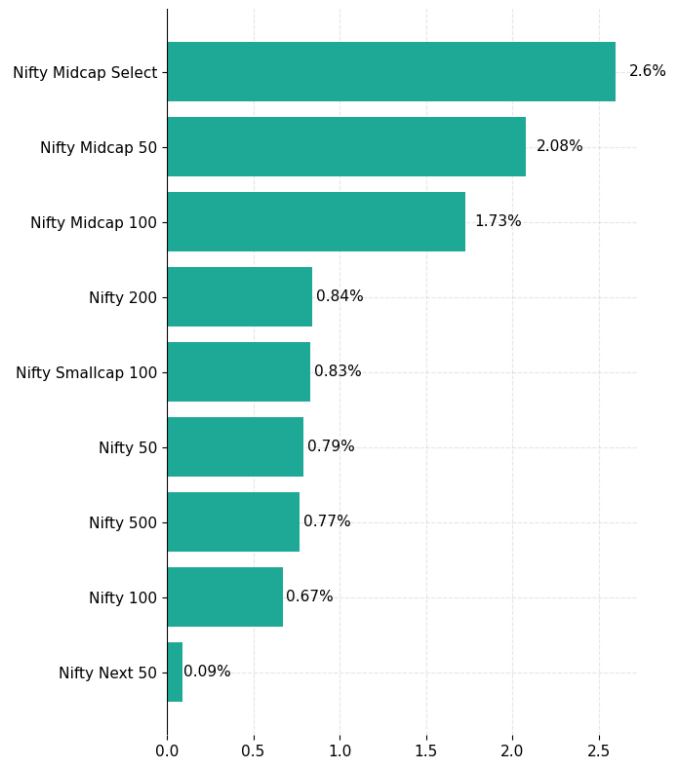


## Indices Performance

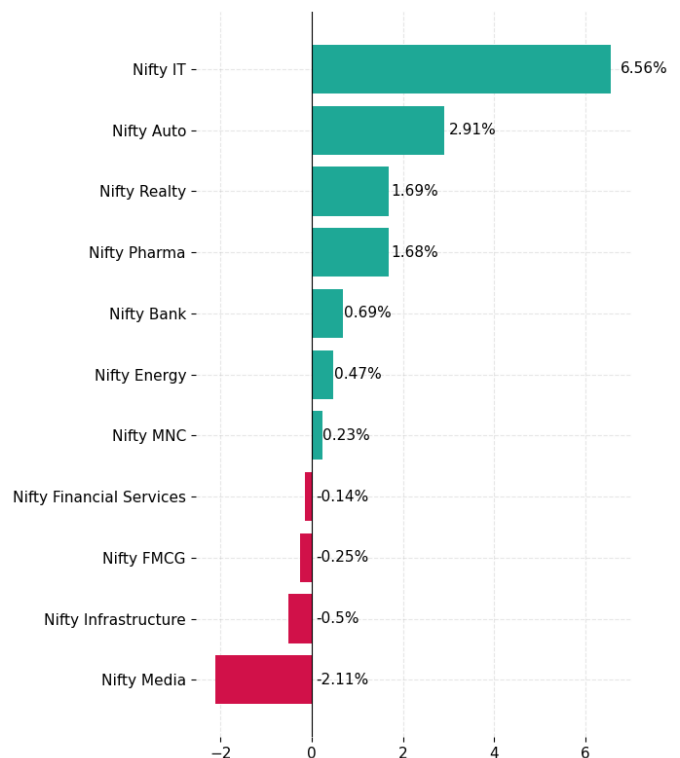
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 0.79% this week. The IT, Auto, and Realty sectors contributed significantly to the rise in the index.
- Nifty 100 registered a 0.67% positive return this week. The top gainers in the index were TECHM, INDUSINDBK, and HCLTECH.
- Nifty Next 50 registered a positive return of 0.09% this week. LODHA, CGPOWER, and DIVISLAB were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 2.60% and 2.08%, respectively. The top contributors to the midcap index were COFORGE, MPHASIS, and OFSS.
- The Nifty Smallcap 100 index posted a positive return of 0.83% this week, led by DELHIVERY, NEWGEN, and ATUL.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 31:19, down from last week's ADR of 49:1.



Source: NSE, INVES 21 Research

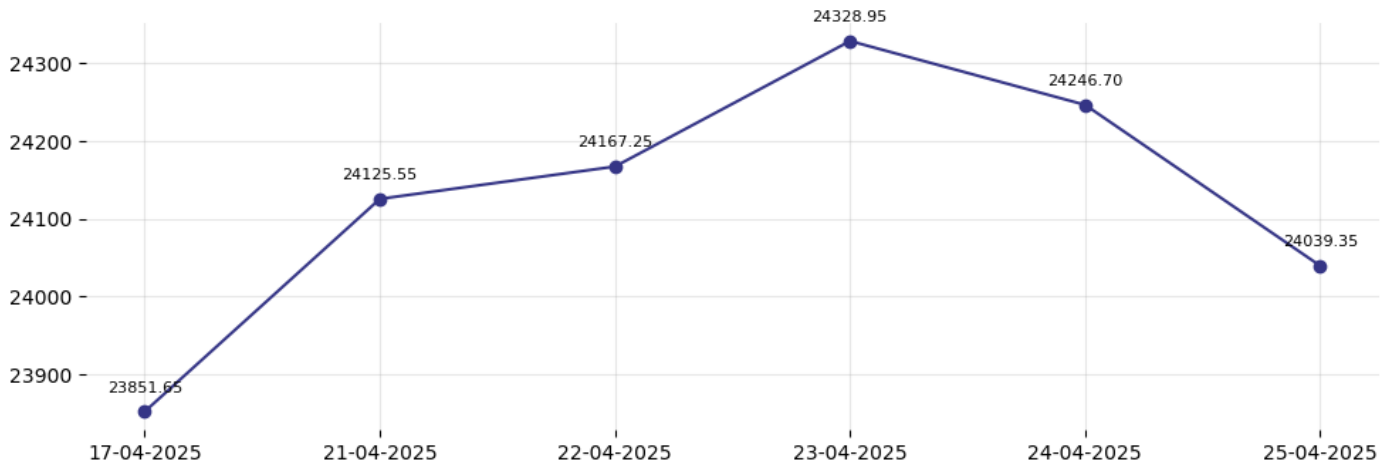
## Sectoral Performance

- This week, 7 out of 11 major market sectoral indices posted a positive return.
- Nifty IT registered a positive return of 6.56%. COFORGE, TECHM, and PERSISTENT led to positive returns in the index.
- Nifty Auto posted a positive return of 2.91% this week. M&M, TVSMOTOR, and TATAMOTORS were major contributors to the index.
- Nifty Realty registered a positive return of 1.69%, led by LODHA, PRESTIGE, and BRIGADE.
- Nifty Pharma posted a positive return of 1.68% this week. The major contributors to the index were NATCOPHARM, DIVISLAB, and LUPIN.
- Nifty Bank posted a positive return of 0.69% this week. AUBANK, INDUSINDBK, and IDFCFIRSTB were the top gainers in the index.
- Nifty FMCG posted a negative return this week; the index was down by -0.25%. COLPAL, TATACONSUM, and GODREJCP were the top gainers in the index.



Source: NSE, INVES 21 Research

## Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

## FII and DII Activity

FII showed an inflow of ₹17,796.39 crore this week. The week ending April 18 saw an inflow of ₹14,670.14 crore. DII showed a net buying of ₹1,131.81 crore this week. DIIs had a net selling of ₹-6,470.52 crore last week.

Participant	Amount (Cr.)
FII	17,796.39
DII	1,131.81

Data: Cash Market; Source: NSE, NSDL

## Economic Events

In a significant relief to the banking sector, the Reserve Bank of India (RBI) has finalised new liquidity coverage ratio (LCR) guidelines, allowing banks to maintain a lower stock of liquid assets against deposits raised through digital channels. Under the revised rules, banks will assign a run-off factor of 7.5% on stable retail deposits enabled via internet and mobile banking, down from the initially proposed 10%. In comparison, less stable deposits will have a 12.5% run-off factor. Funding from non-financial entities like trusts, partnerships, and LLPs will now attract a 40% run-off rate instead of 100%, freeing up capital and easing LCR compliance.

According to a Bloomberg report, India and the United States have agreed on a framework to initiate formal negotiations for a comprehensive trade deal covering 19 key sectors, including agriculture, e-commerce, data storage, and critical minerals. The discussions will now move to sensitive areas such as market access for US agricultural products, India's data localisation rules, and the influence of big tech companies in e-commerce. This set a roadmap for a potential agreement between the two countries.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
23,566.6	23,803.0	24,084.2	24,320.6	24,601.8

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
TECHM	11.88%
HCLTECH	9.75%
M&M	6.90%
TATAMOTORS	5.42%
SBILIFE	5.40%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
SHRIRAMFIN	-5.28%
ADANI PORTS	-5.27%
BHARTIARTL	-3.81%
ADANI ENT	-2.64%
HDFCLIFE	-2.15%

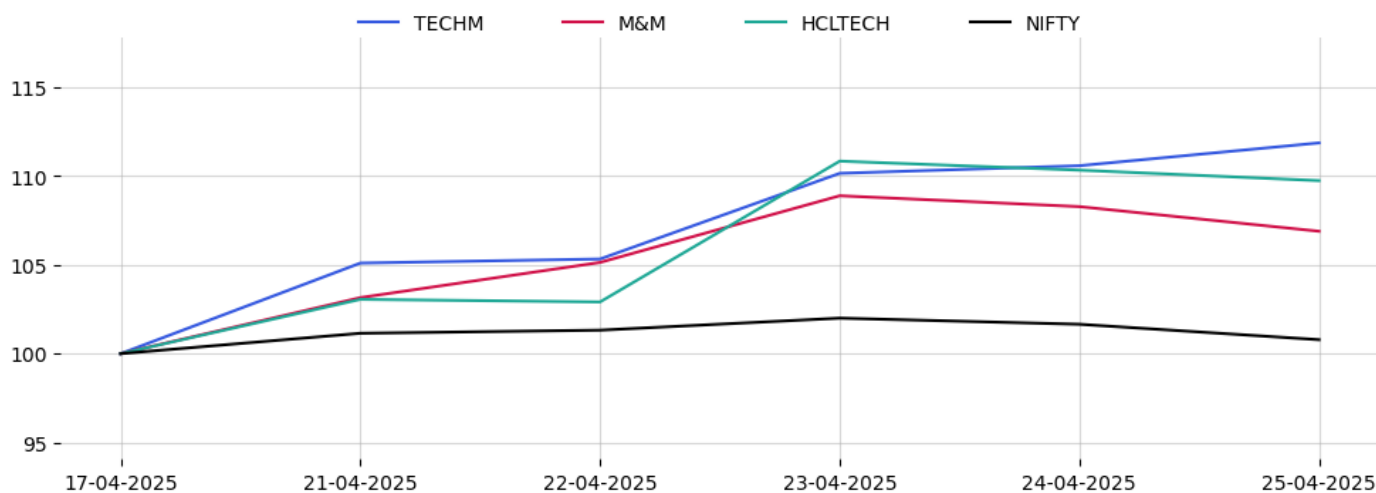
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	4,09,82,241
WIPRO	2,68,43,465
ITC	2,50,67,529

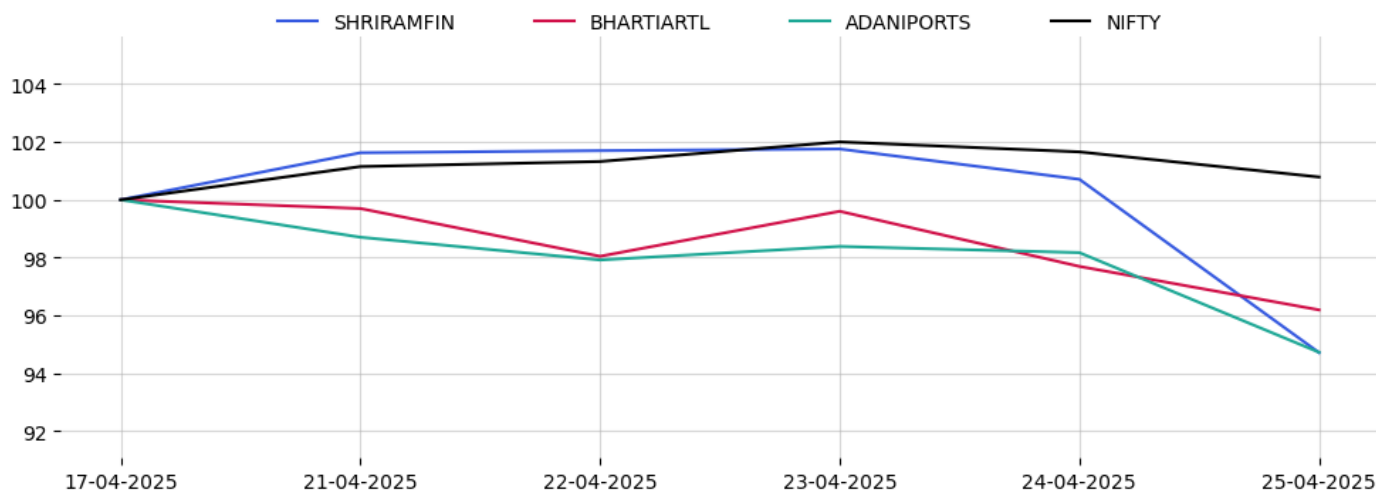
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



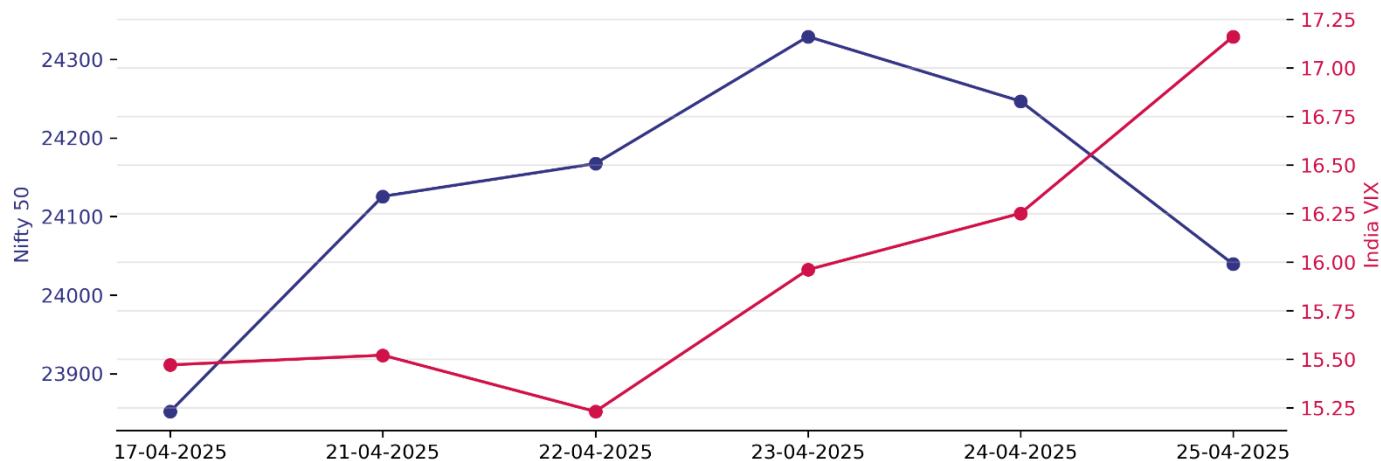
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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