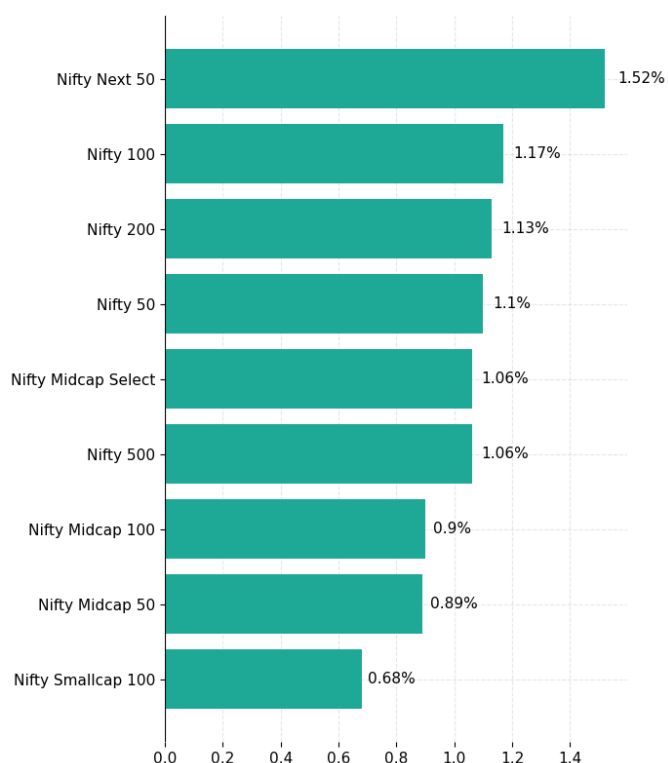


Indices Performance

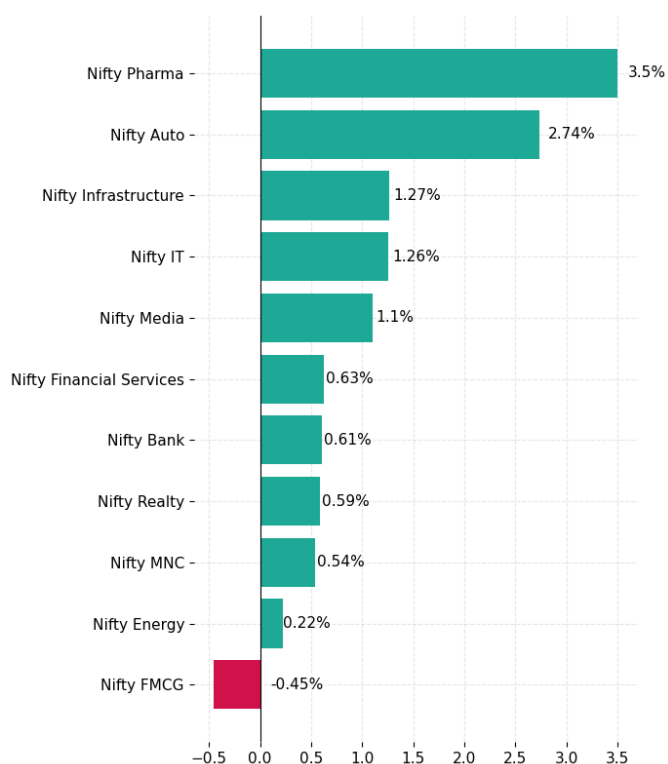
- This week, all of the major market indices posted a positive return. After the 6 consecutive weeks of negative returns market posted the positive return.
- The Nifty 50 index was up by 1.10% this week. The Pharma, Auto, and IT sectors contributed significantly to the rise in the index.
- Nifty 100 registered a positive 1.17% return this week. The top gainers in the index were APOLLOHOSP, CIPLA, and HDFCLIFE.
- Nifty Next 50 registered a positive return of 1.52% this week. SIEMENS, HYUNDAI, and ZYDUSLIFE were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 1.06% and 0.89%, respectively. The top contributors to the midcap index were LUPIN, CUMMINSIND, and BHARATFORG.
- The Nifty Smallcap 100 index posted a positive return of 0.68% this week, led by HBLENGINE, GODFREYPHLP, and KPIL.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 38:12, up from the last week's ADR of 24:26.



Source: NSE, INVES 21 Research

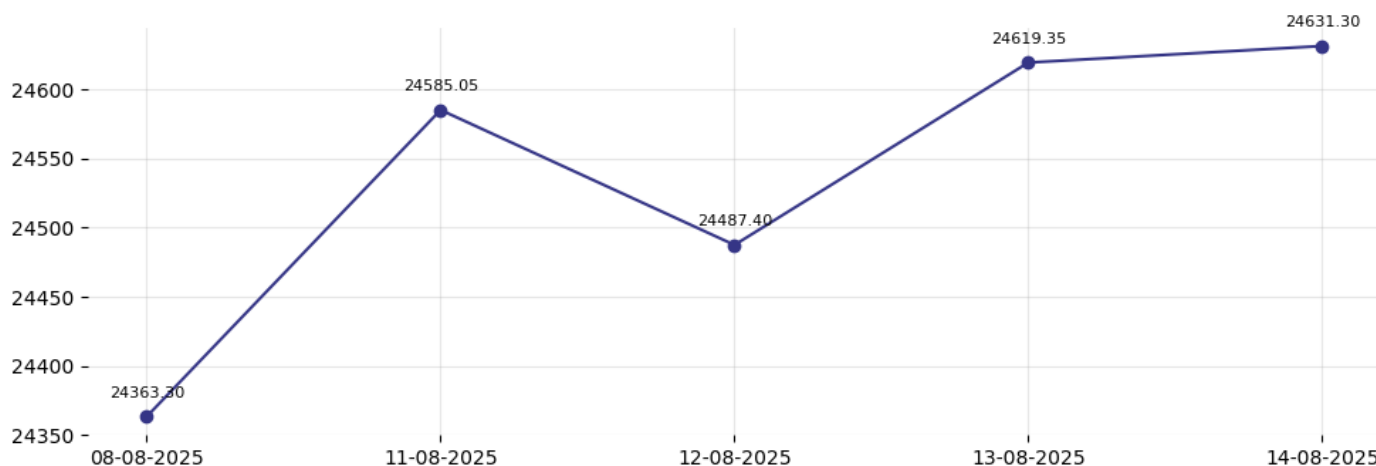
Sectoral Performance

- This week, all major sectoral indices posted a positive return except for the Nifty FMCG.
- Nifty Pharma registered a positive return of 3.50%. ALKEM, ZYDUSLIFE, and LUPIN led to positive returns in the index.
- Nifty Auto posted a positive return of 2.74% this week. TIINDIA, ASHOKLEY, and TATAMOTORS were major contributors to the index.
- Nifty IT registered a positive return of 1.26%, led by COFORGE, OFSS, and LTIM.
- Nifty Bank posted a positive return of 0.61% this week. The major contributors to the index were SBIN, PNB, and BANKBARODA.
- Nifty Energy posted a positive return of 0.22% this week. SIEMENS, ATGL, and GVT&D were the top gainers in the index.
- Nifty FMCG posted a negative return this week; the index was down by -0.45%. COLPAL, PATANJALI, and BRITANNIA 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 ₹-10,172.64 crore this week. The week ending Aug 8 saw an outflow of ₹-10,652.47 crore. DII showed a net buying of ₹18,999.76 crore this week. DIIs had a net buying of ₹33,608.66 crore last week.

Participant	Amount (Cr.)
FII	-10,172.64
DII	18,999.76

Data: Cash Market; Source: NSE, NSDL

Economic Events

Equity mutual funds witnessed a sharp surge in July 2025, with inflows jumping 81% to ₹42,702 crore compared to ₹23,587 crore in June, according to AMFI. Overall industry AUM climbed to a record ₹75.35 lakh crore, supported by strong retail participation through SIPs, which saw monthly inflows of ₹28,464 crore from 9.11 crore accounts, with registrations rising to 68.7 lakh. Investor appetite remained broad-based, with small cap funds leading at ₹6,484 crore, mid cap funds attracting ₹5,182 crore, and large cap funds seeing ₹2,125 crore of inflows, reflecting continued confidence in equities across segments.

India's retail inflation eased to an eight-year low of 1.55% in July 2025, slipping below the RBI's 2-4% target range for the fifth straight month, as food prices fell sharply by 1.76% on the back of strong monsoon-driven farm output. This marks the weakest CPI rise since June 2017 and highlights both the central bank's room to maintain a growth-supportive monetary policy and the potential downside risk to farm incomes. A Mint poll of 22 economists had projected July inflation at 1.4%, close to the actual print.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,205.3	24,418.3	24,560.5	24,773.5	24,915.6

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
APOLLOHOSP	10.40%
CIPLA	5.26%
TATAMOTORS	4.88%
ADANIENT	4.75%
DRREDDY	4.04%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ADANI PORTS	-1.86%
BAJFINANCE	-1.79%
TATASTEEL	-1.68%
INDUSINDBK	-1.62%
BRITANNIA	-1.57%

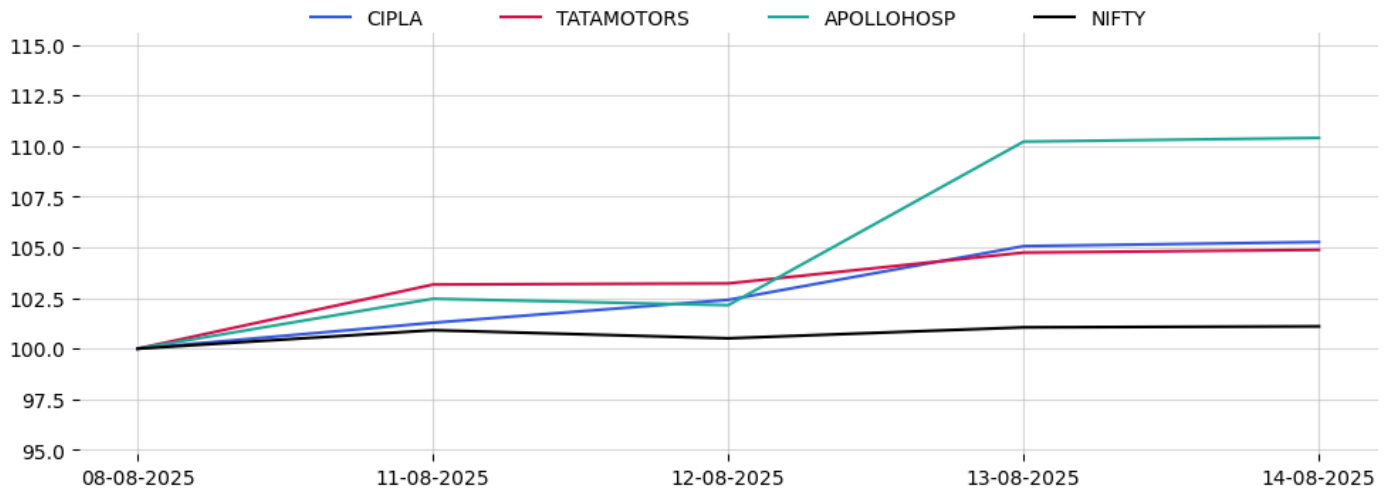
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
BHARTIARTL	2,28,73,697
TATASTEEL	2,23,33,806
TATAMOTORS	1,04,88,023

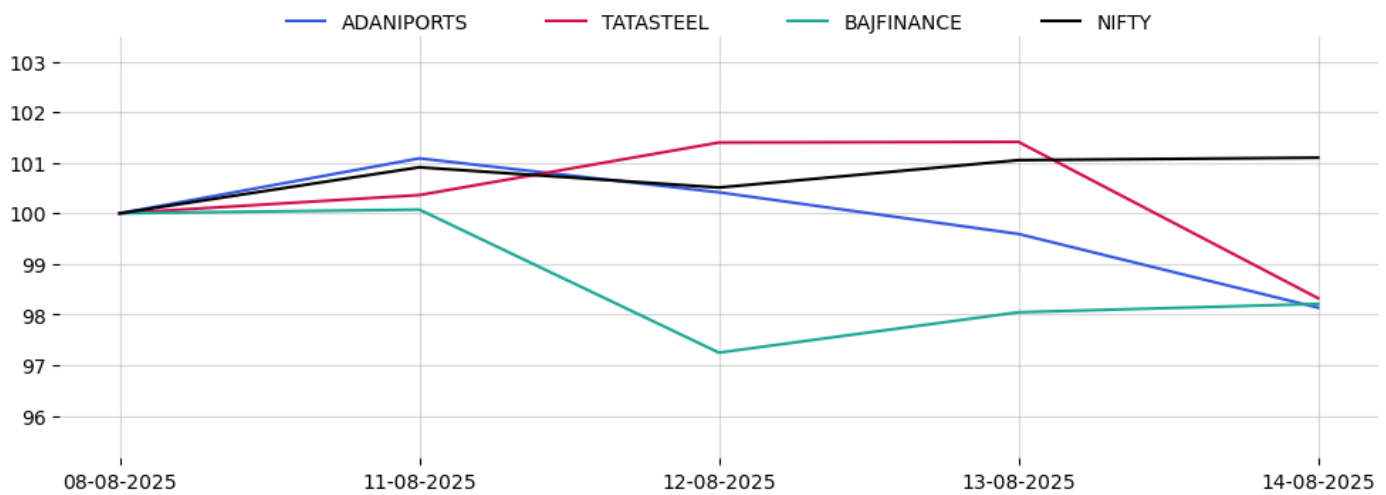
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



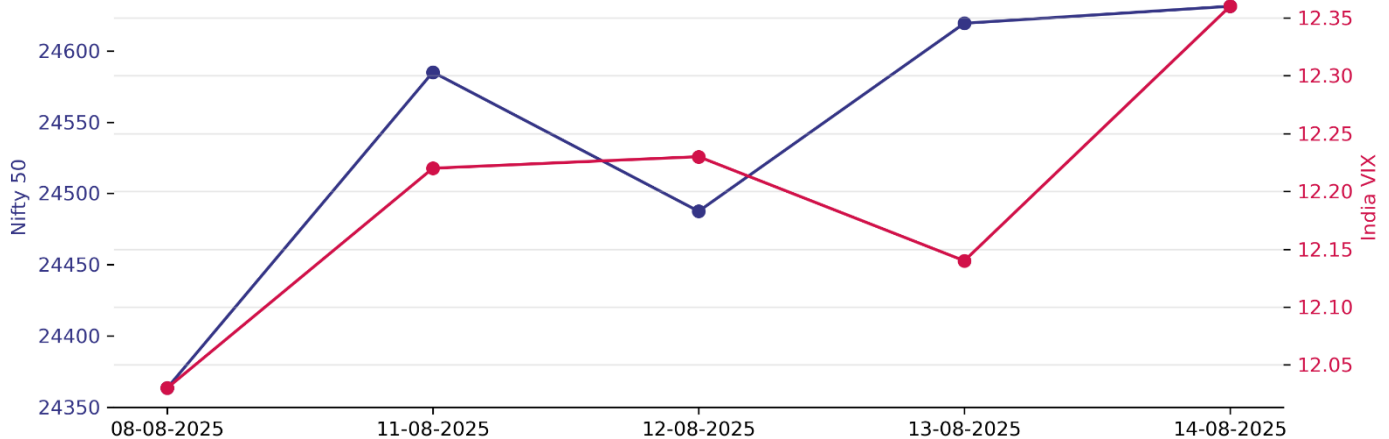
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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