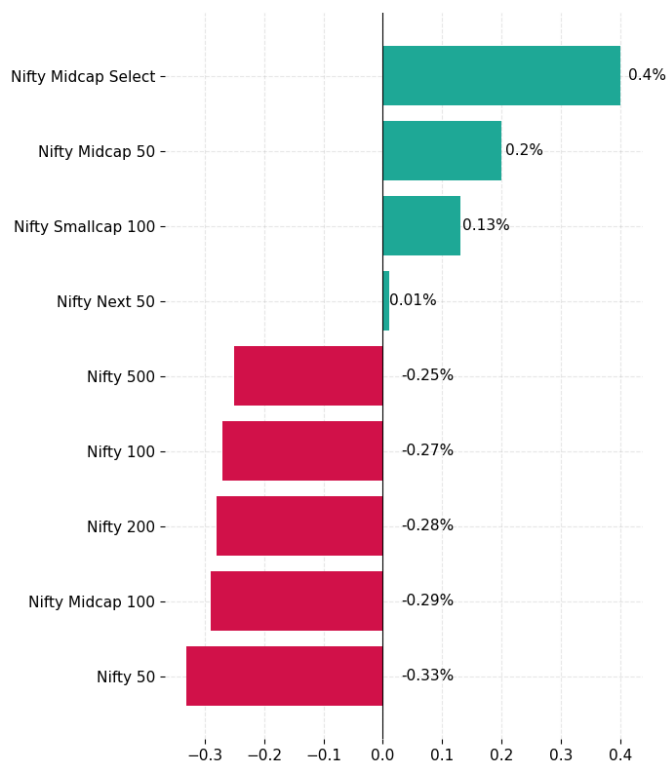


## Indices Performance

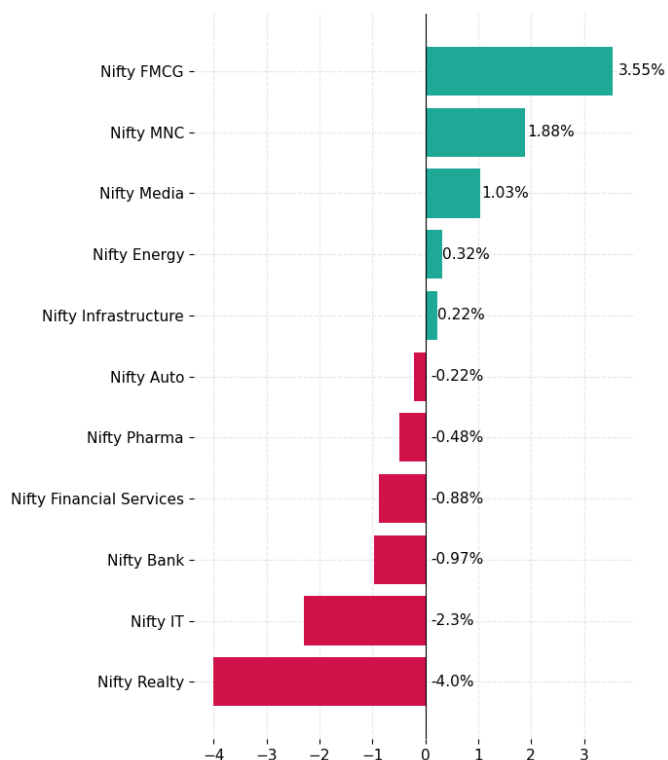
- This week, only 4 out of 9 major market indices posted a positive return.
- The Nifty 50 index was down by -0.33% this week. The Realty, IT, and Banking sectors contributed significantly to the fall in the index.
- Nifty 100 registered a -0.27% negative return this week. The top losers in the index were TRENT, MOTHERSON, and HINDALCO.
- Nifty Next 50 registered a positive return of 0.01% this week. TATACONSUM, ETERNAL, and GODREJCP were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 0.40% and 0.20%, respectively. The top contributors to the midcap index were DIXON, MARICO, and HINDPETRO.
- The Nifty Smallcap 100 index posted a positive return of 0.13% this week, led by AADHARHFC, GSPL, and MCX.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 29:21, significantly up from last week's ADR of 14:36.



Source: NSE, INVES 21 Research

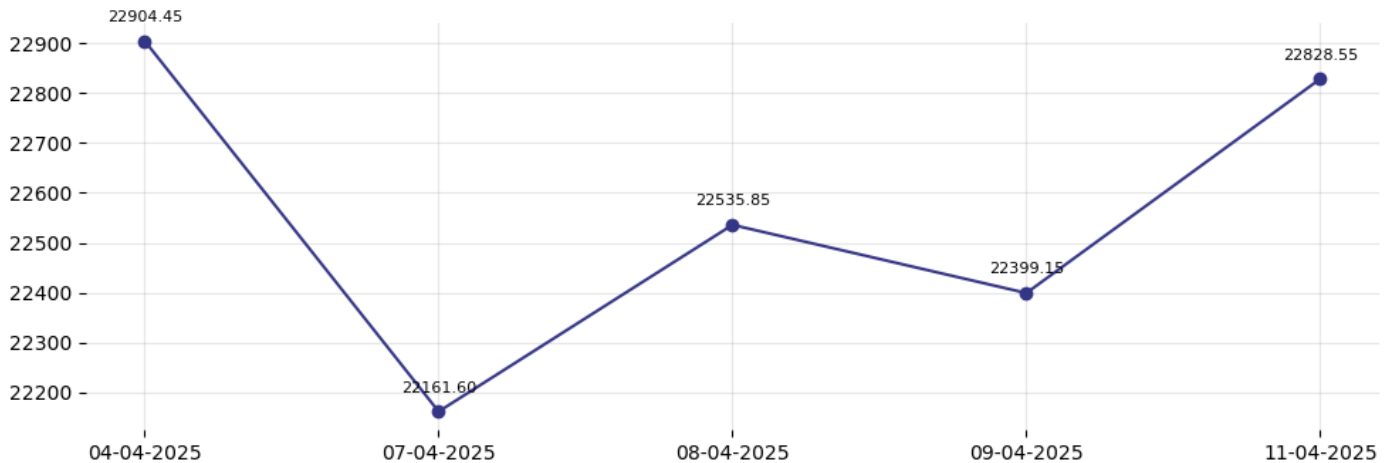
## Sectoral Performance

- This week, 5 out of 11 major sectoral indices posted a positive return.
- Nifty FMCG registered a positive return of 3.55%. BRITANNIA, NESTLEIND, and HINDUNILVR led to positive returns in the index.
- Nifty Media posted a positive return of 1.03% this week. SUNTV, ZEEL, and NAZARA were major contributors to the index.
- Nifty Energy registered a positive return of 0.32%, led by GSPL, HINDPETRO, and POWERGRID.
- Nifty Bank posted a negative return of -0.97% this week. The major contributors to the index were AUBANK, IDFCFIRSTB, and HDFCBANK.
- Nifty IT posted a negative return of -2.30% this week. COFORGE, PERSISTENT, and MPHASIS were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -4.00%. ANANTRAJ, DLF, and PHOENIXLTD 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 ₹-20,911.30 crore this week. The week ending April 4 saw an outflow of ₹-13,730.49 crore. DII showed a net buying of ₹21,955.62 crore this week. DIIs had a net buying of ₹5,632.56 crore last week.

Participant	Amount (Cr.)
FII	5,819.12
DII	10,742.35

Data: Cash Market; Source: NSE, NSDL

## Economic Events

The Reserve Bank of India (RBI), in its first bi-monthly monetary policy for FY26 announced on April 9, 2025, cut the repo rate by 25 basis points to 6.0%, marking the second consecutive rate reduction under Governor Sanjay Malhotra. The Monetary Policy Committee (MPC) also shifted its stance from 'neutral' to 'accommodative', signaling a willingness to ease rates further if needed. This decision comes amid cooling inflation, easing oil prices, and rising global uncertainties stemming from US tariff hikes and fears of a global recession.

Alongside the rate cut, the MPC revised its inflation projection for 2025-26 downward from 4.2% to 4.0%, bringing it in line with the RBI's target of maintaining inflation around 4%. The quarterly inflation projections are now estimated at 3.6% for Q1, 3.9% for Q2, 3.8% for Q3, and 4.4% for Q4. According to the Monetary Policy Report released with the MPC resolution, inflation and GDP growth for 2026-27 are projected at 4.3% and 6.7%, respectively. The downward revision in inflation is largely attributed to softening food prices and declining global crude oil prices, which the MPC noted as positive for the inflation outlook.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
21,318.5	22,073.5	22,498.7	23,253.8	23,679.0

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
BRITANNIA	6.51%
HINDUNILVR	5.42%
TITAN	5.16%
BPCL	4.92%
NESTLEIND	4.39%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TRENT	-14.06%
TATASTEEL	-4.96%
LT	-4.42%
TATAMOTORS	-3.06%
TECHM	-2.93%

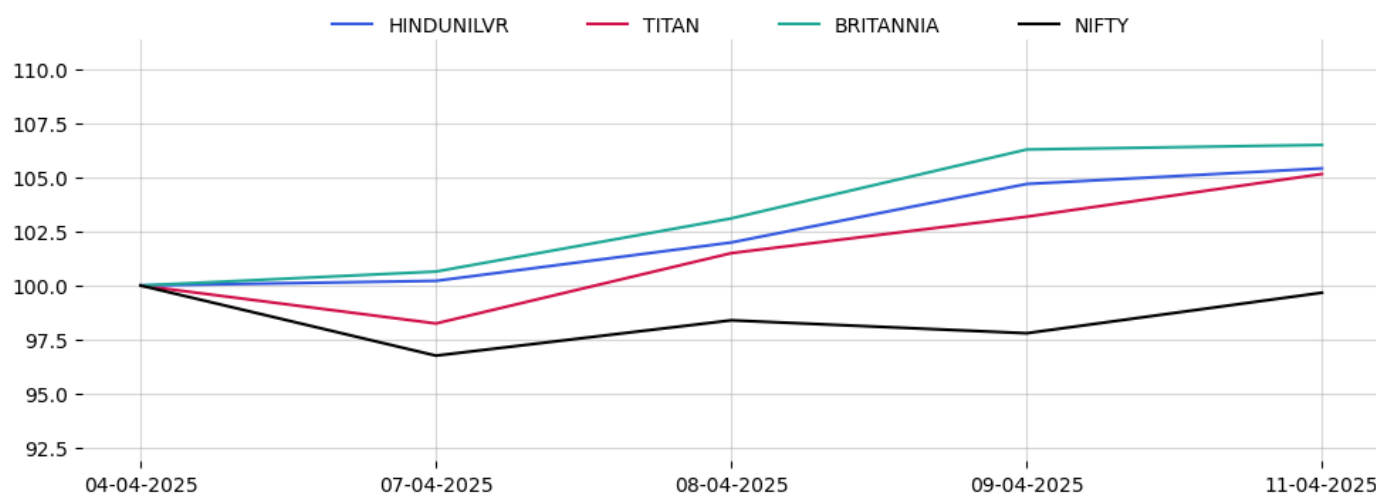
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
TATASTEEL	8,37,51,623
TATAMOTORS	2,71,22,372
ONGC	2,14,89,087

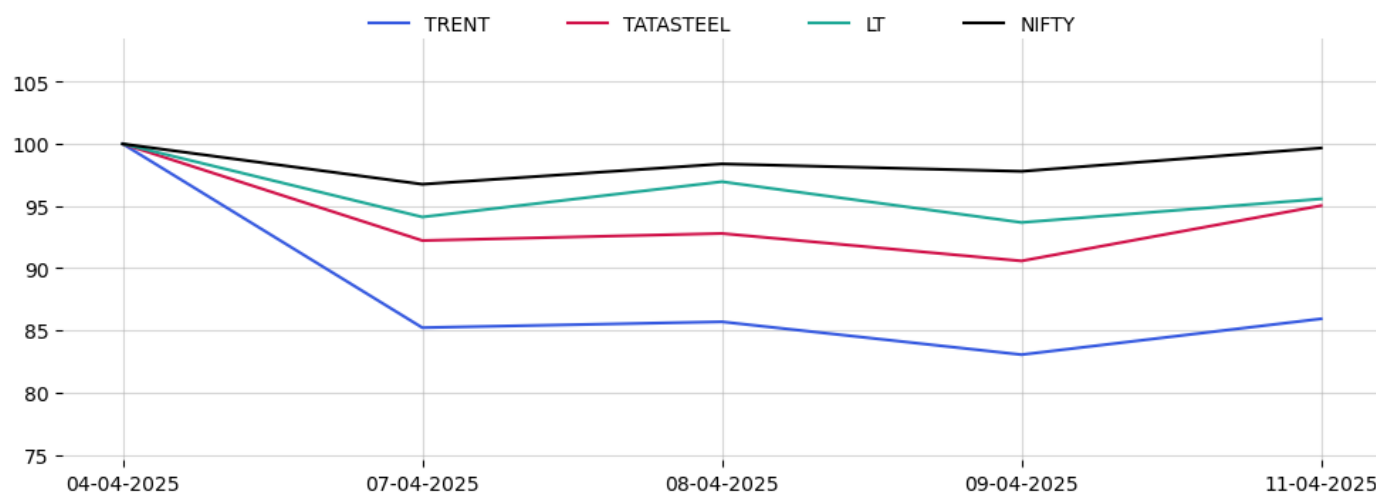
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



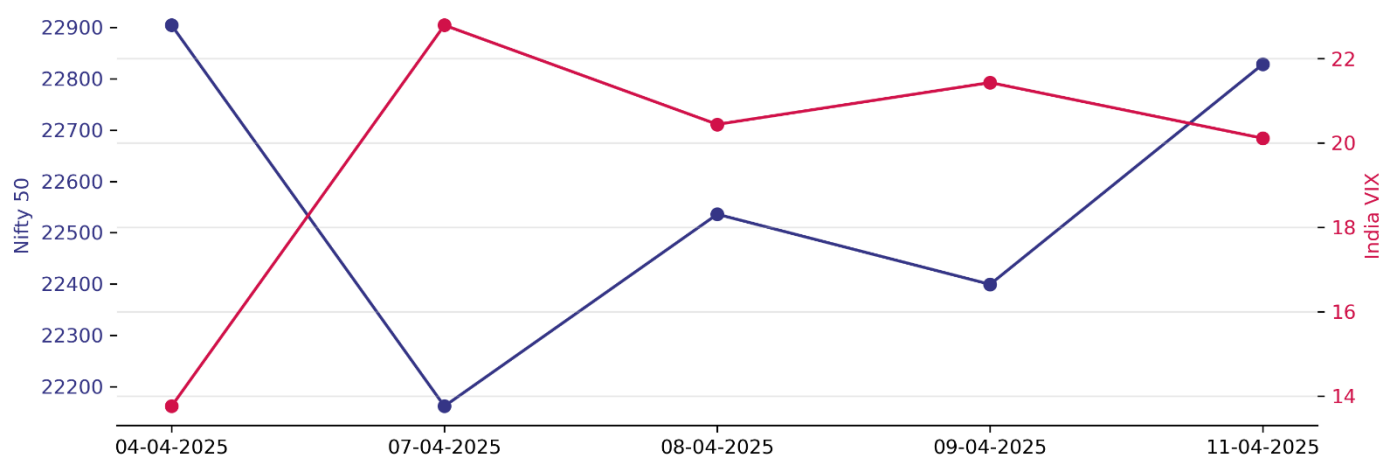
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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**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. Raju N H N | E-mail: [compliance@inves21.com](mailto:compliance@inves21.com), Tel No. 040- 48444546

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