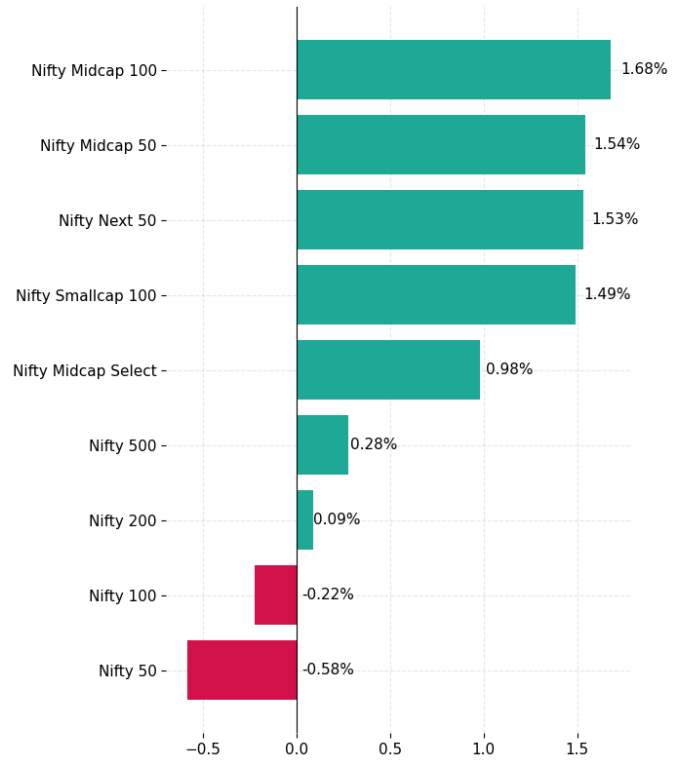


Indices Performance

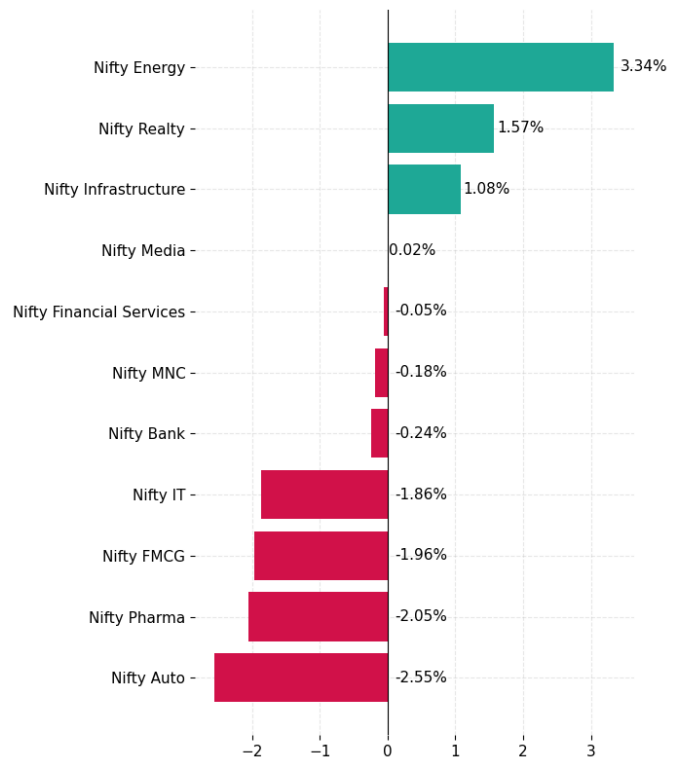
- All major market indices posted a positive return except for Nifty 50 and Nifty 100.
- The Nifty 50 index was down by -0.58% this week. The Auto, Pharma, FMCG, and IT sectors were the major draggers to the index.
- Nifty 100 registered a -0.22% negative return this week. The top losers to the index were M&M, ADANIENSOL, and BHARTIARTL.
- Nifty Next 50 registered a return of 1.53% this week. JSWENERGY, NHPC, and INDIGO were the major contributors to the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 0.98% and 1.54%, respectively. The top contributors to the midcap index were POLYCAB, INDHOTEL, and VOLTAS.
- The Nifty Smallcap 100 index posted a positive return of 1.49% this week, led by PPLPHARMA, MANAPPURAM, and RKFORGE.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 24:26, significantly up from last week's ADR of 6:44.



Source: NSE, INVES 21 Research

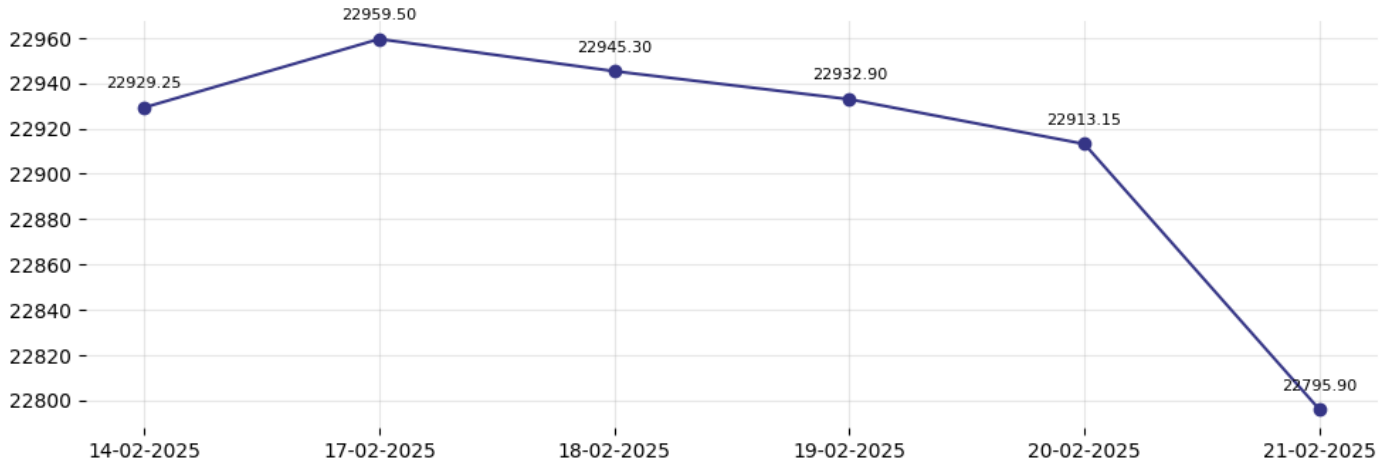
Sectoral Performance

- This week 4 out of 11 major sectoral indices posted positive returns.
- Nifty Energy registered the highest positive return among the major sectoral indices, with a return of 3.34%. NLCINDIA, JSWENERGY, and CESC led to positive returns in the index.
- Nifty Realty posted a positive return of 1.57% this week. LODHA, SOBHA and DLF were significant contributors to the index.
- Nifty Auto registered a negative return of -2.55%, M&M, TVSMOTOR, and MARUTI were the major losers.
- Nifty Pharma posted a negative return of -2.05% this week. NATCOPHARM, BIOCON, and LAURUSLABS were the major losers.
- Nifty Bank posted a negative return of -0.24% this week. The top losers in the index were ICICIBANK, FEDERALBNK and HDFCBANK.
- Nifty FMCG posted a negative return this week; the index was down by -1.96%. UNITDSPR, HINDUNILVR, and ITC 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 ₹-7,793.27 crore this week. The week ending Feb 14 saw an outflow of ₹-19,004.03 crore. DII showed a net buying of ₹16,581.95 crore this week. DIIs had a net buying of ₹18,745.02 crore last week.

Participant	Amount (Cr.)
FII	-7,793.27
DII	16,581.95

Data: Cash Market; Source: NSE, NSDL

Economic Events

According to HSBC PMI Flash Index released on 21st February 2025, India's Composite PMI rose to 60.6 from 57.7 in January, a six-month high, driven by the services sector's PMI increasing to 61.1 from 56.5. The manufacturing PMI slightly declined to 57.1 from 57.7 but remained above the long-term average of 54.1. Input price inflation moderated, while output price inflation accelerated, with services expansion attributed to a surge in new business, especially internationally, and record-high employment growth.

According to RBI's Summary of Outward Foreign Direct Investment (OFDI) based on January 2025 data, equity inflows surged by approximately 166% year-on-year, rising from 807.76 \$Mn to 2,149.66 \$Mn. Loan flow declined by about 7%, from 347.57 \$Mn to 322.95 \$Mn. Guarantees issued fell by roughly 4%, from 1,290.14 \$Mn to 1,237.22 \$Mn. Total financial commitments jumped by around 52% year-on-year, increasing from 2,445.46 \$Mn to 3,709.83 \$Mn.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
22,525.7	22,660.8	22,855.4	22,990.5	23,185.0

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
NTPC	8.62%
SHRIRAMFIN	8.52%
HINDALCO	7.81%
EICHERMOT	5.51%
TATASTEEL	4.68%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
M&M	-9.29%
BHARTIARTL	-4.53%
DRREDDY	-3.78%
TCS	-3.78%
SUNPHARMA	-3.34%

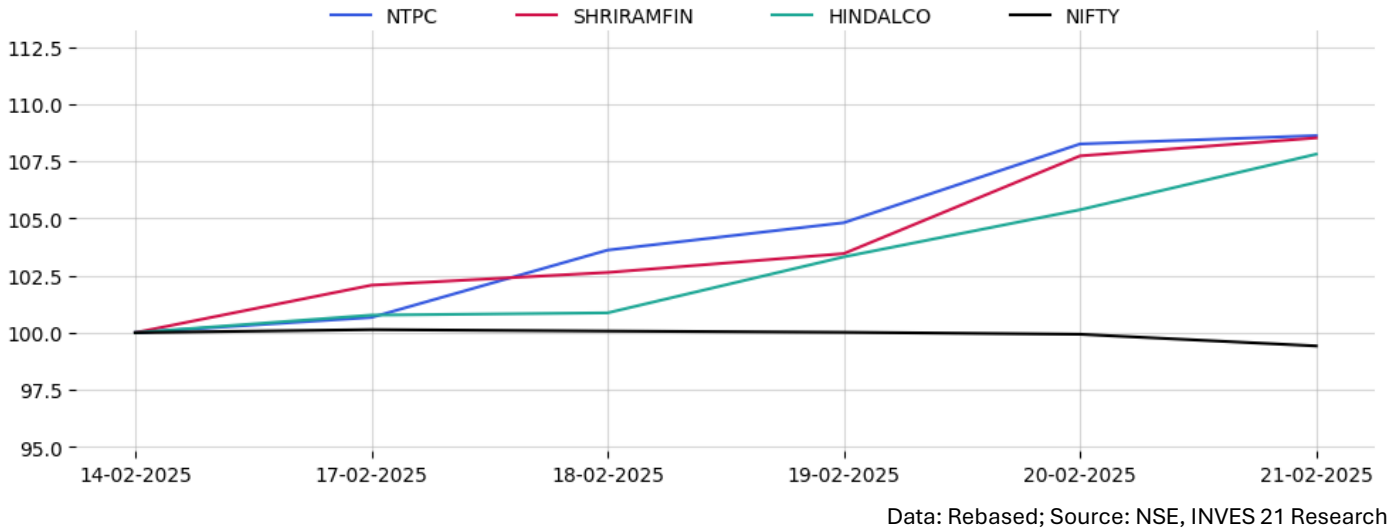
Source: NSE, INVES 21 Research

Volume Busters

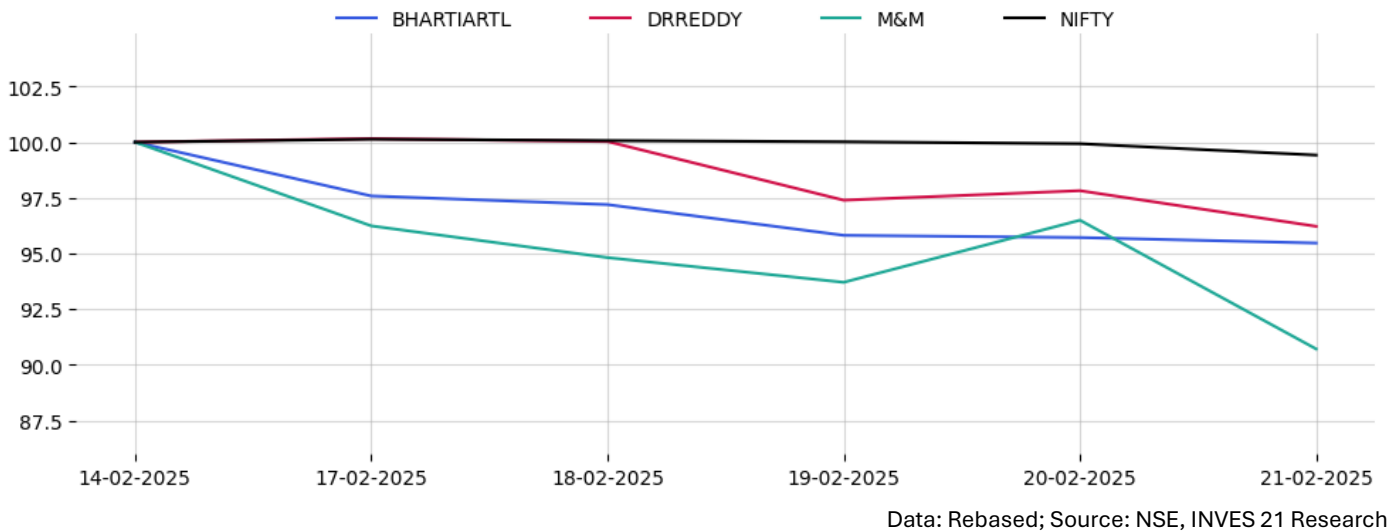
Stocks	Volumes
TATASTEEL	28,531,922
BEL	21,474,119
NTPC	12,746,849

Source: NSE, INVES 21 Research

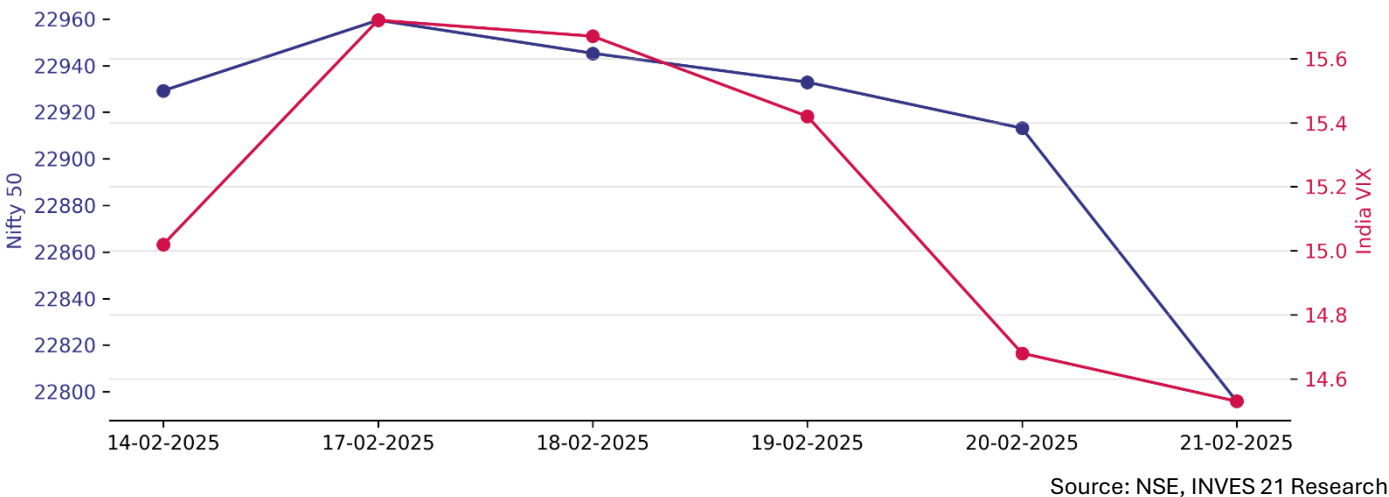
Top 3 Outperformers of the week



Top 3 Underperformers of the week



India VIX



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