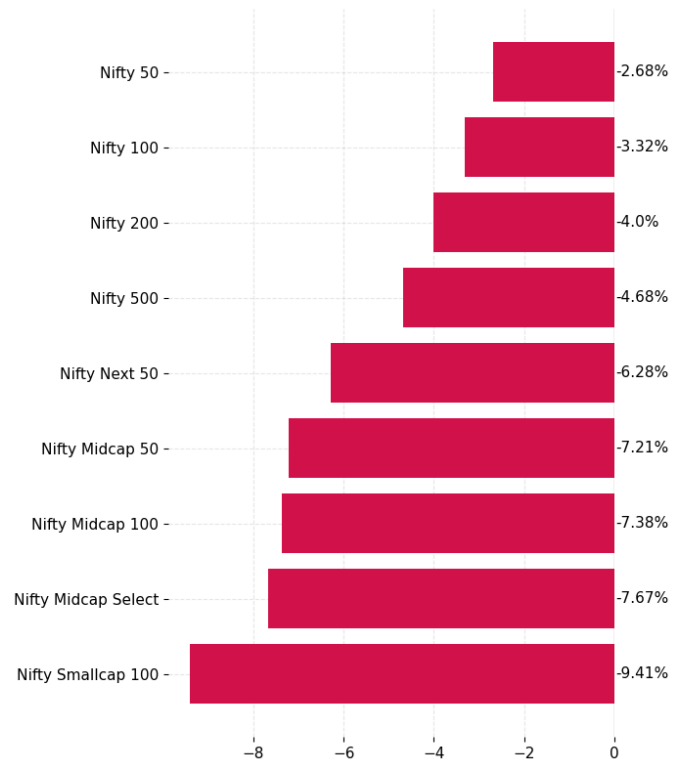


Indices Performance

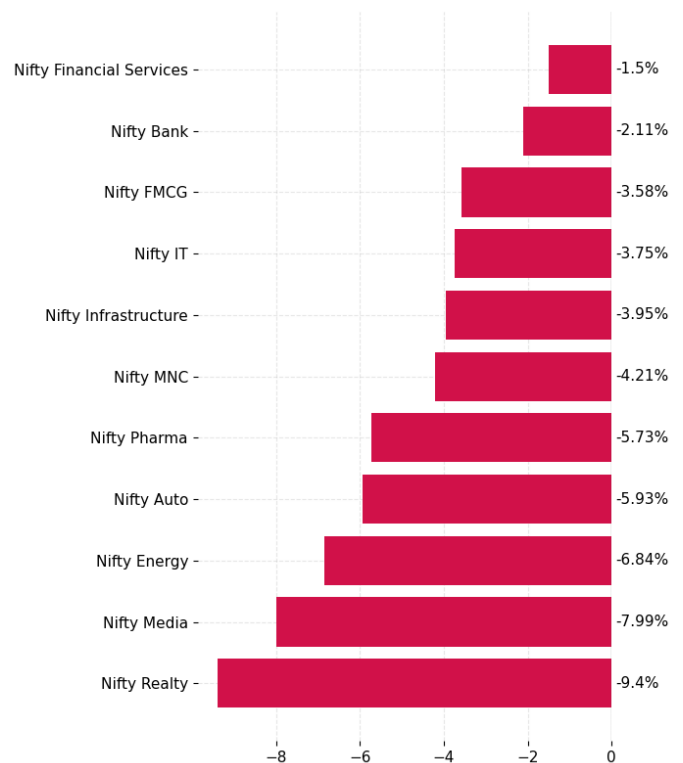
- This week, all major market indices posted a negative return.
- The Nifty 50 index was down by -2.68% this week. The Realty, Media, Auto, and Energy Services sectors contributed significantly to the index fall.
- Nifty 100 registered a -3.32% negative return this week. The top losers in the index were BEL, EICHERMOT, and VBL.
- Nifty Next 50 registered a negative return of -6.28% this week. VBL, JIOFIN, and DLF were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -7.67% and -7.21%, respectively. The top contributors to the midcap index fall were IDEA, VOLTAS, and PERSISTENT.
- The Nifty Smallcap 100 index posted a negative return of -9.41% this week, led by NATCOPHARM, SONATSOFTW, and NCC.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 6:44, significantly down from last week's ADR of 27:23.



Source: NSE, INVES 21 Research

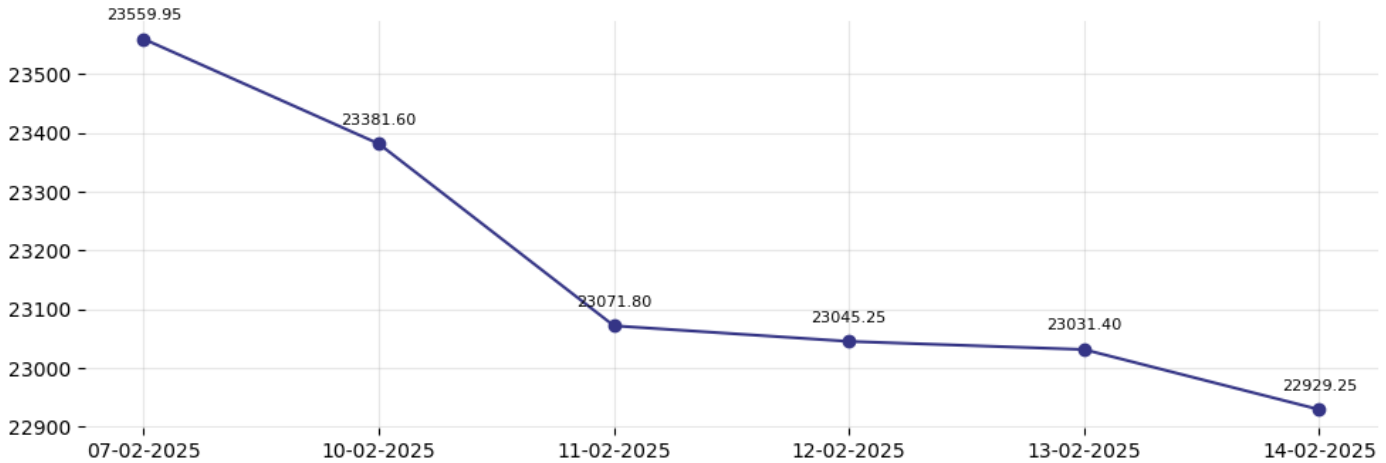
Sectoral Performance

- This week, all major market sectoral indices posted a negative return.
- Nifty Financial Services registered a negative return of -1.50%. RECLTD, PFC, and MCX led to negative returns in the index.
- Nifty Bank posted a negative return of -2.11% this week. CANBK, AUBANK, and PNB were major contributors to the index.
- Nifty FMCG registered a negative return of -3.58%, led by VBL, RADICO, and BALRAMCHIN.
- Nifty IT posted a negative return of -3.75% this week. The major contributors to the index fall were LTTS, PERSISTET, and MPHASIS.
- Nifty Auto posted a negative return of -5.93% this week. EICHERMOT, HEROMOTOCO, and MOTHERSON were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -9.40%. GODREJPROP, OBEROIRLTY, and BRIGADE 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 ₹-19,004.03 crore this week. The week ending Feb 7 saw an outflow of ₹-8,852.31 crore. DII showed a net buying of ₹18,745.02 crore this week. DIIs had a net buying of ₹6,449.67 crore last week.

Participant	Amount (Cr.)
FII	-19,004.03
DII	18,745.02

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's inflation dropped for the third month in a row, reaching 4.31% in January, the lowest since August 2024. This decline, lower than expectations of 4.6%, could allow further rate cuts by the Reserve Bank of India (RBI), which recently reduced the repo rate to 6.25% from 6.5% to support the economy. Food price inflation fell sharply from 7.69% in December to 5.68% in January, with vegetable prices seeing the most significant drop from 26.56% to 11.35%. Similarly, India's wholesale price index (WPI) inflation eased to 2.31% in January 2025, down from 2.37% in December 2024, driven by a decline in food prices. Fuel prices dropped by 2.78% in January, though manufacturing inflation increased to 2.51% from 2.14% in December.

India's industrial output growth slowed to 3.2% in December from 5.2% in November, mainly due to weaker manufacturing activity, which expanded by only 3% compared to 5.5% in the previous month. While mining output rose to 2.6% and electricity generation increased to 6.2%, the slowdown was evident in infrastructure and construction goods, which grew 6.3% compared to 8.1% in November.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,297.2	22,613.2	23,090.9	23,407.0	23,884.7

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
BHARTIARTL	2.40%
BAJAJFINSV	2.39%
BRITANNIA	1.42%
KOTAKBANK	1.20%
ICICIBANK	0.25%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
EICHERMOT	-12.46%
BEL	-9.64%
M&M	-8.00%
ADANIANT	-7.96%
APOLLOHOSP	-7.53%

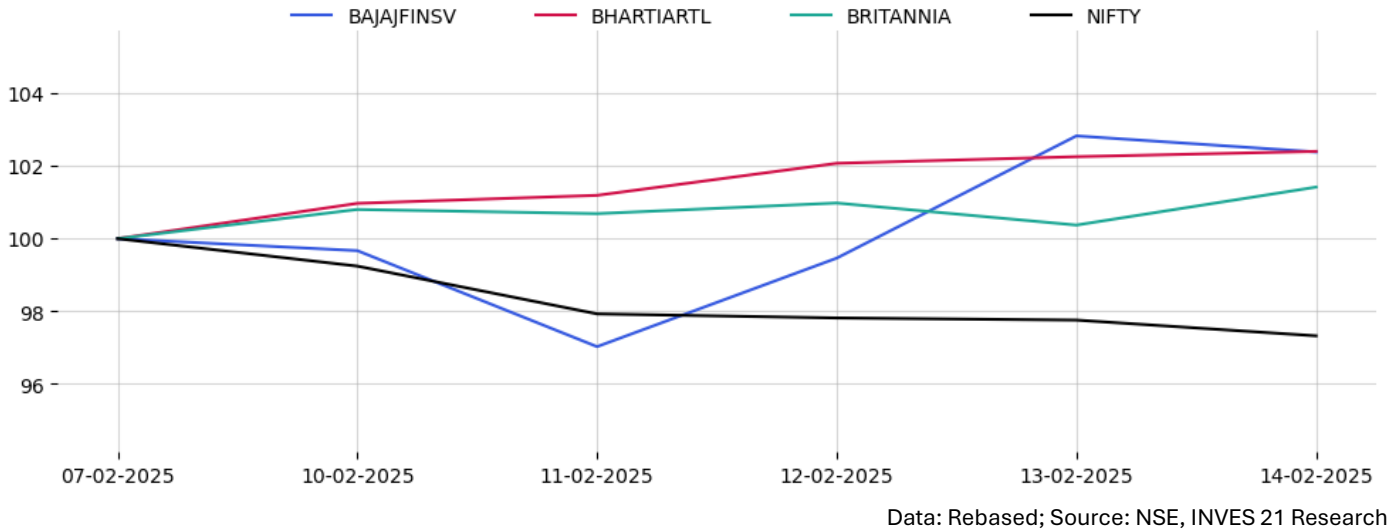
Source: NSE, INVES 21 Research

Volume Busters

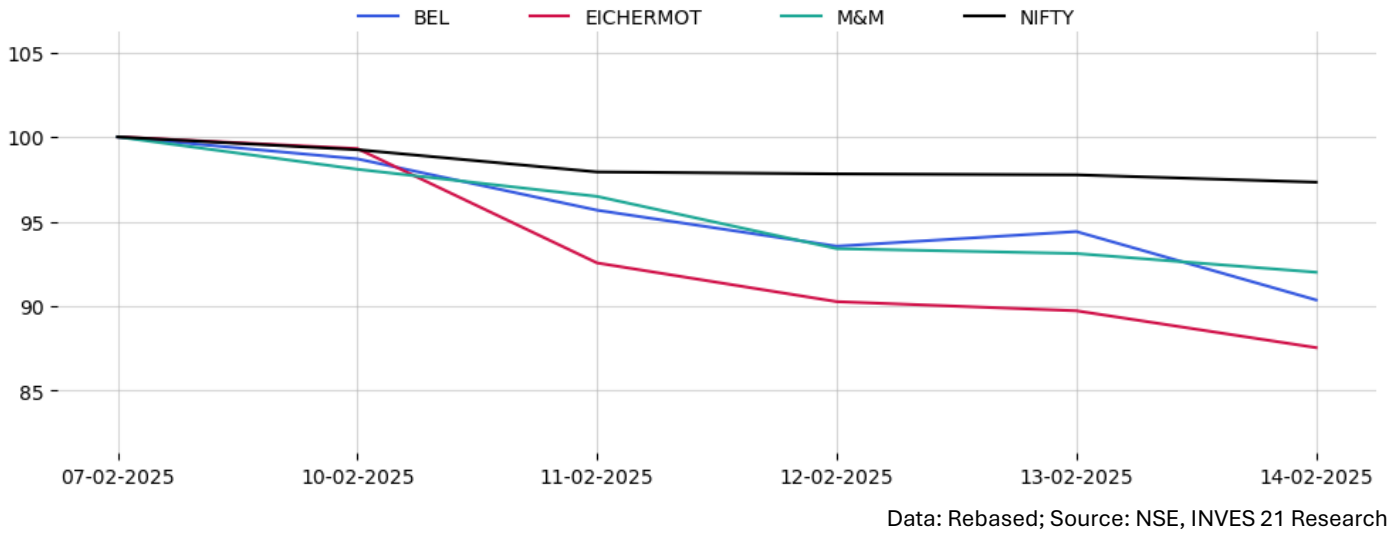
Stocks	Volumes
TATASTEEL	3,90,23,110
BEL	2,40,00,076
SBIN	1,64,01,378

Source: NSE, INVES 21 Research

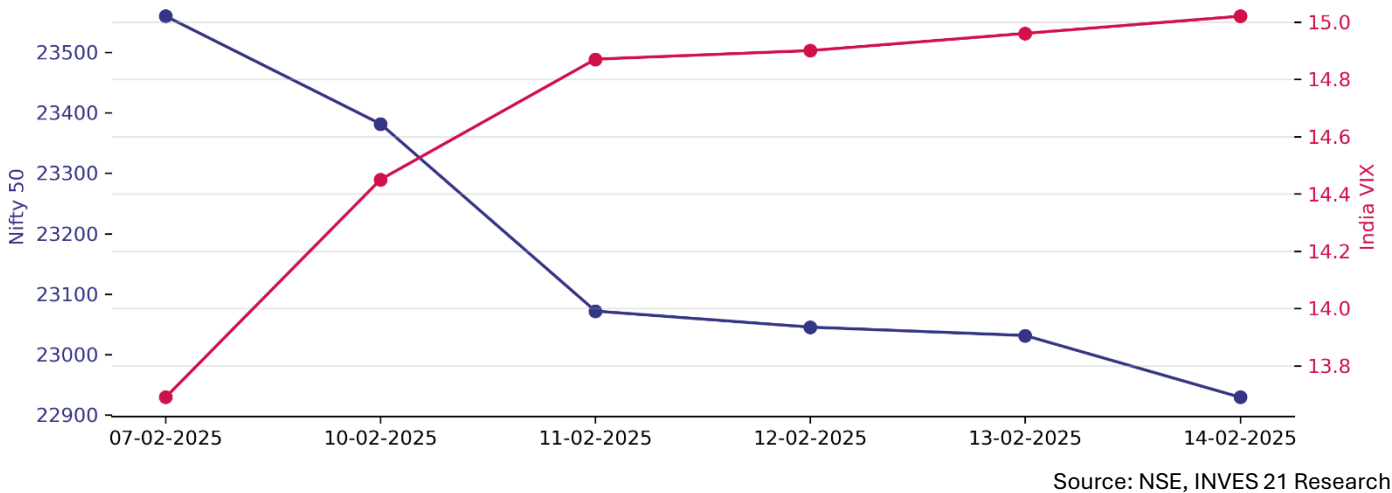
Top 3 Outperformers of the week



Top 3 Underperformers of the week



India VIX



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SEBI Reg No: Stock 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

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