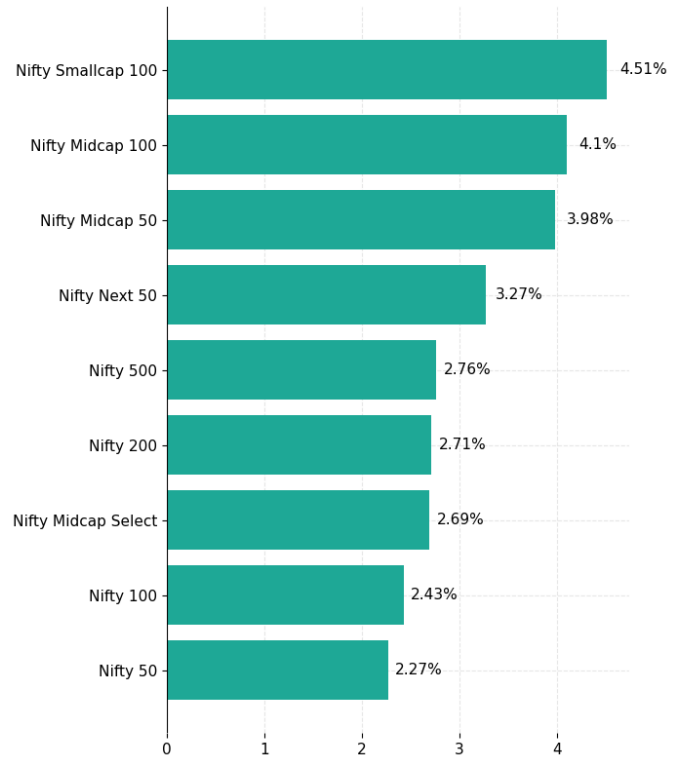


Indices Performance

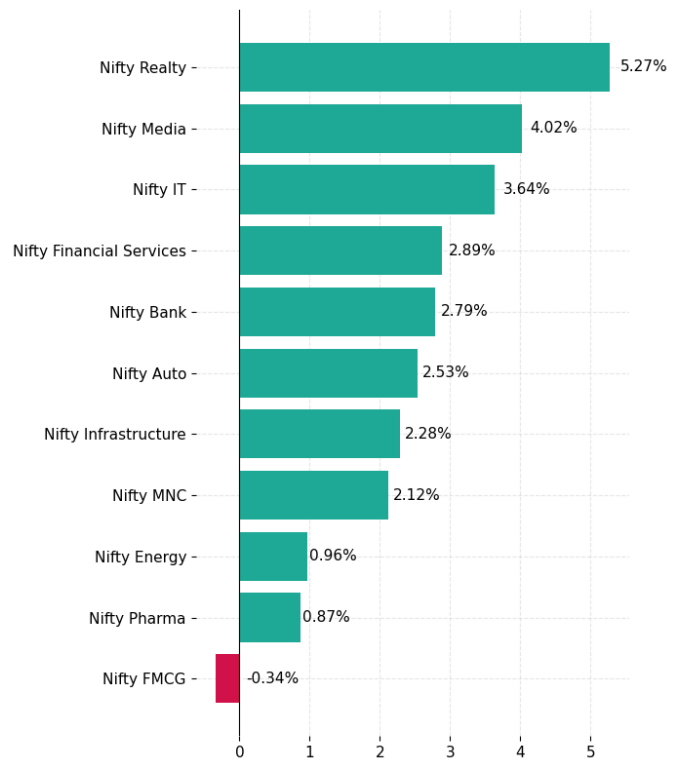
- For the second consecutive week, all major market indices posted a positive return.
- The Nifty 50 index was up by 2.27% this week. The Realty, Media, Banking, and IT sectors were the significant contributors to the index.
- Nifty 100 registered a 2.43% positive return this week. The top contributors to the index were ADANIENSOL, ADANIGREEN, and ATGL.
- Nifty Next 50 registered a return of 3.27% this week. VEDL, LICJ, and ZOMATO were the major contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 2.69% and 3.98%, respectively. The top contributors to the midcap index were DIXON, INDUSTOWER, and PERSISTENT.
- The Nifty Smallcap 100 index posted a positive return of 4.51% this week, led by GRSE, ZEEL, and HBLPOWER.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 39:11, significantly down from last week's ADR of 27:23.



Source: NSE, INVES 21 Research

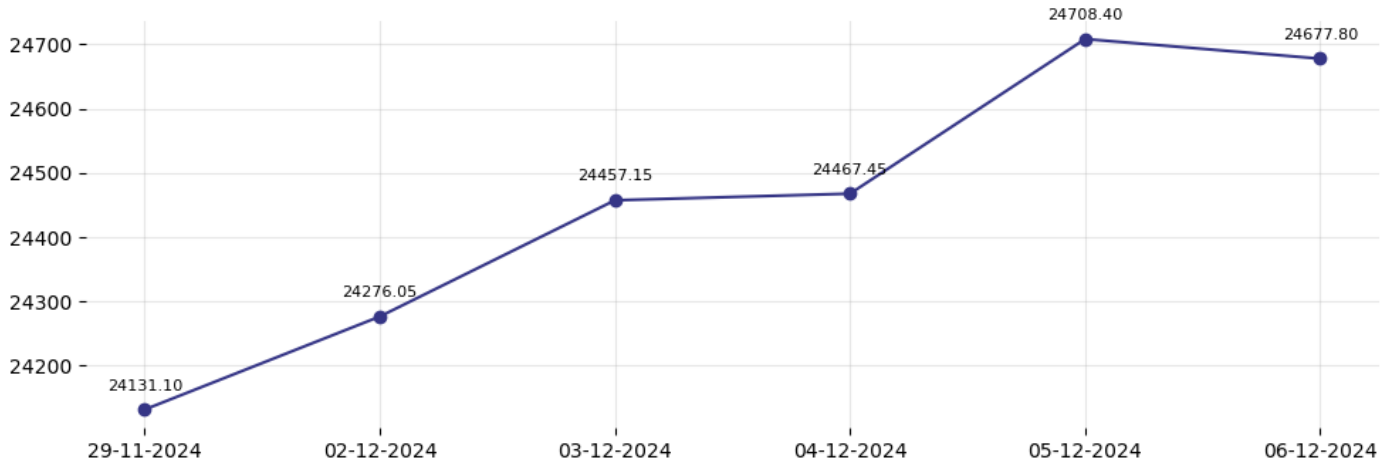
Sectoral Performance

- This week, all the major sectoral indices posted a positive return, except for the index Nifty FMCG.
- Nifty Realty registered the highest positive return among the major sectoral indices, with a return of 5.27%. LODHA, PHOENIXLTD, and OBEROIRLTY led to positive returns in the index.
- Nifty IT posted a positive return of 3.64% this week. PERSISTENT, TECM, and TCS were significant contributors to the index.
- Nifty Bank registered a positive return of 2.79%, led by the BANKBARODA, CANBK, and AXISBANK.
- Nifty Auto posted a positive return of 2.53% this week. The top contributors to the index were APOLLOTYRE, MOTHERSON, and MRF.
- Nifty Pharma posted a positive return of 0.87% this week. LAURUSLABS, GLAND, and NATCOPHARM were the top gainers in the index.
- Nifty FMCG posted a negative return this week; the index was up by -0.34%. RADICO, MARICO, and BRITANNIA 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 inflow of ₹11,933.59 crore this week. The week ending Nov 29 saw an outflow of ₹-5,026.77 crore. DII showed a net buying of ₹1,792.41 crore this week. DIIs had a net buying of ₹6,924.78 crore last week.

Participant	Amount (Cr.)
FII	11,933.59
DII	1,792.41

Data: Cash Market; Source: NSE, NSDL

Economic Events

The Reserve Bank of India (RBI), in its fifth bi-monthly monetary policy meeting for FY25 on December 6, 2024, kept the repo rate unchanged at 6.5% for the eleventh consecutive time, with the Monetary Policy Committee (MPC) maintaining a neutral stance. The MPC, led by Governor Shaktikanta Das, decided by a 4-2 majority to prioritize aligning inflation with the target while supporting growth. Additionally, the Cash Reserve Ratio (CRR) was reduced by 50 basis points to 4%. The RBI revised FY25 GDP growth estimates downward to 6.6% from 7.2% and raised the FY25 CPI inflation target to 4.8% from 4.5%.

GST collections for November surged by 8.5% year-on-year to ₹1.82 trillion, driven by strong festive demand, as per official data released on Sunday. India's manufacturing activity moderated in November, with the HSBC India Manufacturing PMI slipping to 56.5 from 57.5 in October, signaling a slower but still robust expansion (above 50). A notable survey highlight was that manufacturers raised selling prices at the fastest pace since October 2013, supporting operating margins but dampening demand amid pricing pressures and intense competition.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,665.6	24,171.7	24,514.7	25,020.8	25,363.8

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
TITAN	6.81%
APOLLOHOSP	5.92%
ADANIAPORTS	5.80%
ULTRACEMCO	5.77%
DRREDDY	4.28%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
CIPLA	-3.68%
HDFCLIFE	-3.23%
HEROMOTOCO	-2.77%
ASIANPAINT	-2.01%
BHARTIARTL	-1.80%

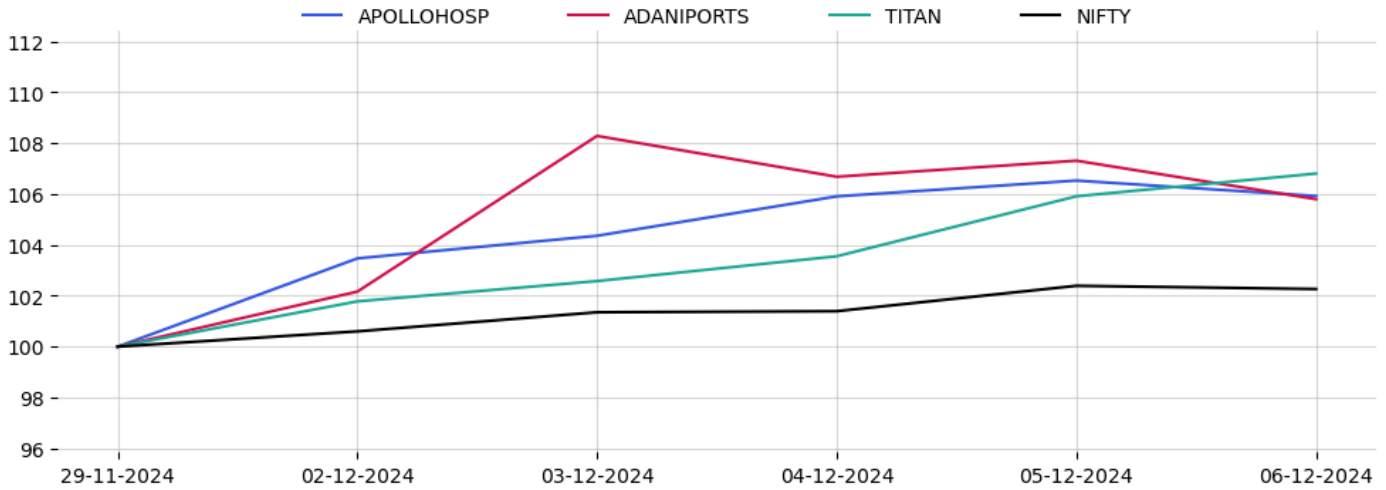
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	32,428,380
POWERGRID	16,589,112
HDFCBANK	15,693,695

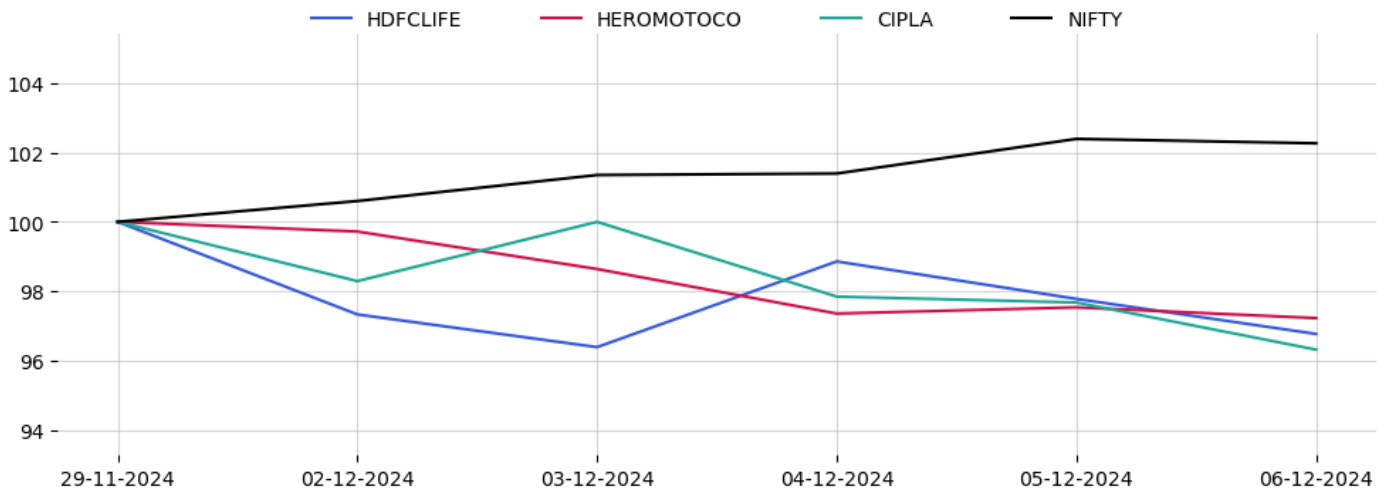
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



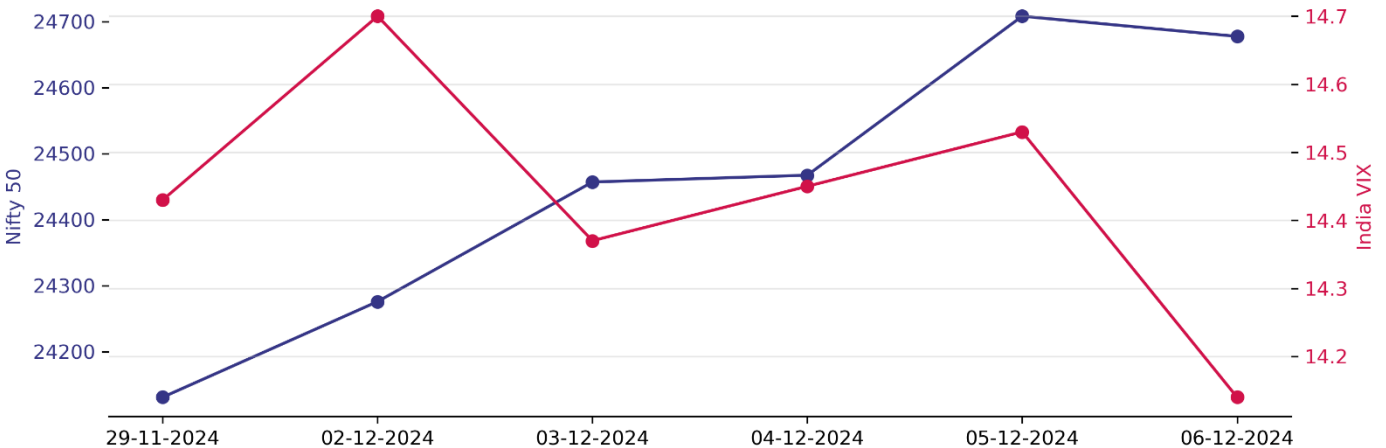
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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