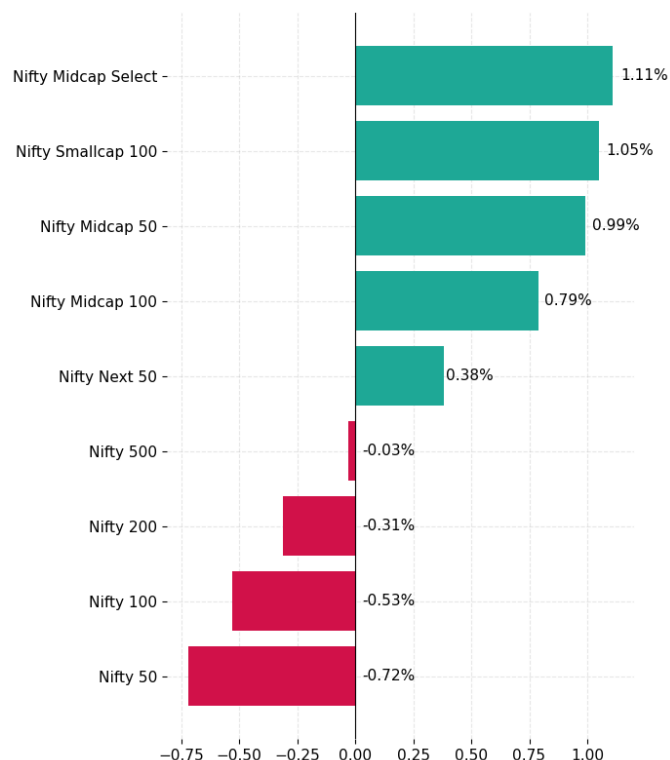


Indices Performance

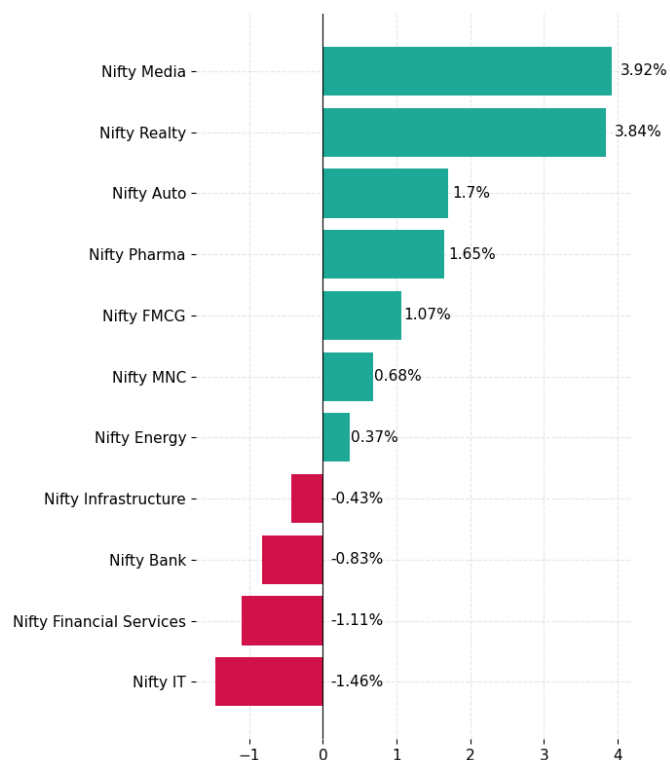
- This week, 5 out of 9 major market indices posted a positive return.
- The Nifty 50 index was down by -0.72% this week. The IT, Financial Services, and Banking sectors contributed significantly to the drop in the index.
- Nifty 100 registered a negative -0.53% return this week. The top losers in the index were MOTHERSON, HAL, and ICICIPRULI.
- Nifty Next 50 registered a positive return of 0.38% this week. VBL, TORNTPHARM, and BOSCHLTD were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 1.11% and 0.99%, respectively. The top contributors to the midcap index were HDFCAMC, IDEA, and DIXON.
- The Nifty Smallcap 100 index posted a positive return of 1.05% this week, led by NEULANLAB, PEL, and SWANENERGY.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 25:25, significantly down from last week's ADR of 13:37.



Source: NSE, INVES 21 Research

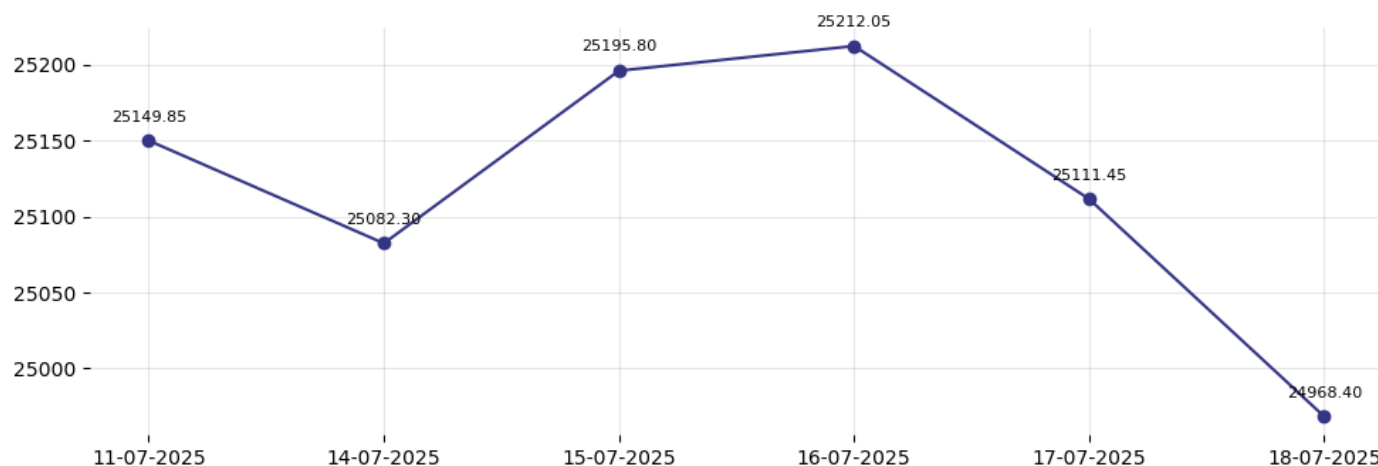
Sectoral Performance

- This week, only 7 out of 11 major market sectoral indices posted a positive return. Nifty Media posted the highest positive return, followed by the Nifty Realty.
- Nifty Media registered a positive return of 3.92%. NETWORK18, NAZARA, and DISHTV led to positive returns in the index.
- Nifty Realty posted a positive return of 3.84% this week. SOBHA, ANANTRAJ, and GODREPROP were major contributors to the index.
- Nifty Pharma registered a positive return of 1.65%, led by BIOCON, GLAND, and LAURUSLAB.
- Nifty FMCG posted a positive return of 1.07% this week. The major contributors to the index were PATANJALI, VBL, and RADICO.
- Nifty Bank posted a negative return of -0.83% this week. AXISBANK, KOTAKBANK, and IDFCFIRSTB were the top losers in the index.
- Nifty IT posted a negative return this week; the index was down by -1.46%. HCLTECH, PERSISTENT, and TECHM 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 ₹-6,671.57 crore this week. The week ending July 11 saw an outflow of ₹-4,511.12 crore. DII showed a net buying of ₹9,490.54 crore this week. DIIs had a net buying of ₹8,291.00 crore last week.

Participant	Amount (Cr.)
FII	-6,671.57
DII	9,490.54

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's retail inflation, measured by the Consumer Price Index (CPI), fell to a multi-year low of 2.10% in June 2025, marking the lowest year-on-year rise since January 2019, according to data released by the Ministry of Statistics and Programme Implementation (MoSPI) on July 14. This sharp decline was primarily driven by a significant easing in food prices, with food inflation also registering its lowest level in over six years. The data reflects a continued softening of price pressures in the economy, providing relief to consumers and supporting expectations of a stable inflationary environment.

India's food inflation entered the negative zone at -1.06% in June 2025, marking its lowest level since January 2019, as per year-on-year data released by the Ministry of Statistics and Programme Implementation (MoSPI). The sharp decline was attributed to a fall in prices of key food items, including vegetables, pulses, meat, cereals, sugar, milk, and spices. The ministry noted that both the favourable base effect and broad-based easing across essential food categories contributed to the steep drop in food inflation, reinforcing the overall decline in headline CPI.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,710.8	24,839.6	25,047.5	25,176.3	25,384.1

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
HEROMOTOCO	4.22%
M&M	3.88%
BAJAJ-AUTO	3.48%
WIPRO	3.35%
NESTLEIND	2.86%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
AXISBANK	-6.35%
HCLTECH	-4.72%
BEL	-3.55%
KOTAKBANK	-3.50%
SHRIRAMFIN	-3.40%

Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	2,01,46,575
BEL	1,38,76,603
WIPRO	1,37,04,199

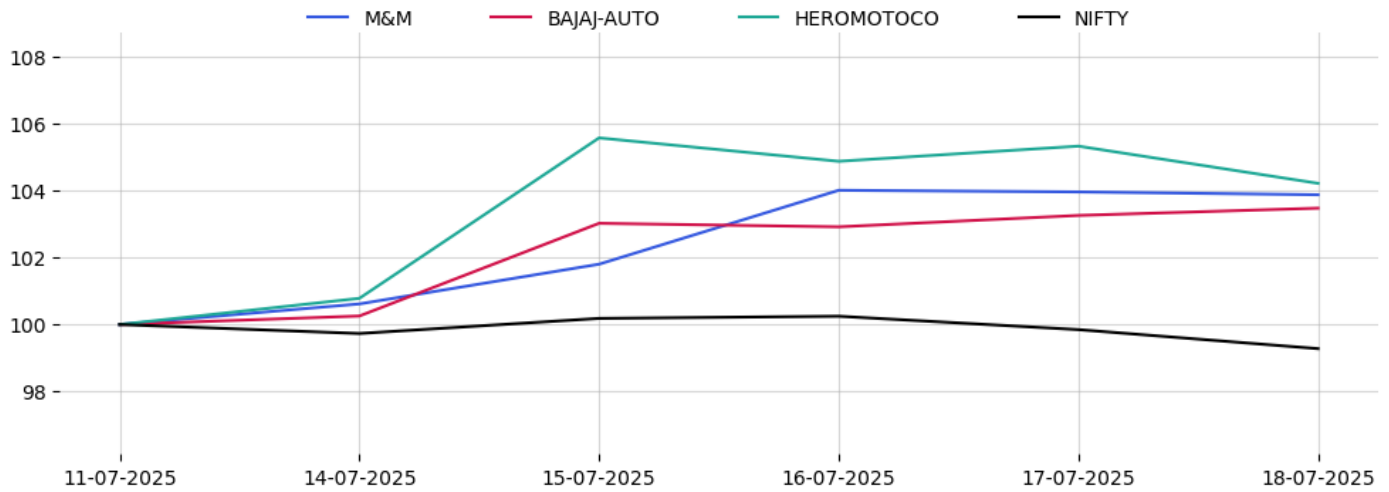
Source: NSE, INVES 21 Research

Weekly Market Review

18 July 2025

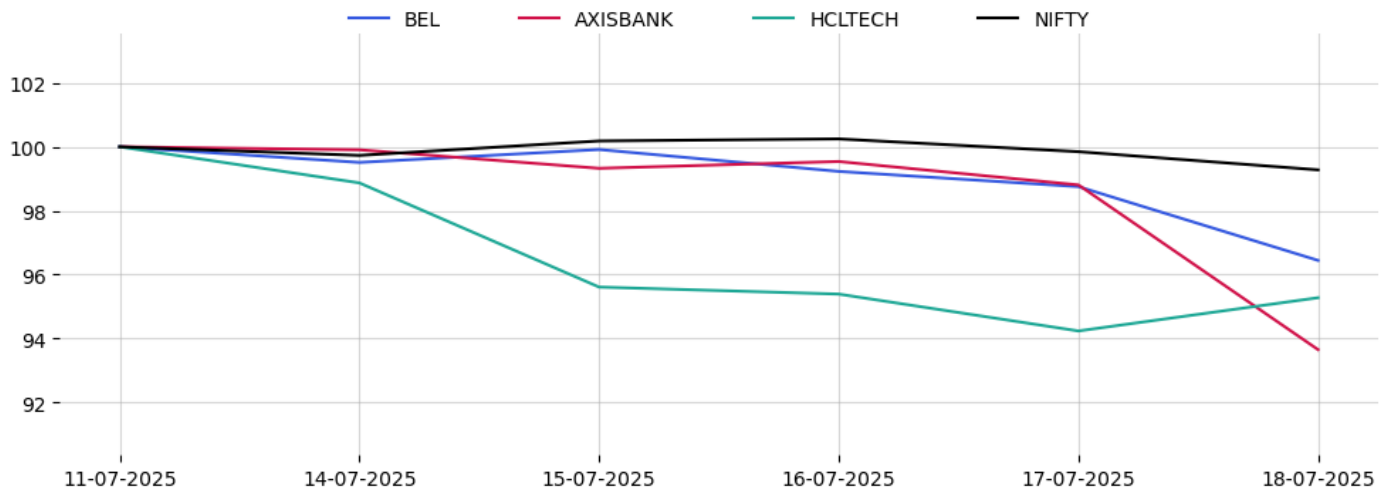
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Top 3 Outperformers of the week



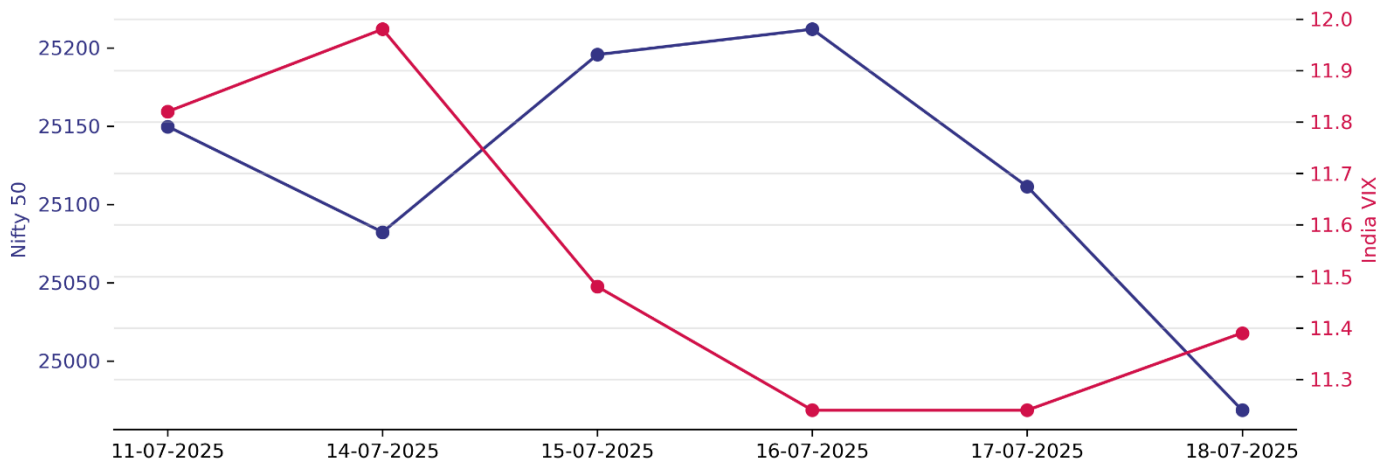
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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