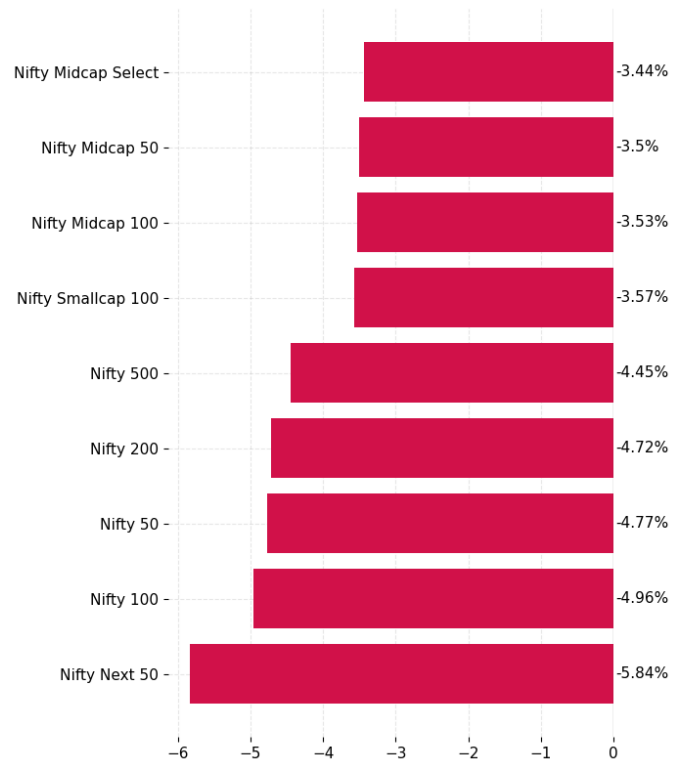


Indices Performance

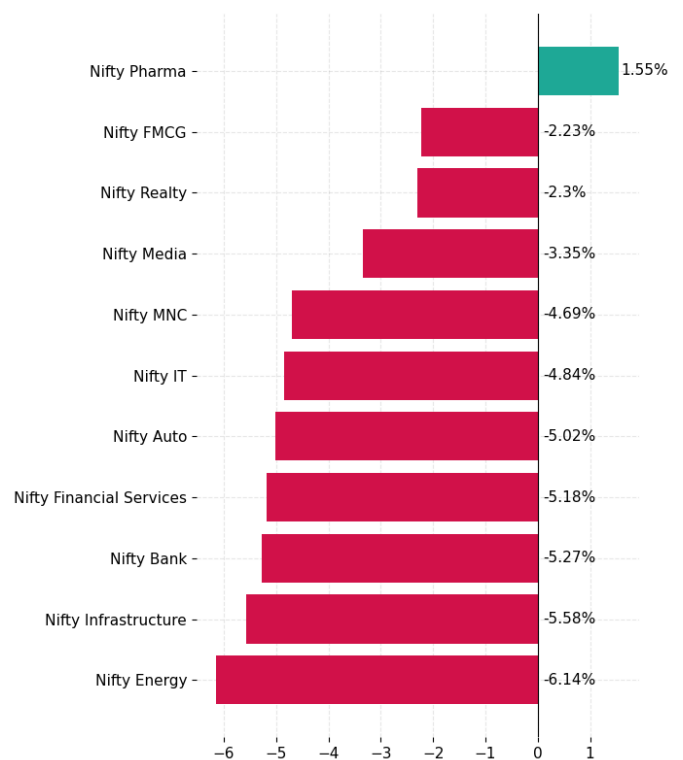
- This week, all the major market indices registered a negative return.
- The Nifty 50 index was down by -4.77% this week. The Energy, Bank, and Auto sectors were the significant draggers in the index.
- Nifty 100 registered -4.96% negative return this week. The top draggers in the index were SIEMENS, LTIM, and ADANIGREEN.
- Nifty Next 50 registered a negative return of -5.84% this week. PFC, JIOFIN, and HAL were the major losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -3.44% and -3.50%, respectively. The top losers to the midcap index were FEDERALBANK, CUMMINSIND, and MPHASIS.
- The Nifty Smallcap 100 index posted a negative return of -3.57% this week, led by ANGELONE, PEL, and RBLBANK.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 3:47, significantly down from last week's ADR of 23:27.



Source: NSE, INVES 21 Research

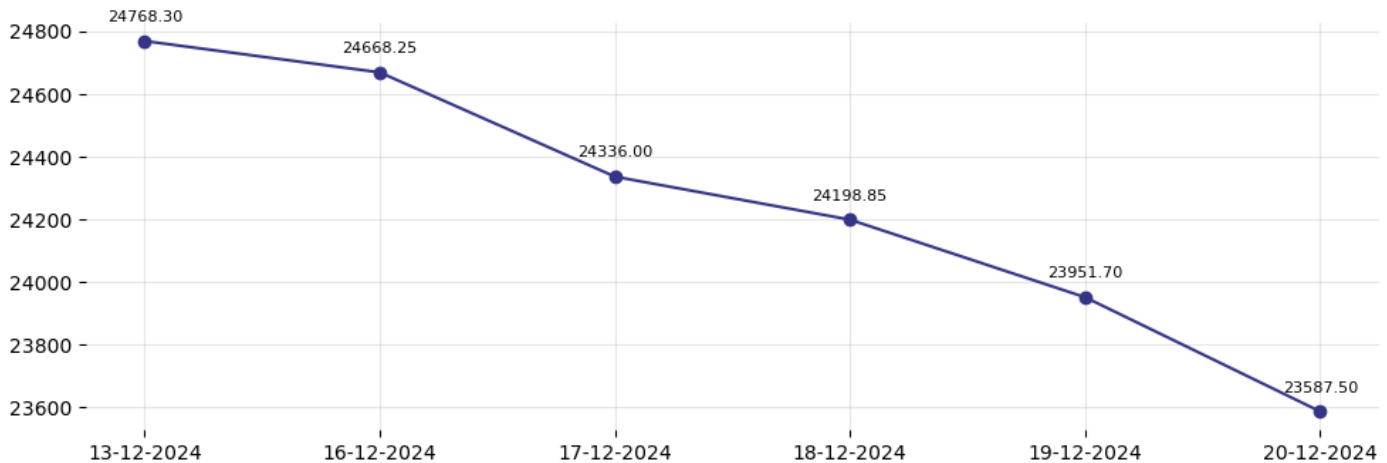
Sectoral Performance

- This week, all the major sectoral indices posted a negative return, except for the index Nifty Pharma.
- Nifty Pharma registered the highest positive return among the major sectoral indices, with a return of 1.55%. DRREDDY, MANKIND, and LUPIN led to positive returns in the index.
- Nifty FMCG posted a negative return of -2.23% this week. BALRAMCHIN, VBL, and PGHH were significant contributors to the index.
- Nifty IT registered a negative return of -4.84%, led by the LTIM, LTTS, and MPHASIS.
- Nifty Auto posted a negative return of -5.02% this week. The top contributors to the index were TATAMOTORS, EXIDEIND, and MOTHERSON.
- Nifty Bank posted a negative return of -5.27% this week. FEDERALBNK, CANBK, and BANKBARODA were the top gainers in the index.
- Nifty Energy posted a negative return this week; the index was down by -6.14%. ADANIGREEN, COALINDIA, and ONGC 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 ₹-15,828.11 crore this week. The week ending Dec 15 saw an outflow of ₹-226.70 crore. DII showed a net buying of ₹11,873.92 crore this week. DIIs had a net buying of ₹2,880.02 crore last week.

Participant	Amount (Cr.)
FII	-15,828.11
DII	11,873.92

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's wholesale price index (WPI) inflation eased to a three-month low of 1.89% in November 2024 from 2.36% in October, driven by a sharp decline in food prices, especially vegetables. WPI Food inflation dropped to 8.63% in November from 13.54% in October, with vegetable prices falling to 28.57% from 63.04% and onion prices declining by 2.85%. The fuel and power category saw further deflation at 5.83% compared to 5.79% in October, while inflation in manufactured products rose to 2% from 1.50%. Retail inflation also cooled to 5.48% in November 2024.

Equity mutual fund inflows in India slowed to ₹35,927 crore in November 2024 from ₹41,865 crore in October 2024. The month saw the launch of 18 New Fund Offers (NFOs), including four equity-oriented funds that raised ₹3,109 crore. Sectoral/Thematic funds attracted ₹7,658 crore, while large-cap, mid-cap, and small-cap funds received ₹2,548 crore, ₹4,833 crore, and ₹4,112 crore, respectively. Gross SIP contributions remained stable at ₹25,302 crore compared to ₹25,323 crore in October.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,724.8	23,156.2	23,968.7	24,400.1	25,212.6

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
DRREDDY	7.81%
CIPLA	1.71%
APOLLOHOSP	0.11%
-	-
-	-

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
LTIM	-13.26%
TATAMOTORS	-8.38%
UPL	-8.31%
JSWSTEEL	-8.25%
GRASIM	-7.58%

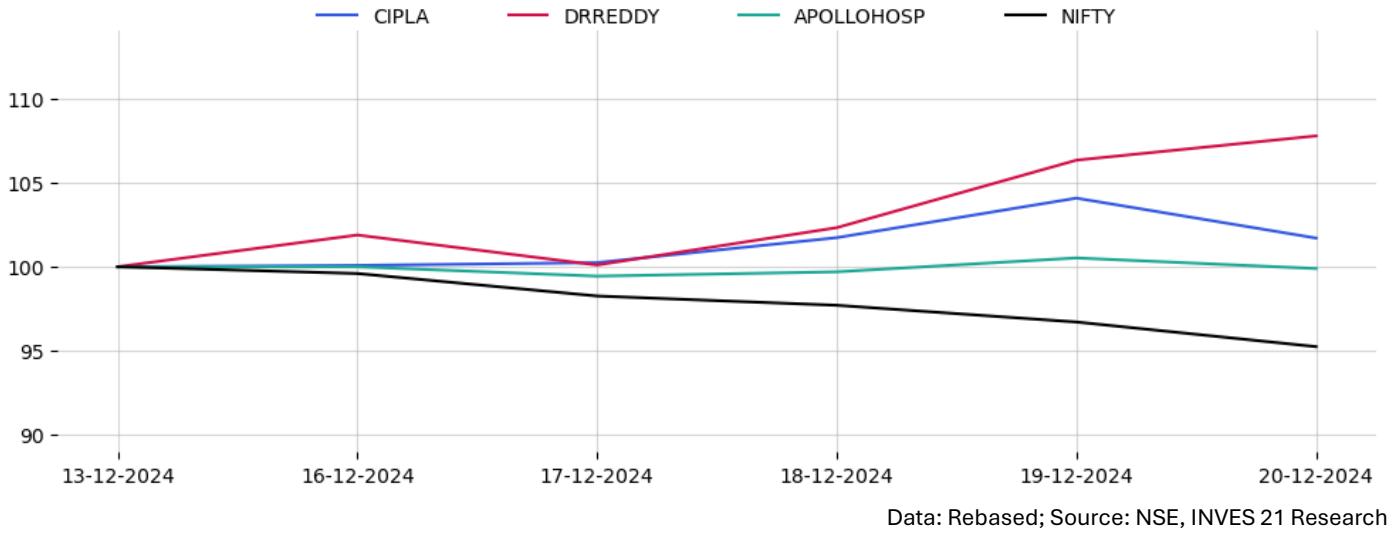
Source: NSE, INVES 21 Research

Volume Busters

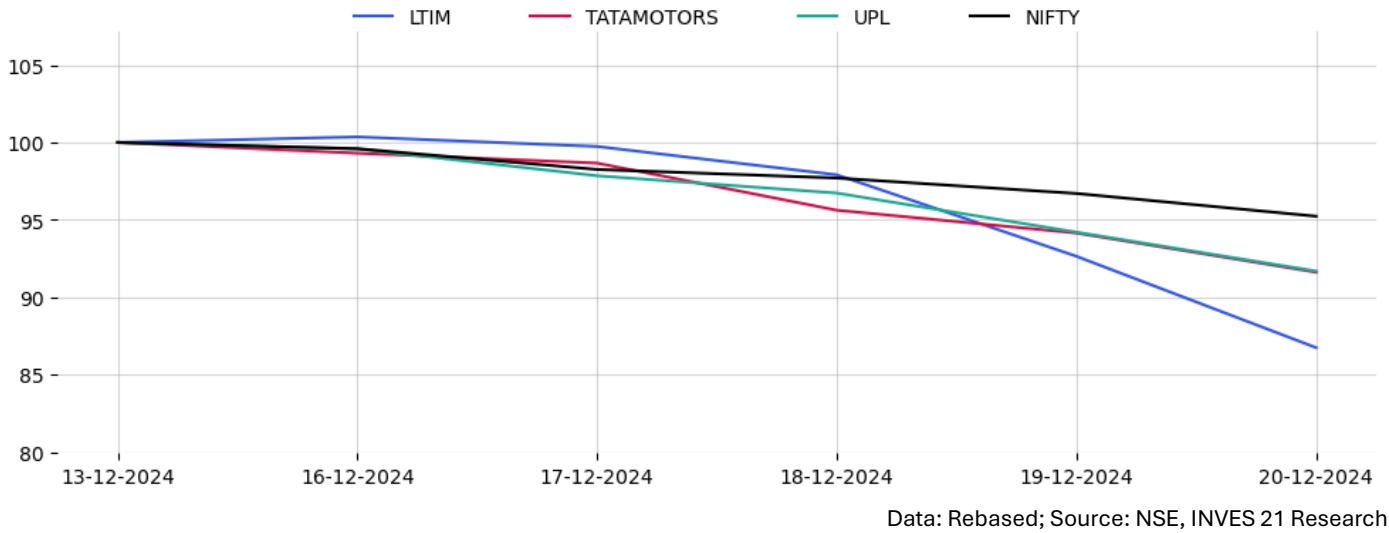
Stocks	Volumes
TATASTEEL	3,04,84,200
ICICIBANK	1,85,01,004
ITC	1,78,41,833

Source: NSE, INVES 21 Research

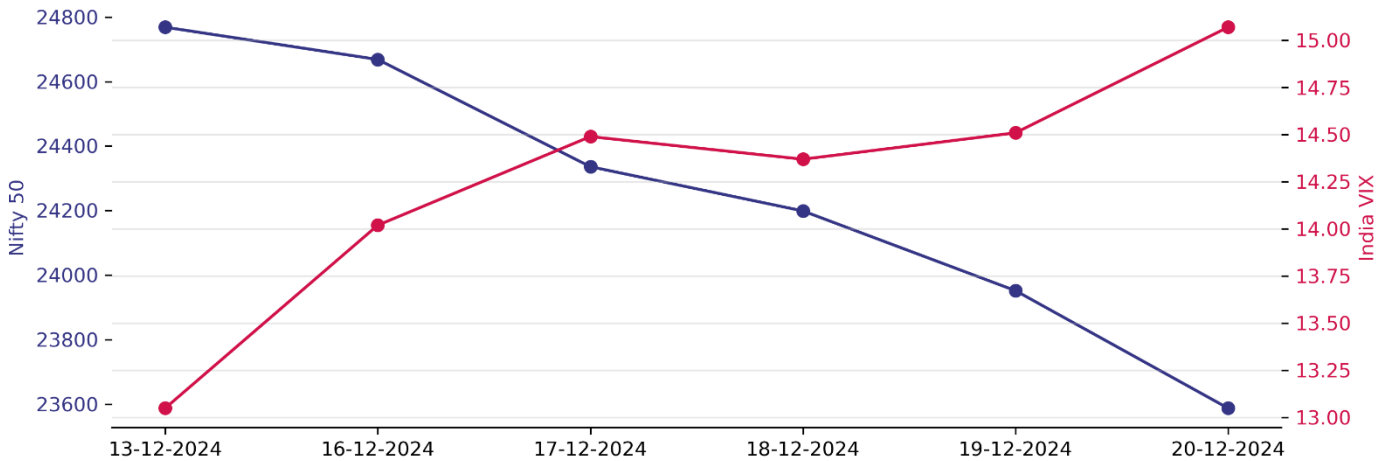
Top 3 Outperformers of the week



Top 3 Underperformers of the week



India VIX



Copyright of this document vests with S A Artha Securities Private Limited.

S A Artha Securities Private Limited

SEBI Reg No: Strock Broker: INZ000316838, ARN: 279815, SEBI Research Analyst Reg No: INH000016667,

Corp Office: Plot No:27, 2nd Floor, Sri Vishnu Elite, Jayabheri Enclave, Gachibowli, Hyderabad- 500032,

Compliance Officer: Mr. Raju N H N | E-mail: compliance@inves21.com, Tel No. 040- 48444546

Website: www.inves21.com

Terms & Conditions

The information in this report has been prepared by S A Artha Securities Private Limited. It is intended to be used only by the person or entity it addresses. The report and the information contained herein are strictly confidential. They should not be alerted in any way, transmitted to, copied, or distributed, in part or in whole, to any other person or to the media or reproduced in any form without prior written consent. The information and opinions in the report are subject to change without prior notice. The information contained in the report is obtained from public sources and sources to be reliable, but no independent verification has been made, nor is its accuracy.

The document and information herein are solely for information purposes. They shall not be used or considered as an offer document or solicitation of an offer to buy, sell, or subscribe for securities or other financial instruments. Though disseminated to all the customers simultaneously, not all customers may receive the reports at the same time. S A Artha Securities Private Limited will not treat recipients as customers by virtue of their receiving reports.

Disclaimer

This report does not constitute an offer to sell or solicitation for the purchase or sale of any financial instrument or as an official confirmation of any transaction. Though disseminated to all customers who are due to receive the same, not all customers may receive this report at the same time. S A Artha Securities Private Limited will not treat recipients as customers by virtue of their receiving this information/report.

Nothing in this report constitutes investment, legal, accounting, or tax advice or a representation that any investment or strategy is suitable or appropriate for customer satisfaction. The securities and strategies discussed and opinions expressed, if any, in this report may not be suitable for all investors, who must make their own investment decisions based on their own investment objectives, financial positions, and needs of specific recipients.

While we endeavor to update the information herein on a reasonable basis, S A Artha Securities Private Limited, its subsidiaries, and associated companies, their directors, and employees are under no obligation to update or keep the information current. Also, regulatory compliance or other reasons may prevent S A Artha Securities Private Limited and its affiliates from doing so. This report is prepared for assistance only and is not intended to be and must not alone be taken as the basis for an investment decision.

Recipients of this report should also be aware that past performance is not necessarily a guide to future performance, and the value of investments can go down as well. The user assumes the entire risk of any use made of this information. Each recipient of this document should make such investigations as it deems necessary to arrive at an independent evaluation of an investment in the securities of companies referred to in this document (including the merits and risks involved) and should consult its own advisors to determine the merits and risks of such an investment. The investment discussed, or views expressed may not be suitable for all investors. We do not undertake to advise you as to any change of our views.

This information/recommendation/report is not directed or intended for distribution to, or use by, any person or entity who is a citizen or resident of or located in any locality, state, country, or other jurisdiction where such distribution, publication, availability or use would be contrary to law, regulation or which would subject S A Artha Securities Private Limited and affiliates to any registration or licensing requirement within such jurisdiction. The securities described herein may or may not be eligible for sale in all jurisdictions or to certain categories of investors. Persons in whose possession this report may come are required to inform themselves of and to observe such restriction.

S A Artha Securities carries out proprietary trading in the cash and derivative segment. Our proprietary trading and investment business may make investment decisions that are inconsistent with the recommendations expressed herein.

The analyst certifies that the analyst might have dealt or traded directly or indirectly in securities of the company and that all the views expressed in this report accurately reflect his or her personal views about the subject company or companies and its or their securities and do not necessarily reflect those of S A Artha Securities Private Limited.