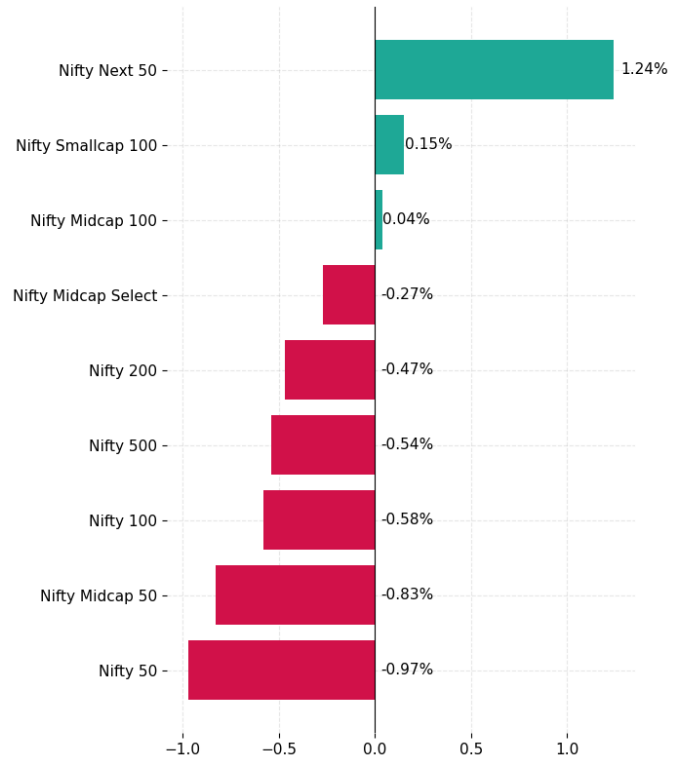


Indices Performance

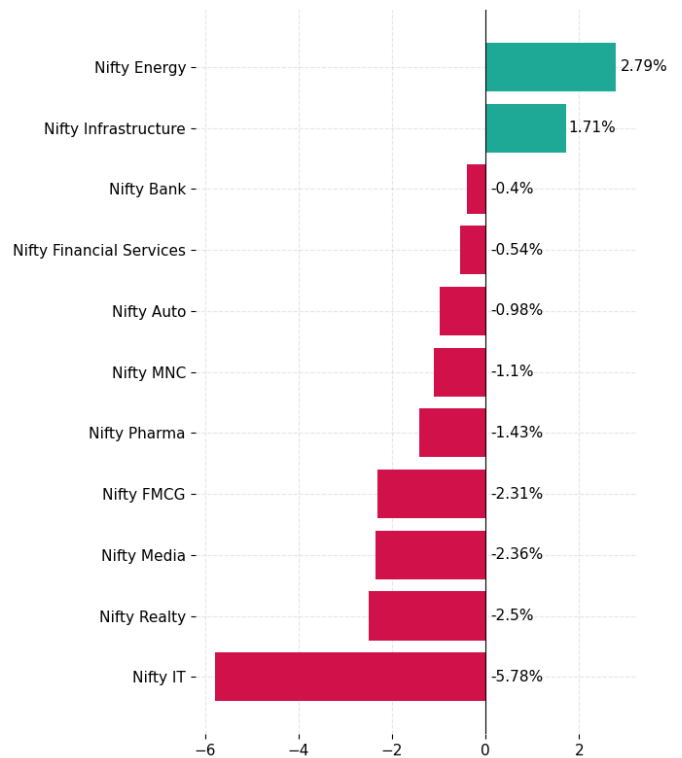
- This week, only 3 out of 9 major market indices posted a positive return.
- The Nifty 50 index was down by -0.97% this week. The IT, Realty, and FMCG sectors were significant draggers to the index.
- Nifty 100 registered -0.58% negative return this week. The top draggers to the index were LODHA, SHRIRAMFIN, and UNITDSPR.
- Nifty Next 50 registered a positive return of 1.24% this week. ADANIGREEN, ADANIPOWER, and ADANIENSOL were the top contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -0.27% and -0.83%, respectively. The top losers in the midcap index were COFORGE, HINDPETRO, and JUBLFOOD.
- The Nifty Smallcap 100 index posted a positive return of 0.15% this week, led by MANAPPURAM, EQUITASBNK, and MCX.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 22:28, slightly up from last week's ADR of 16:34.



Source: NSE, INVES 21 Research

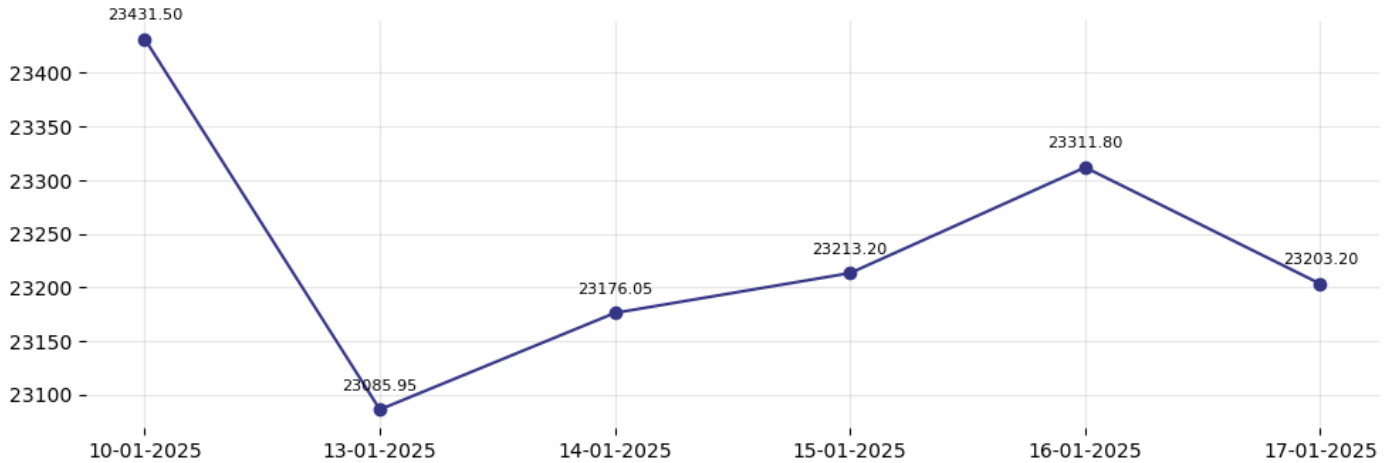
Sectoral Performance

- This week, 9 out of 11 major sectoral indices posted a negative return.
- Nifty Energy registered a positive return among the major sectoral indices, with a return of 2.79%. ADANIGREEN, ADANIPOWER, and NTPC led to positive returns in the index.
- Nifty Infrastructure posted a positive return of 1.71% this week. INDUSTOWER, NTPC, and AMBUJACEM were major contributors in the index.
- Nifty Bank registered a negative return of -0.40%, led by AXISBANK, ICICIBANK, and HDFCBANK.
- Nifty Auto posted a negative return of -0.98% this week. The major draggers in the index were M&M, MRF, and BAJAJ-AUTO.
- Nifty Realty posted a negative return of -2.50% this week. LODHA, OBEROIRLTY, and SOBHA were the top losers in the index.
- Nifty IT posted a negative return this week; the index was down by -5.78%. HCLTECH, COFORGE, and INFY 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 ₹-25,218.60 crore this week. The week ending Jan 10 saw an outflow of ₹-16,854.25 crore. DII showed a net buying of ₹25,151.27 crore this week. DIIs had a net buying of ₹21,682.76 crore last week.

Participant	Amount (Cr.)
FII	-25,218.60
DII	25,151.27

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's retail inflation, measured by the Consumer Price Index (CPI), eased to a four-month low of 5.22% in December 2024, down from 5.48% in November and lower than October's 14-month high of 6.21%. This decline brought inflation within the Reserve Bank of India's (RBI) tolerance band of 2-6%, largely due to falling prices of key food items such as vegetables, pulses, sugar, and cereals, as noted by the Ministry. The Consumer Food Price Index (CFPI) recorded a year-on-year increase of 8.39%, with rural food inflation at 8.65% and urban food inflation at 7.90%.

India's merchandise trade deficit narrowed to \$21.94 billion in December 2024, a significant reduction from the record \$31.86 billion in November, driven by a sharp decline in gold imports, which halved to \$4.7 billion, according to Commerce Department data. Merchandise exports contracted by 1% year-on-year to \$38.01 billion, impacted by ongoing geopolitical tensions, although electronics exports surged by 35.11% to a 24-month high of \$3.58 billion. Imports grew by 4.9% year-on-year to \$59.95 billion but declined 6% compared to November's revised figure of \$63.86 billion.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,869.6	23,036.4	23,214.0	23,380.8	23,558.4

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
HINDALCO	7.41%
NTPC	5.81%
HDFCLIFE	5.51%
COALINDIA	5.20%
RELIANCE	4.87%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
HCLTECH	-10.03%
INFY	-7.70%
WIPRO	-6.19%
M&M	-5.67%
TRENT	-5.58%

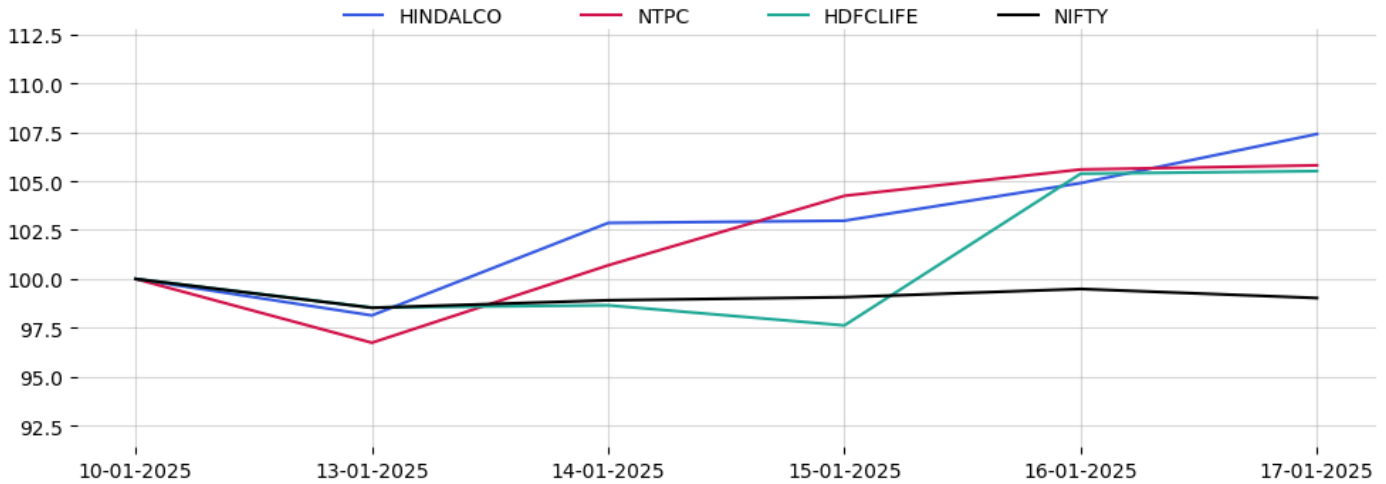
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	2,98,43,447
NTPC	1,86,98,902
BEL	1,58,39,589

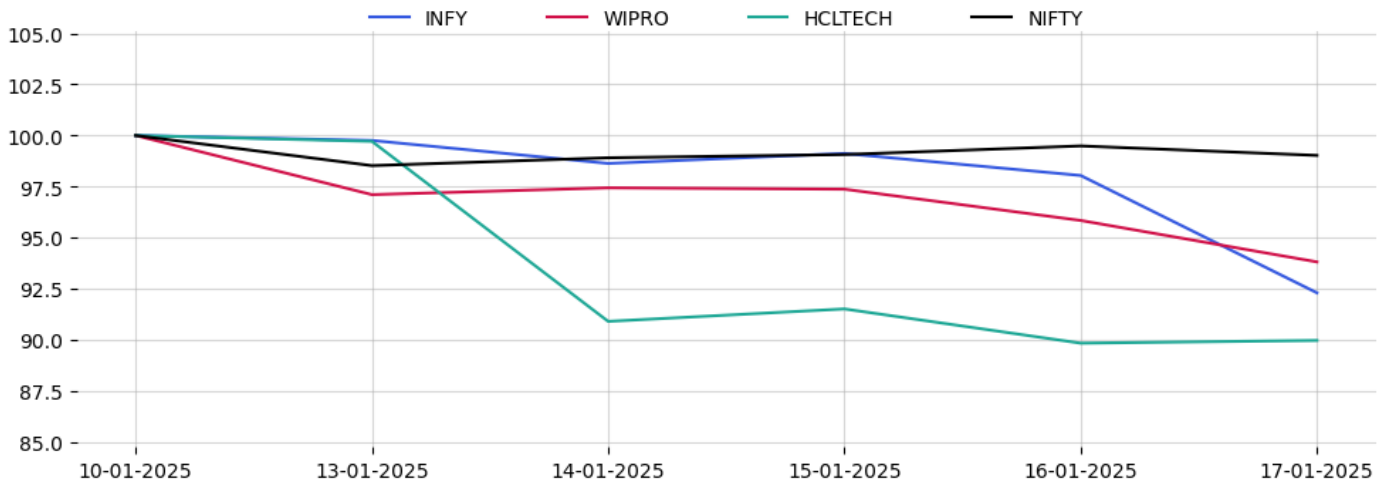
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



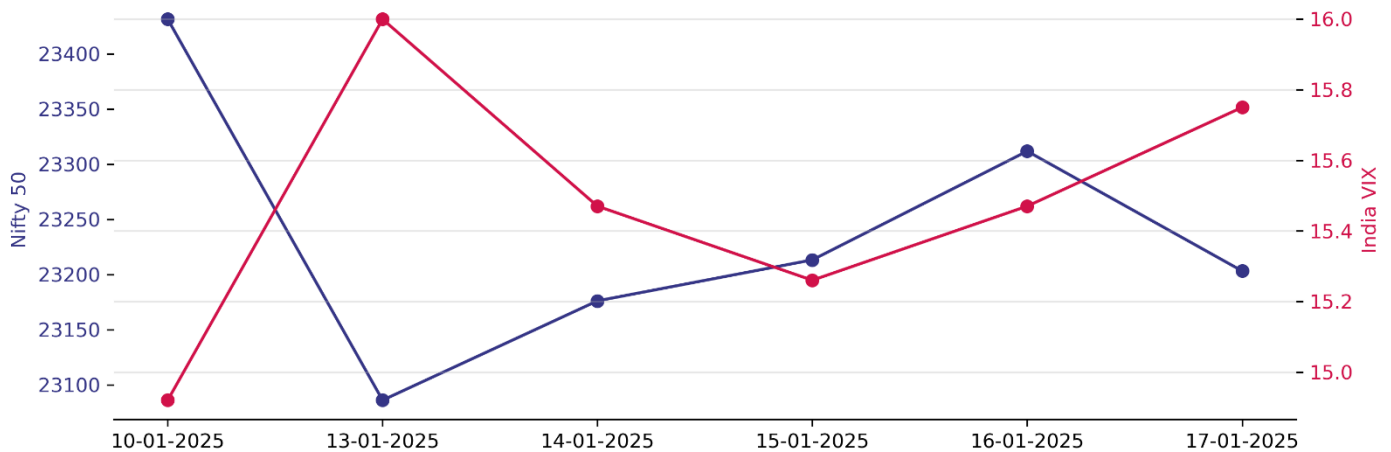
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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