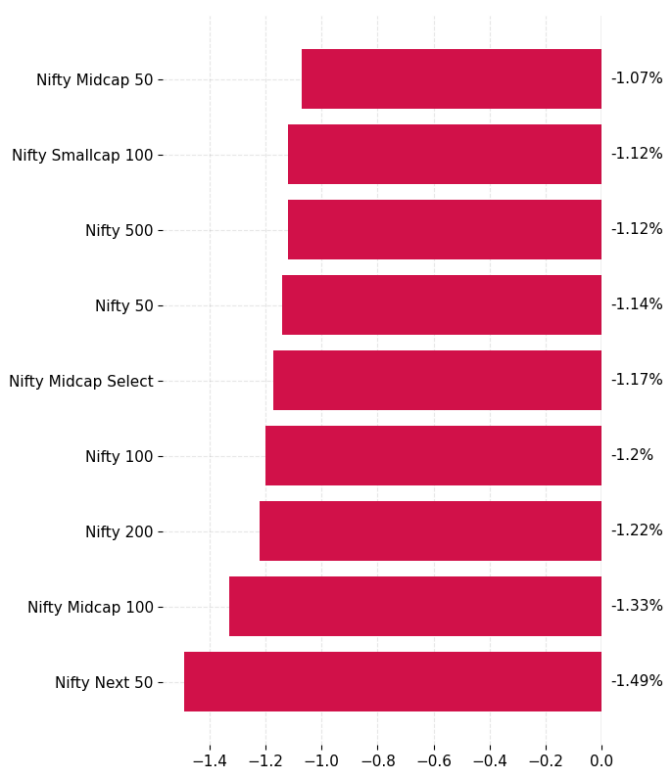


Indices Performance

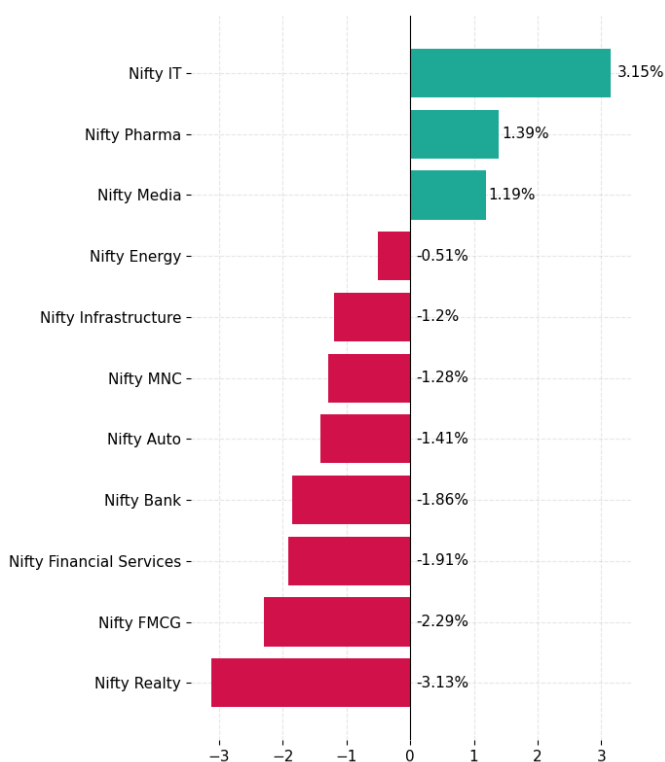
- This week, all major market indices posted negative returns.
- The Nifty 50 index was down by -1.14% this week. The Realty, FMCG, and Banking sectors contributed significantly to the fall in the index.
- Nifty 100 registered a negative -1.20% return this week. The top losers in the index were BANKBARODA, GODREJCP, and ICICIPRULI.
- Nifty Next 50 registered a negative return of -1.49% this week. UNITDSPR, SWIGGY, and LODHA were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -1.17% and -1.07%, respectively. The top contributors to the midcap index were HINDPETRO, BHEL, and YESBANK.
- The Nifty Smallcap 100 index posted a negative return of -1.12% this week, led by the ZENTEC, BLS, and KAYNES.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 17:33, significantly down from last week's ADR of 38:12.



Source: NSE, INVES 21 Research

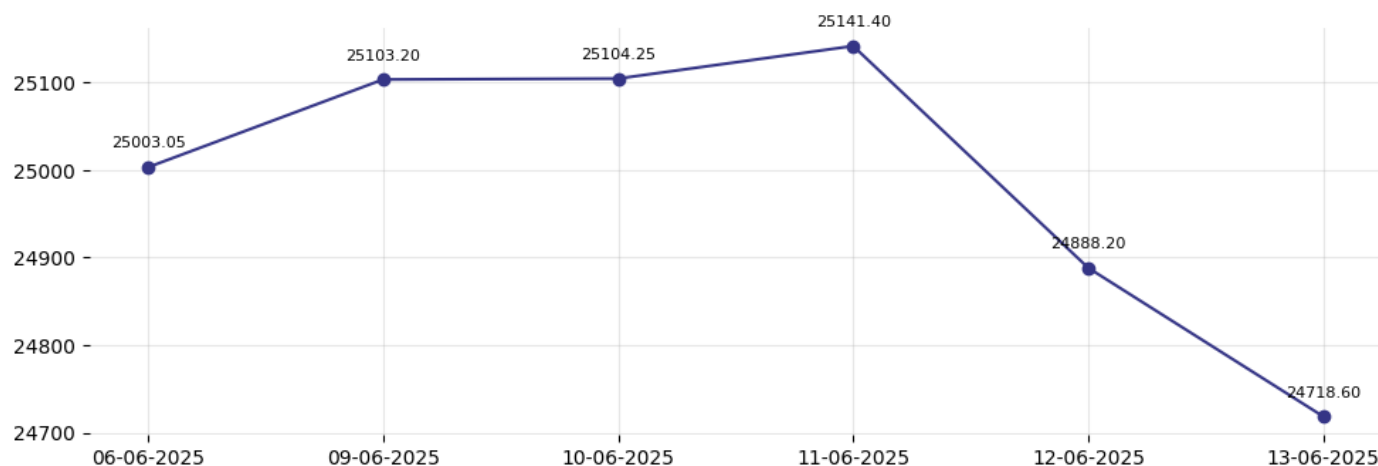
Sectoral Performance

- This week, 8 out of 11 major sectoral indices posted negative returns. Nifty IT posted the highest positive return, while Nifty Realty and FMCG posted negative returns this week.
- Nifty IT registered a positive return of 3.15%. PERSISTENT, OFSS, and MPHASIS led to positive returns in the index.
- Nifty Pharma posted a positive return of 1.39% this week. LAURUSLABS, AJANTAPHARM, and BIOCON were major contributors to the index.
- Nifty Auto registered a negative return of -1.41%, led by the TIINDA, ASHOKLEY, and M&M.
- Nifty Bank posted a negative return of -1.86% this week. The major contributors to the index were ICICBANK, BANKBARODA, and PNB.
- Nifty FMCG posted a negative return of 0.94% this week. RADICO, UNITDSPR, and TATACONSUM were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -3.13%. BRIGADE, PRESTIGE, and DLF 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 ₹-1,246.51 crore this week. The week ending June 6 saw an inflow of ₹-3,565.88 crore. DII showed a net buying of ₹18,637.29 crore this week. DIIs had a net buying of ₹25,513.43 crore last week.

Participant	Amount (Cr.)
FII	-1,246.51
DII	18,637.29

Data: Cash Market; Source: NSE, NSDL

Economic Events

Retail inflation in India eased to a six-year low of 2.82% in May, driven by a sharp moderation in food prices, according to provisional data from the Ministry of Statistics and Programme Implementation. This marks the fourth consecutive month of sub-4% Consumer Price Index (CPI)-based inflation, the longest such streak in at least five years, and significantly lower than 3.16% in April and 4.8% in May last year. The sustained decline in inflation comes just after the Reserve Bank of India's Monetary Policy Committee cut the repo rate by 50 basis points to 5.5%, marking a cumulative 100 basis point reduction since February.

Equity mutual fund inflows fell to a one-year low of ₹19,013.12 crore in May, down 21.66% from April, as per AMFI data. Largecap funds saw a sharp 53.19% drop in net inflows to ₹1,250.47 crore, while midcap fund inflows declined 15.25% to ₹2,808.68 crore, indicating a broad pullback in investor sentiment across equity categories. Smallcap funds also saw inflows soften by 19.64%, down to ₹3,214.21 crore, as investors became more cautious amid market uncertainties.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,055.3	24,386.9	24,804.7	25,136.3	25,554.1

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
TECHM	5.59%
ONGC	4.77%
WIPRO	4.67%
HCLTECH	3.52%
GRASIM	3.47%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ADANI PORTS	-4.07%
TITAN	-3.88%
POWERGRID	-3.48%
TATASTEEL	-3.40%
TATACONSUM	-3.33%

Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	2,22,67,855
BEL	2,11,20,909
ONGC	1,95,21,272

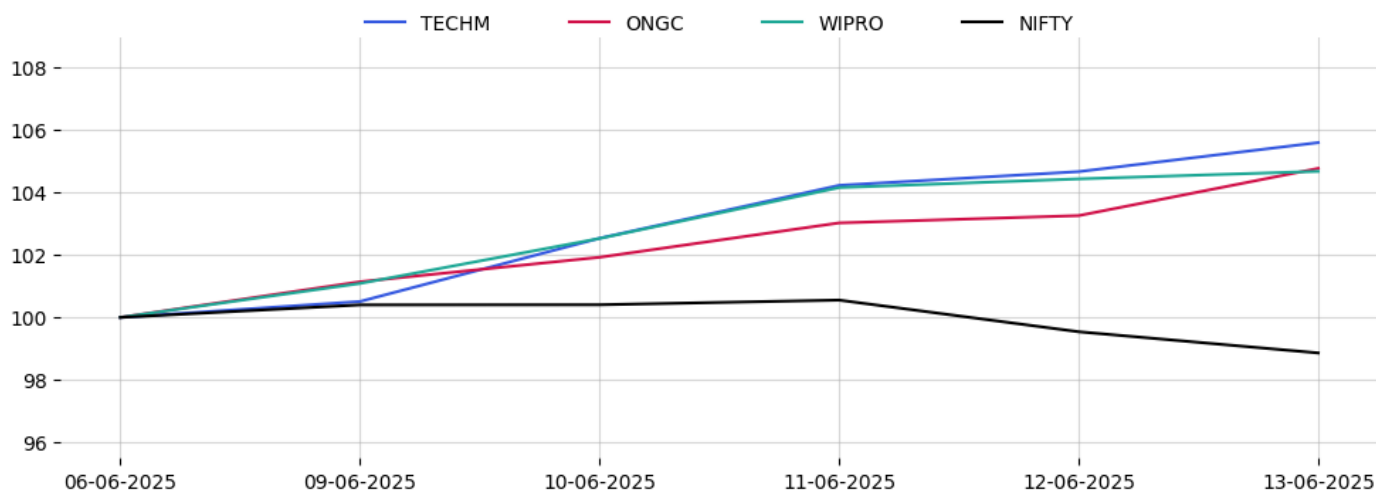
Source: NSE, INVES 21 Research

Weekly Market Review

14 June 2025

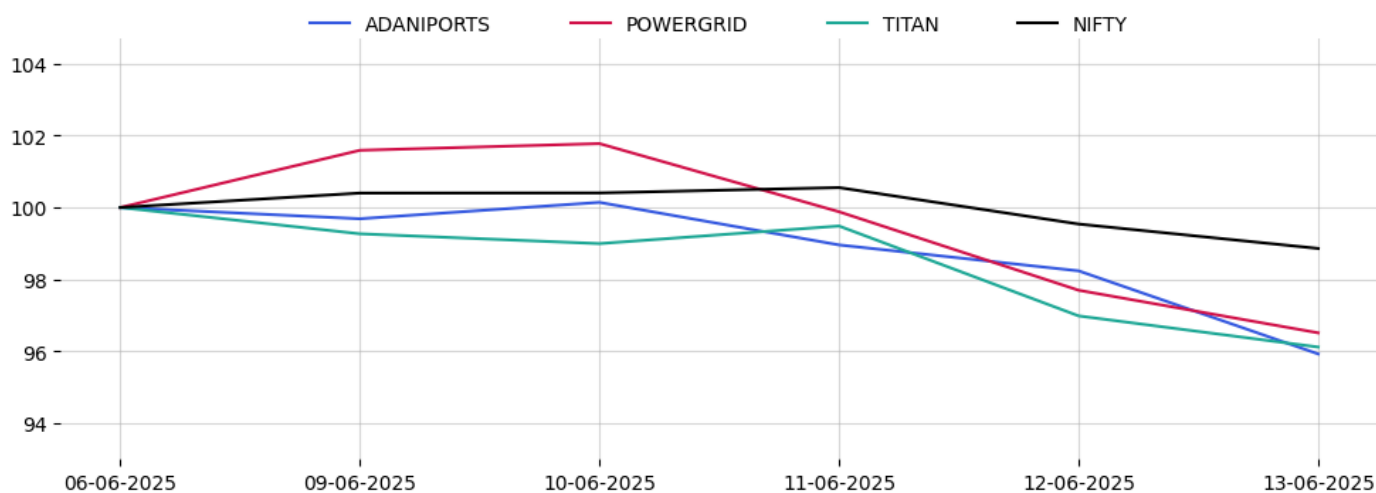
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The Future of Financial Services

Top 3 Outperformers of the week



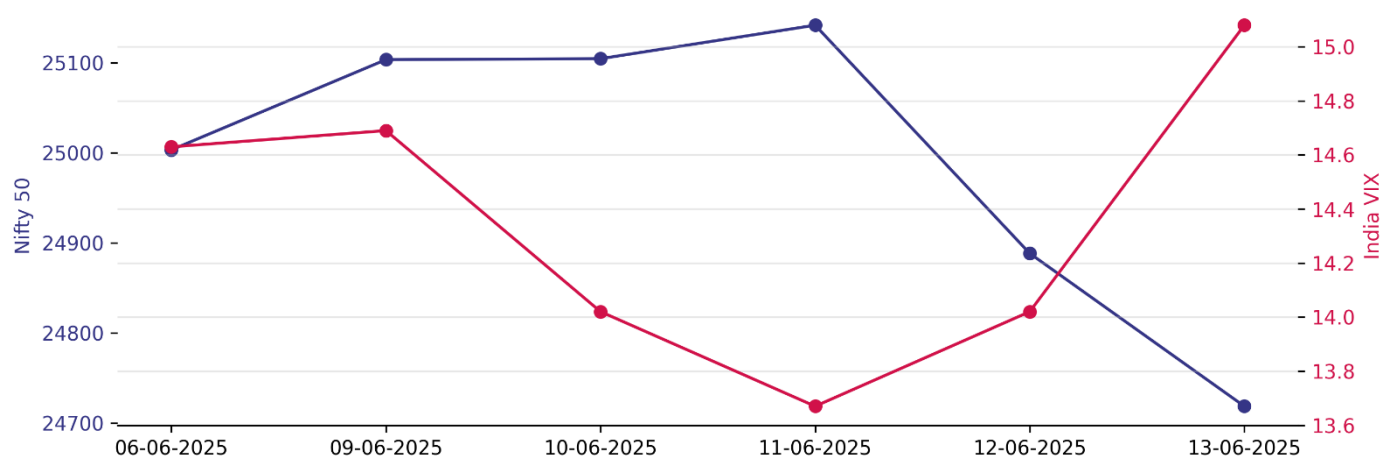
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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