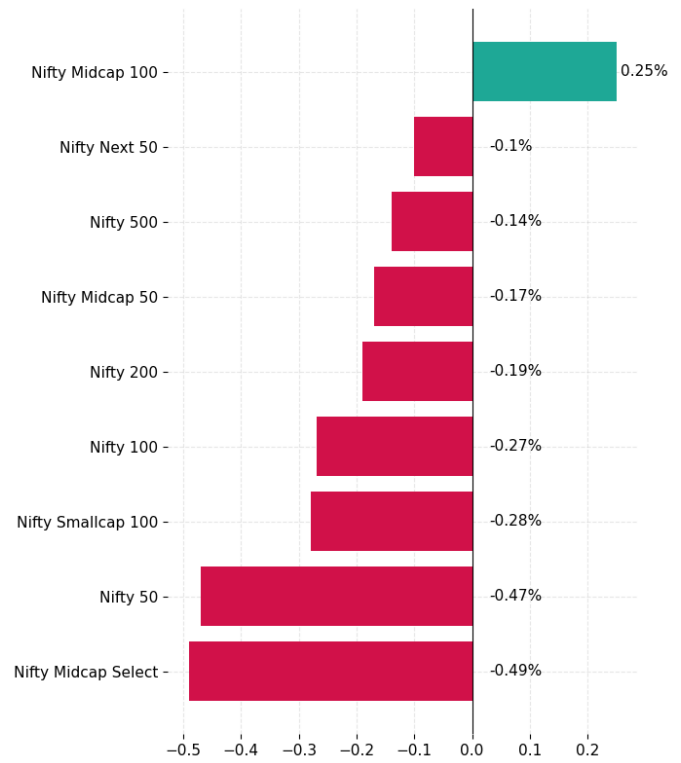


Indices Performance

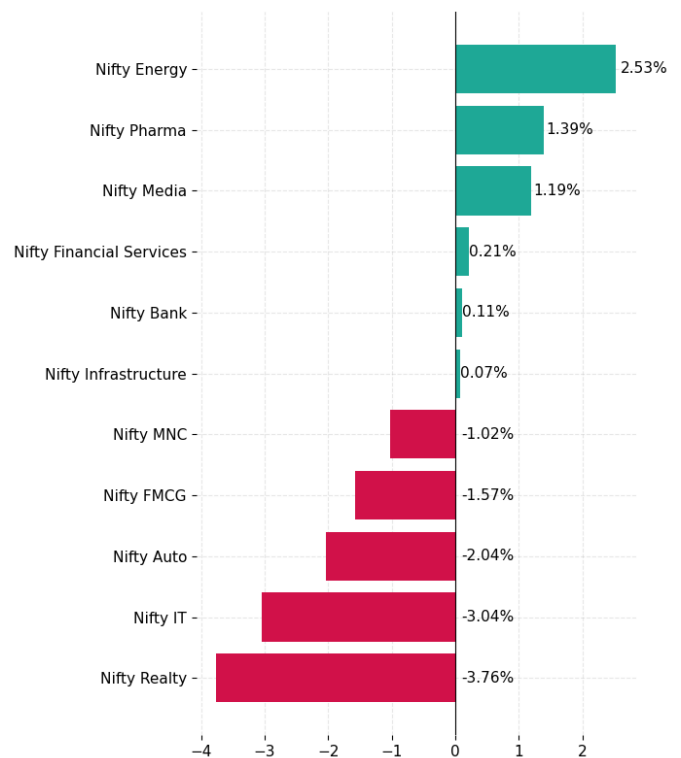
- This week, all major indices registered a negative return, except for the Nifty Midcap 100. However, last week, all the major indices registered a positive return.
- After five continuous weeks of positive gains, Nifty 50 posted a negative return. The index was down by -0.47% this week, led by the IT, Auto, and FMCG sectors.
- Nifty 100 registered a -0.27% negative return this week. The top contributors to the index were ITC and INFY.
- Nifty Next 50 registered a return of -0.1% this week. VBL, AMBUJACEM, and HAL were the top draggers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return after a week of positive return. The indices were down by -0.49% and -0.17%, respectively. However, Nifty Midcap 100 posted a positive return of +0.25% this week.
- The Nifty Smallcap 100 index posted a return of -0.28% this week, led by the BSOFT, and SONATSOFTW.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 0.61, significantly down from last week's ADR of 3.17.



Source: NSE, INVES 21 Research

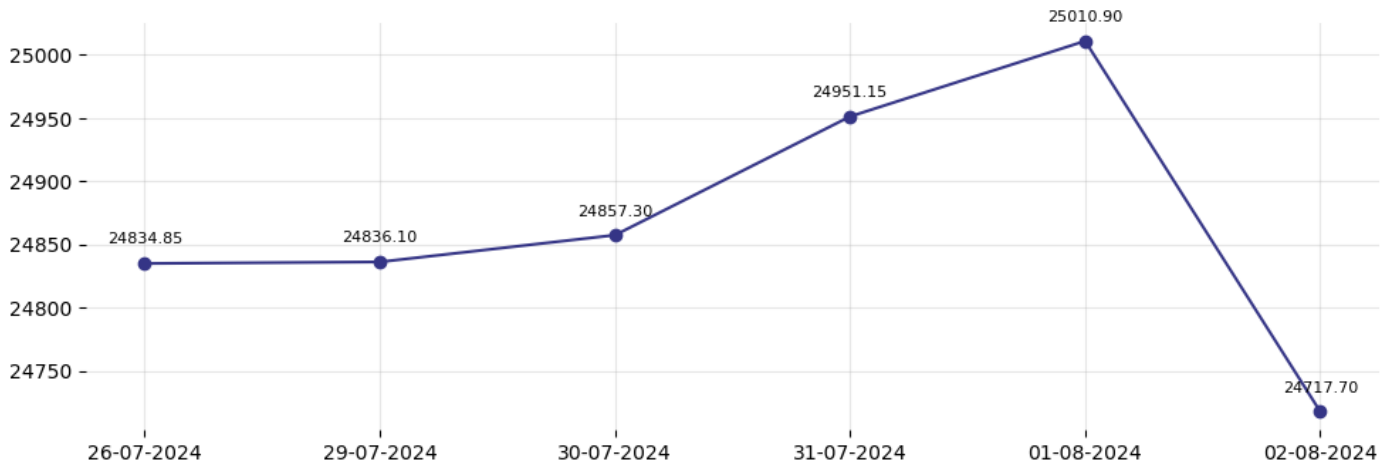
Sectoral Performance

- This week, only 6 out of 11 major sectoral indices registered a positive return.
- Nifty Energy registered the highest return among the major sectoral indices, with a gain of +2.53%. The positive return was led by NTPC, BPCL, and ADANIGREEN.
- Nifty Pharma posted a positive return of +1.39% this week. GRANULES, GLAXO, and DIVISLAB were the major contributors to the index.
- Nifty Media registered a positive return of +1.19%, led by NAZARA, and ZEEL.
- Nifty Bank posted a positive return of +0.11% this week. BANDHANBNK and HDFCBANK were the top gainers in the index.
- Nifty Realty posted a negative return this week, the index was down by -3.76%. BRIGADE and GODREJPROP were the major contributors.
- Nifty IT was down by -3.04%. The top draggers of the index were COFORGE, PERSISTENT, and WIPRO.
- Nifty Auto registered a return of -2.04% this week, EICHERMOT and MARUTI led the negative return.



Source: NSE, INVES 21 Research

Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an outflow of ₹-12,756.26 crore this week. The week ending July 27 saw an outflow of ₹-4,721.26 crore. DII showed a net buying of ₹17,226.06 crore this week. DIIs had a net buying of ₹8,109.78 crore last week.

Participant	Amount (Cr.)
FII	-12,756.26
DII	17,226.06

Data: Cash Market; Source: NSE, NSDL

Economic Events

HSBC's final India Manufacturing Purchasing Managers Index (PMI), compiled by S&P Global, stood at 58.1 in July and recovered in June to 58.3, after hitting a three-month low of 57.5 in May 2024. The final PMI Index in July 2024 was slightly lower than the flash expectations of 58.5. The report said, "Domestic demand was underscored by healthy growth in both new orders and outputs, although the sub-indexes fell slightly from June." Further, the report highlighted, "Exports rose at the second-fastest pace in 13 years due to strengthening international demand from regions such as Asia, Europe, North America and Middle East."

GST collection for July 2024 stood at INR 1.82 trillion, up by 10.3% YoY, according to data released by the finance ministry. In the month of June 2024, the GST collection was INR 1.74 trillion, while the July GST collection was down from the record of INR 2.1 trillion in the month of April 2024. At the net level, GST collections rose by 14.4% MoM, with the refunds of INR 16,283 crores adjusted. The collection is likely to increase in the coming months due to the festive season.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,436.2	24,576.9	24,827.6	24,968.4	25,219.1

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
NTPC	5.90%
BPCL	5.57%
ASIANPAINT	5.31%
DIVISLAB	4.83%
POWERGRID	4.08%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
EICHERMOT	-5.70%
LTIM	-4.81%
GRASIM	-4.80%
M&M	-4.78%
WIPRO	-4.32%

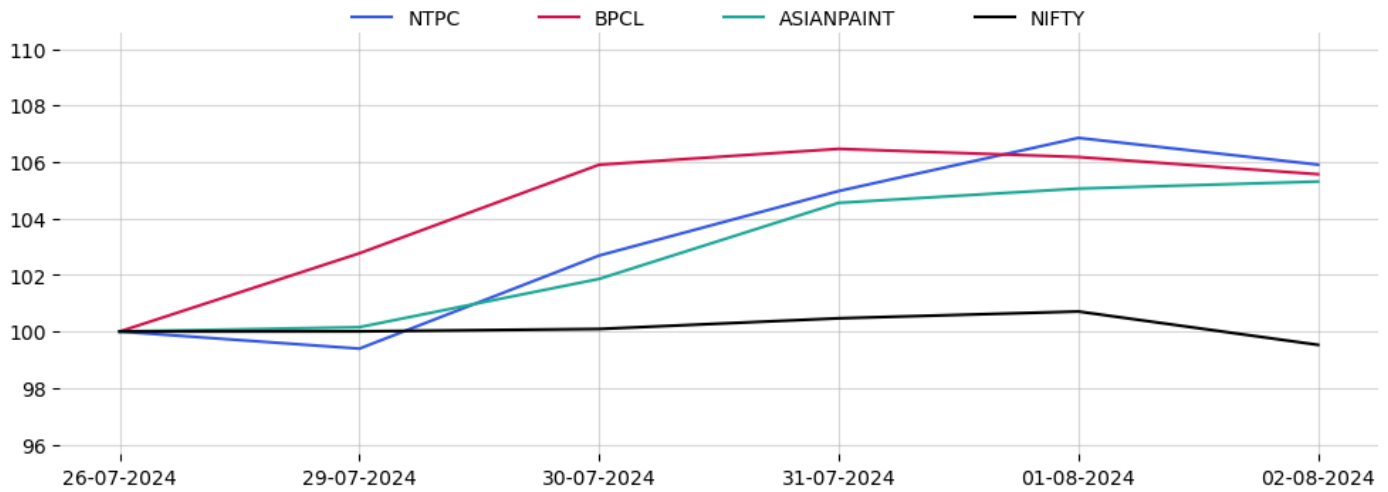
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	6,06,26,710
NTPC	2,75,57,420
ONGC	2,54,32,621

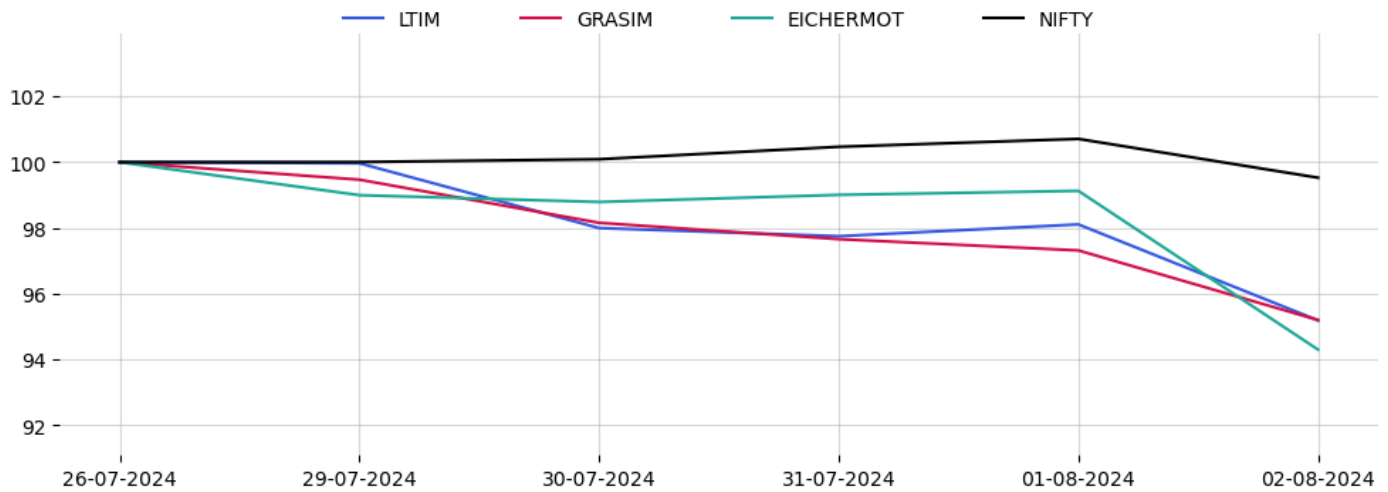
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



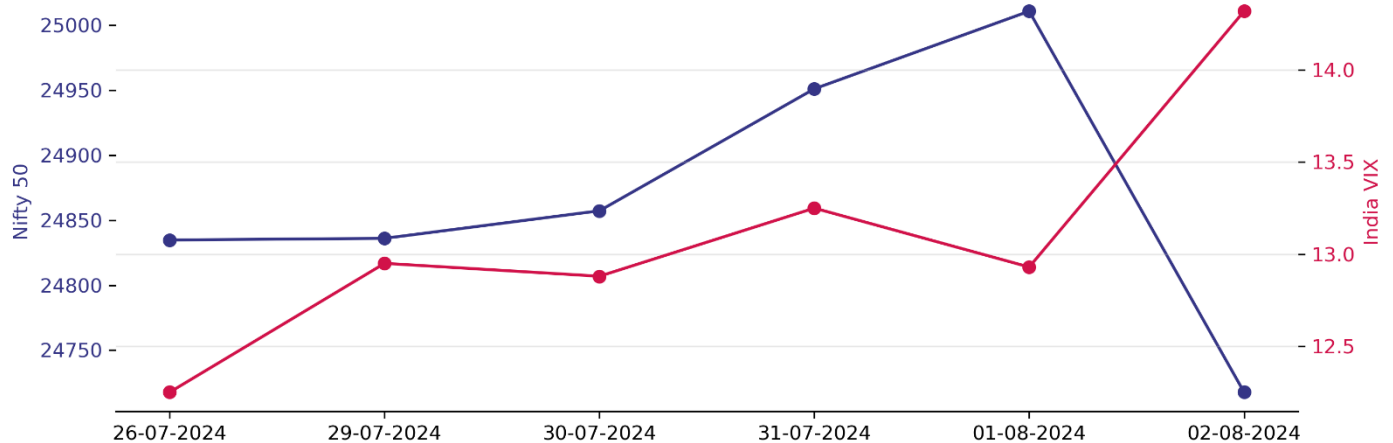
Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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