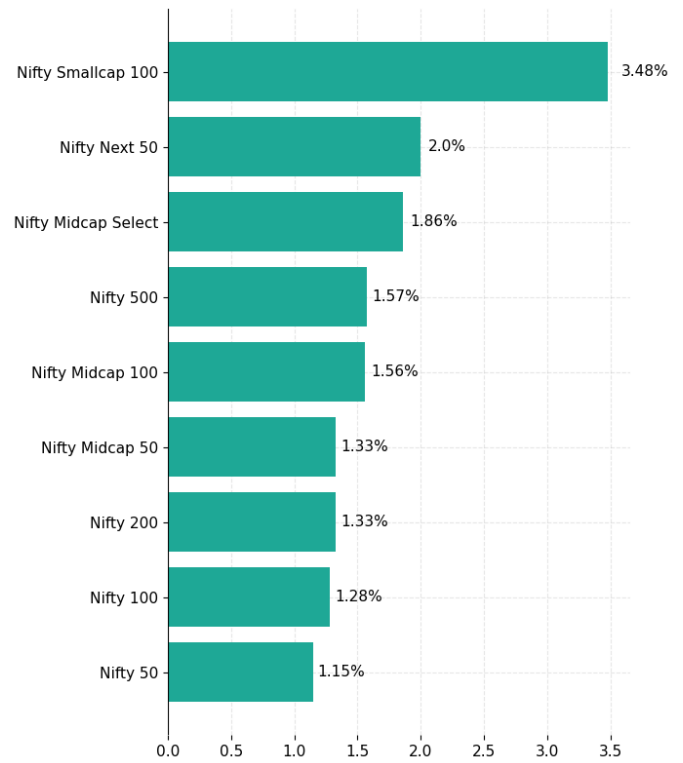


## Indices Performance

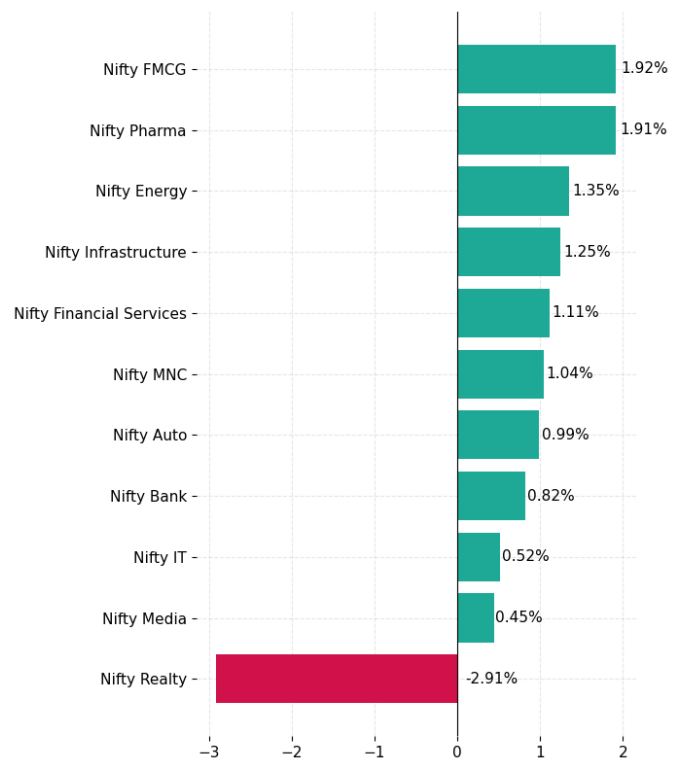
- For the second consecutive week, all the major market indices registered positive returns.
- The Nifty 50 index was up by +1.15% this week. Major contributors were the FMCG, Pharma, and Energy sectors.
- Nifty 100 registered a +1.28% positive return this week. The top contributors to the index were VBL, INDIGO, and HINDALCO.
- Nifty Next 50 registered a return of +2.00% this week. TRENT, INDIGO, and MOTHERSON were the top contributors to the index.
- Nifty Midcap Select and Nifty Midcap 100 posted a positive return this week, with +1.86 and +1.56%, respectively.
- The Nifty Smallcap 100 index posted a return of +3.48% this week, led by the ANGELONE, HFCL, and HSCL.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 39:11, up from last week's ADR of 27:23.



Source: NSE, INVES 21 Research

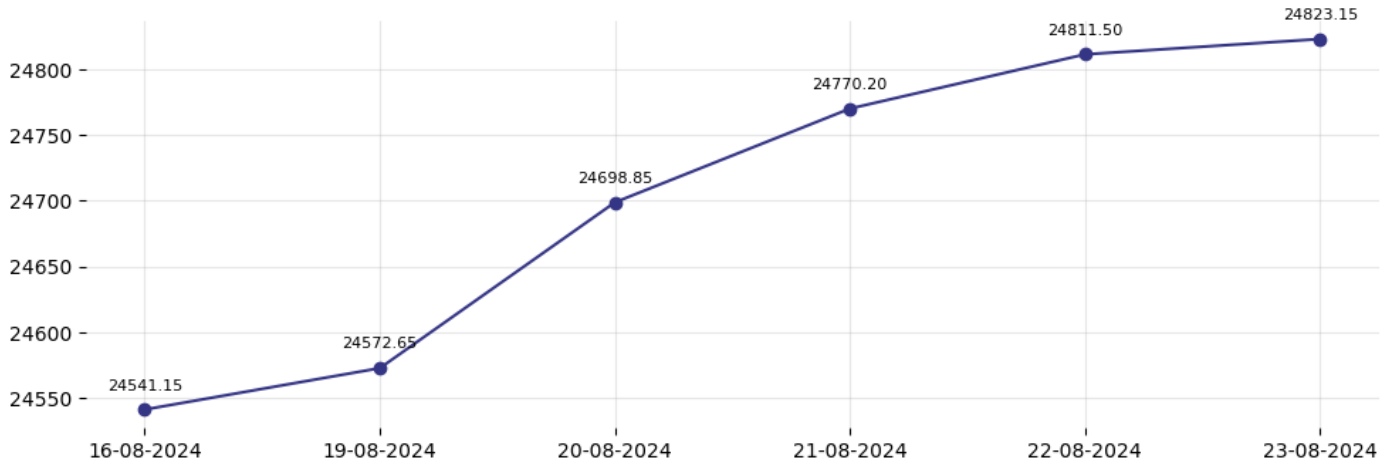
## Sectoral Performance

- This week, all major sectoral indices registered a positive return, except for the Nifty Realty.
- Nifty FMCG registered the highest return among the major sectoral indices, with a gain of +1.92%. The positive return was led by VBL, RADICO, and BALRAMCHIN.
- Nifty Pharma posted a positive return of +1.91% this week. GLENMARK, NATCOPHARM, and DIVISLAB were the major contributors to the index.
- Nifty Energy registered a positive return of +1.35%, led by BPCL, COALINDIA, and ADANIGREEN.
- Nifty Bank posted a positive return of +0.82%, the top contributors to the index were BANDHANBNK, BANKBARODA, and IDFCFIRST.
- Nifty IT posted a positive return of +0.52% this week. LTTS, MPHASIS, and LTIMS were the top gainers in the index.
- Nifty Realty posted a negative return this week; the index was down by -2.91%; LODHA, PRESTIGE, and OBEROIRLTY were the major draggers 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 ₹-1,608.89 crore this week. The week ending Aug 17 saw an outflow of ₹-8,616.43 crore. DII showed net buying of ₹13,020.29 crore this week. DIIs had a net buying of ₹10,560.08 crore last week.

Participant	Amount (Cr.)
FII	-1,608.89
DII	13,020.29

Data: Cash Market; Source: NSE, NSDL

## Economic Events

The India Services PMI (Purchasing Managers' Index) Business Activity Index rose slightly to 60.4 in August from 60.3 in July 2024. The services sector accounts for more than half of India's GDP. Data released by the HSBC flash PMI survey, compiled by S&P Global, highlighted strong new business inflow and job creation in the services sector.

In contrast to the service sector, the flash India Manufacturing PMI Output Index dropped to 60.9 in August, compared to 61.7 in July 2024. Similarly, flash India Manufacturing PMI fell slightly to 57.9 in August from 58.1 in the month of July. The India Composite PMI Output Index, which combines both manufacturing and services, dropped to 60.5 from 60.7 in the previous month.

Since the beginning of 2024, DII has contributed a total of INR 3.07 lakh crores in the cash segment (1 Jan – 23 Aug). Meanwhile, the FII had a net inflow in equities of a total of INR 19,260 crores, according to the NSE, NSDL, and CDSL data compiled by INVES 21 Research.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,393.4	24,608.3	24,737.8	24,952.7	25,082.2

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
HINDALCO	8.03%
SBILIFE	5.94%
BPCL	5.92%
BAJAJFINSV	5.81%
HDFCLIFE	5.74%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
M&M	-2.87%
ONGC	-2.49%
TATAMOTORS	-1.20%
ADANIENIT	-1.04%
WIPRO	-0.75%

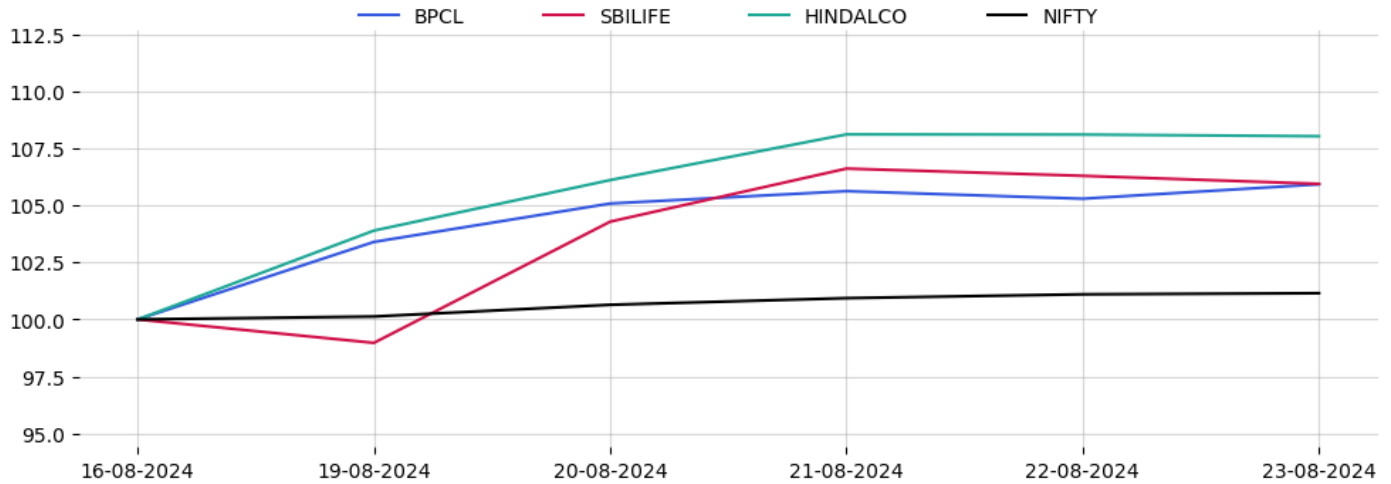
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	4,54,20,479
BPCL	1,49,81,694
ONGC	1,49,39,588

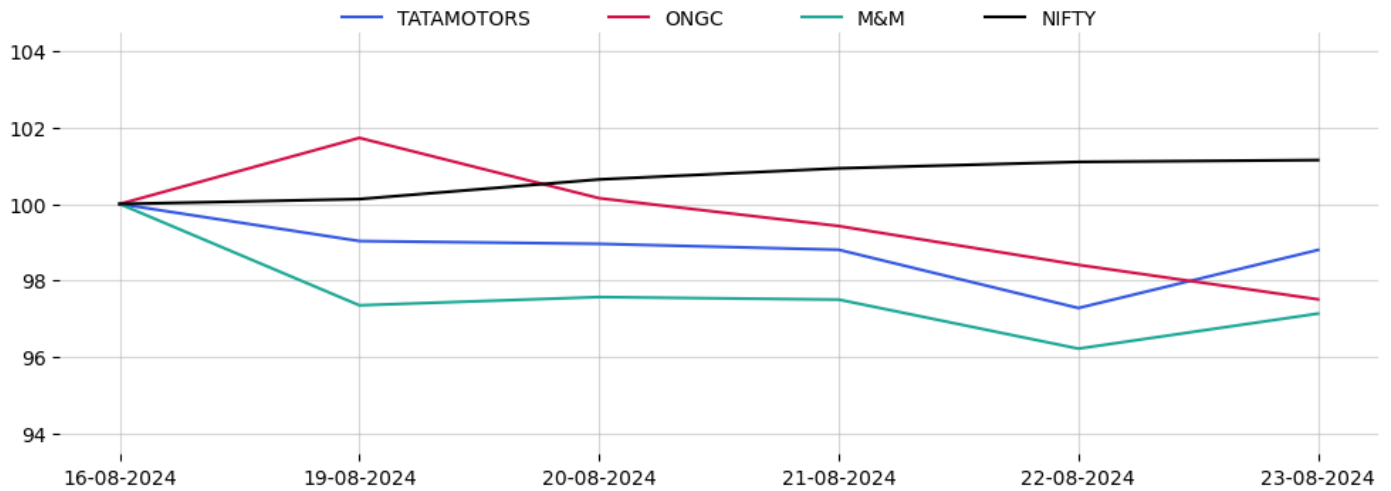
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



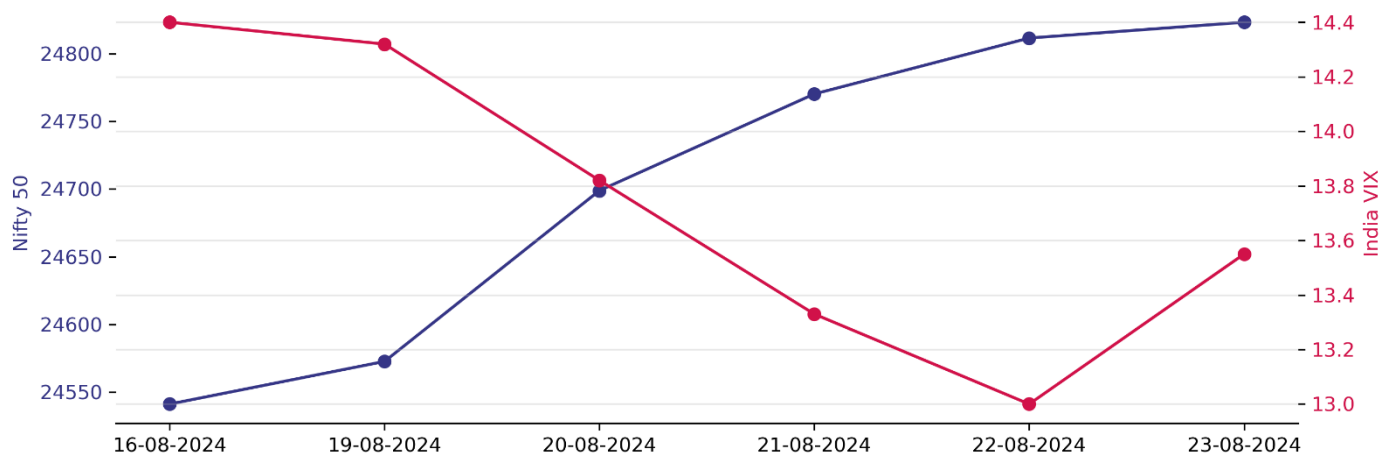
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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