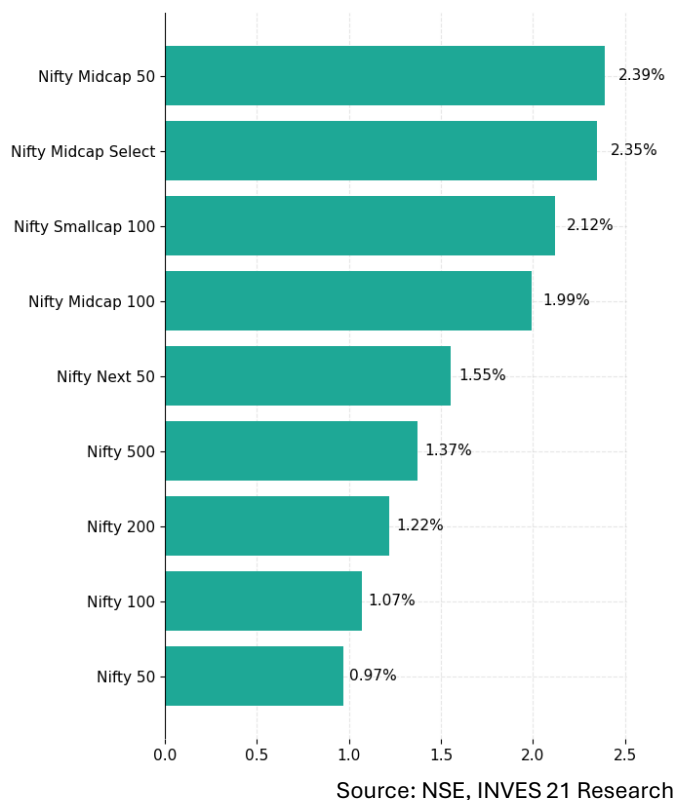


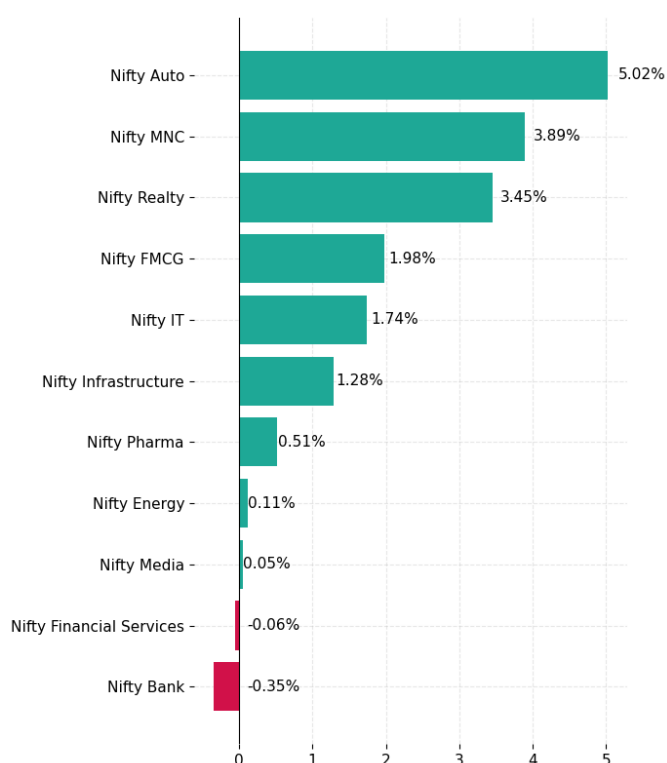
Indices Performance

- This week, all of the major market indices posted a positive return. For the second consecutive week, all the major market indices posted positive returns.
- The Nifty 50 index was up by 0.97% this week. The Auto, Realty, and FMCG sectors contributed significantly to the rise in the index.
- Nifty 100 registered a positive 1.07% return this week. The top gainers in the index were MARUTI, HYUNDAI, and HERMOTOCO.
- Nifty Next 50 registered a positive return of 1.55% this week. TVSMOTOR, DMART, and SWIGGY were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 2.35% and 2.39%, respectively. The top contributors to the midcap index were IDEA, ASHOKLEY, and VOLTAS.
- The Nifty Smallcap 100 index posted a positive return of 2.12% this week, led by SONATASOFTW, RPOWER, and SWANENERGY.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 35:15, slightly down from the last week's ADR of 38:12.



Sectoral Performance

- This week, all major sectoral indices posted a positive return except for the Nifty Bank and Nifty Financial Services.
- Nifty Auto registered a positive return of 5.02%. MARUTI, ASHOKLEY, and TVSMOTOR led to positive returns in the index.
- Nifty Realty posted a positive return of 3.45% this week. PHOENIXLTD, GODREJPROP, and LODHA were major contributors to the index.
- Nifty FMCG registered a positive return of 1.98%, led by COLPAL, HINDUNILVR, and NESTLEIND.
- Nifty IT posted a positive return of 1.74% this week. The major contributors to the index were COFORGE, MPHASIS, and INFY.
- Nifty Pharma posted a positive return of 0.51% this week. MANKIND, BIOCON, and IPCALAB were the top gainers in the index.
- Nifty Bank posted a negative return this week; the index was down by -0.35%. HDFCBANK, INDUSINDBK, and PNB were the top losers in the index.

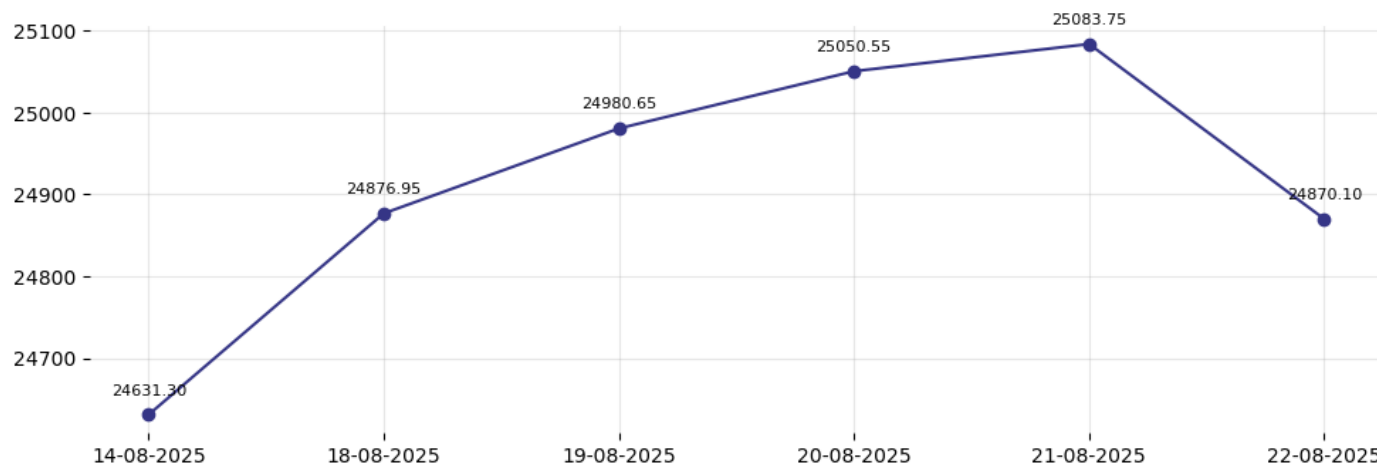


Weekly Market Review

23 August 2025

INVES 21™
 The Future of Financial Services

Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an outflow of ₹-1,559.51 crore this week. The week ending Aug 15 saw an outflow of ₹-10,172.64 crore. DII showed a net buying of ₹10,388.23 crore this week. DIIs had a net buying of ₹18,999.76 crore last week.

Participant	Amount (Cr.)
FII	-1,559.51
DII	10,388.23

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's private sector economy witnessed a sharp acceleration in August, with the HSBC Flash India Composite PMI Output Index surging to 65.2 from 61.1 in July, its highest level since survey records began in December 2005, according to S&P Global. The HSBC Flash India Services PMI Business Activity Index soared to a record high of 65.6, up from 60.5 in July, reflecting strong demand and business confidence, while the manufacturing PMI climbed to 59.8, its strongest level since January 2008. The data highlights broad-based growth and signals resilient economic activity despite global uncertainties.

India's foreign exchange reserves rose by USD 1.49 billion to reach a record USD 695.11 billion for the week ended August 15, according to RBI data. This follows a sharp increase of USD 4.75 billion in the previous reporting week. The uptick was primarily driven by a USD 1.92 billion rise in foreign currency assets, which now stand at USD 585.90 billion, while Special Drawing Rights (SDRs) inched up by USD 41 million to USD 18.78 billion.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,658.1	24,764.1	24,958.9	25,064.9	25,259.7

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
MARUTI	10.92%
NESTLEIND	6.75%
HEROMOTOCO	6.16%
HINDUNILVR	6.02%
BAJAJ-AUTO	5.67%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ITC	-3.20%
BEL	-2.61%
LT	-2.21%
HCLTECH	-1.58%
POWERGRID	-1.43%

Source: NSE, INVES 21 Research

Volume Busters

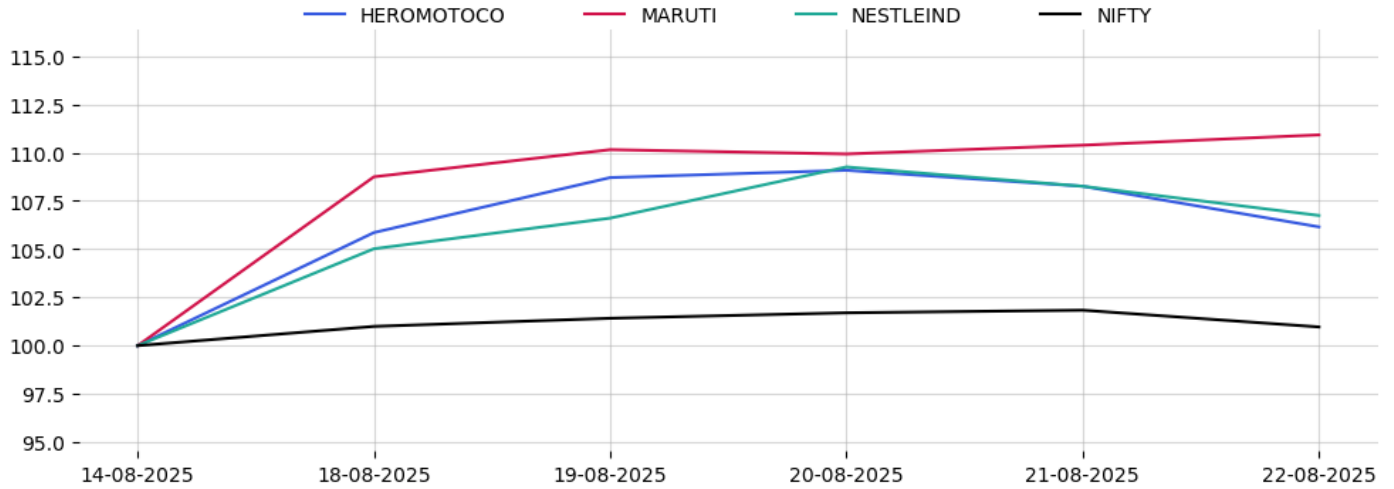
Stocks	Volumes
TATASTEEL	3,18,94,947
ITC	1,72,52,871
BEL	1,31,92,124

Weekly Market Review

23 August 2025

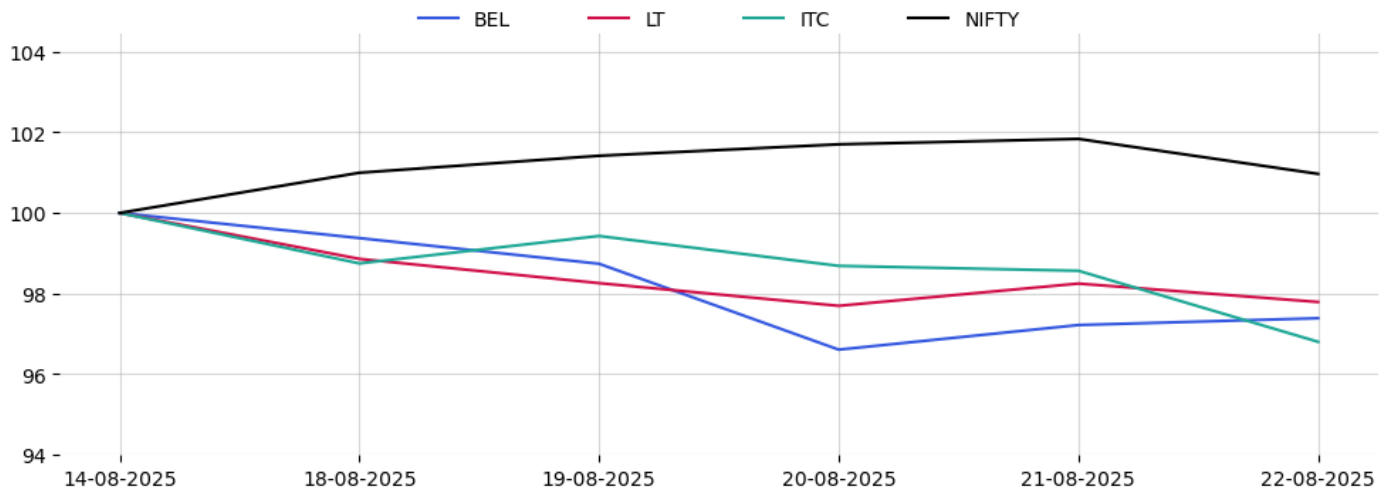
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Top 3 Outperformers of the week



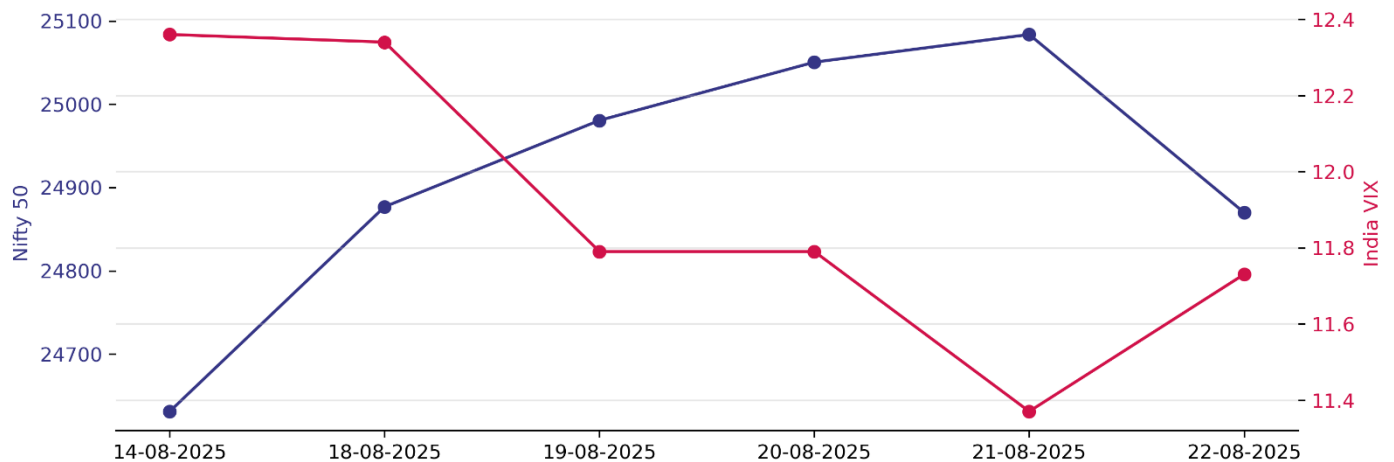
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



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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. Mahananda Samsani | E-mail: compliance@inves21.com, Tel No. 040- 48444546

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