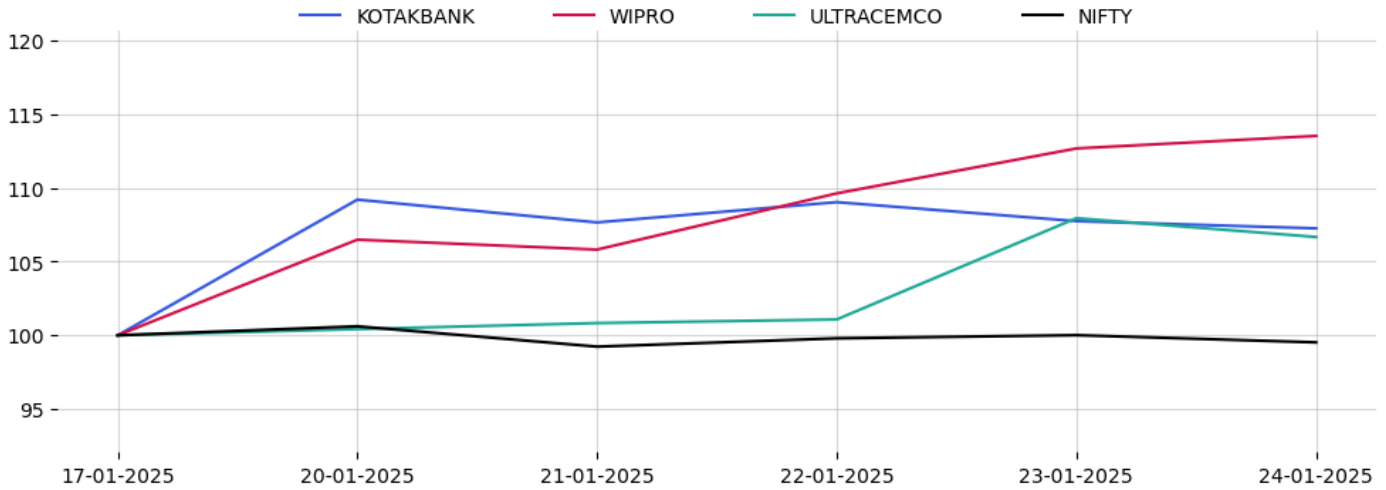
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	2,75,92,050
WIPRO	2,54,33,645
AXISBANK	2,25,90,202

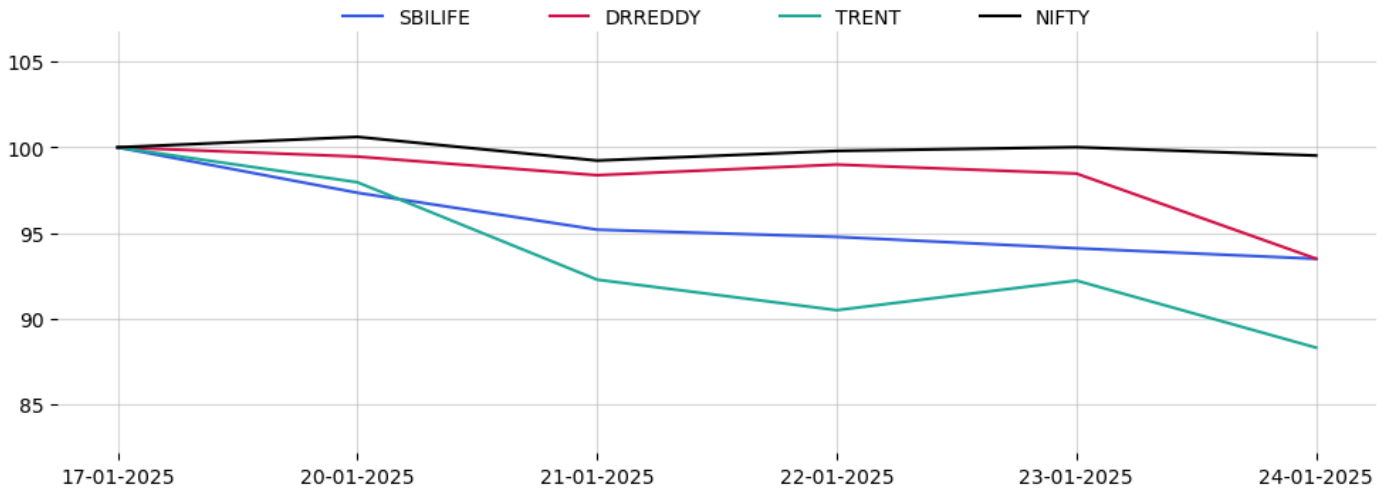
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



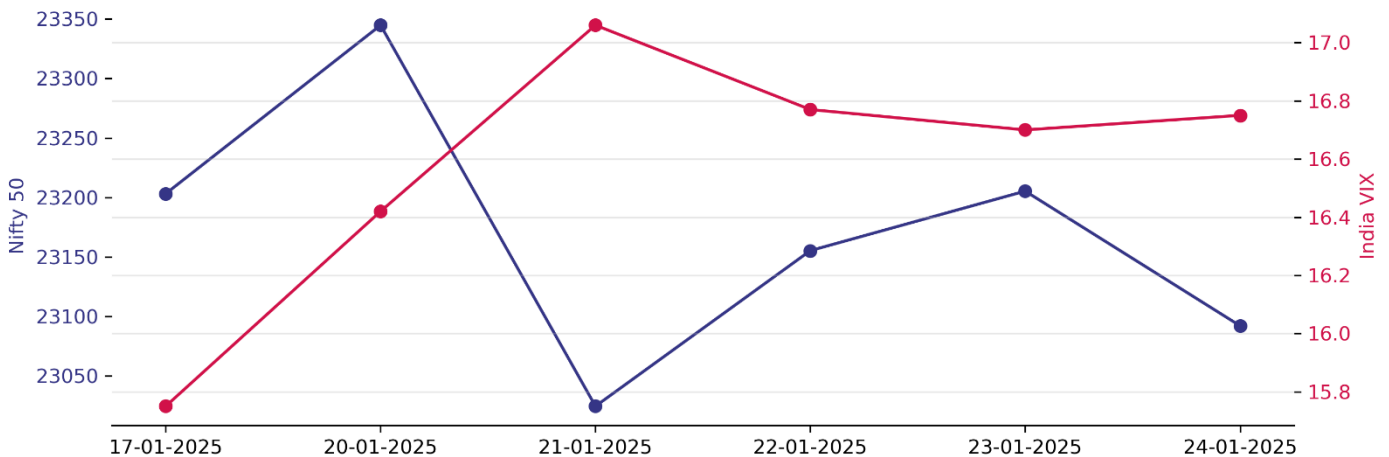
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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