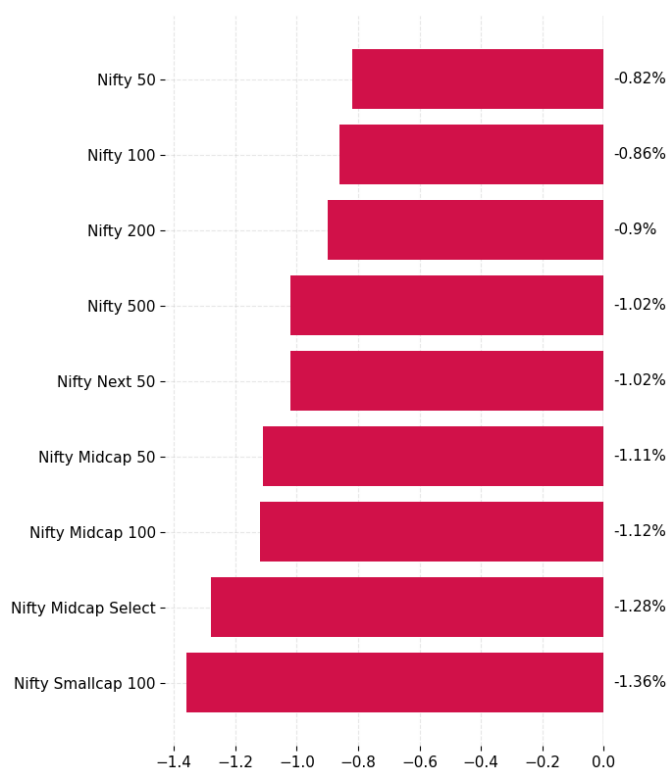


Indices Performance

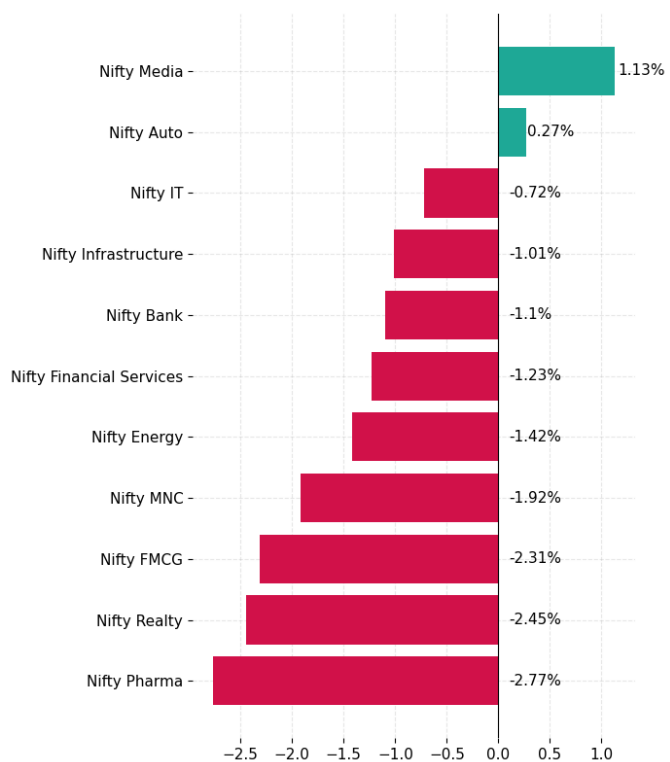
- This week, all of the major market indices posted a negative return. For the continuous sixth week in a row, the Nifty 50 posted a negative return.
- The Nifty 50 index was down by -0.82% this week. The Pharma, Realty, and FMCG sectors contributed significantly to the drop in the index.
- Nifty 100 registered a negative -0.86% return this week. The top losers in the index were ADANIENT, MOTHERSON, and DIVISLAB.
- Nifty Next 50 registered a negative return of -1.02% this week. ABB, BRITANNIA, and GODREJCP were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -1.28% and -1.11%, respectively. The top contributors to the midcap index were INDUSTOWER, AUROPHARMA, and COFORGE.
- The Nifty Smallcap 100 index posted a negative return of -1.36% this week, led by PGEL, PNBHOUSING, and RPOWER.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 24:26, similar to the last week's ADR of 15:35.



Source: NSE, INVES 21 Research

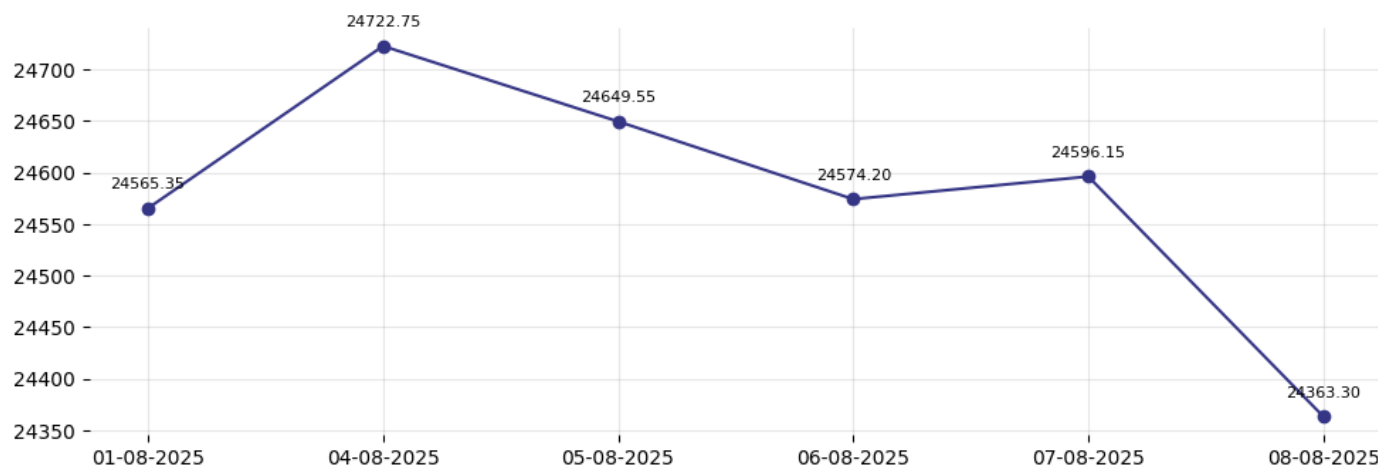
Sectoral Performance

- This week, only 2 out of 11 major market sectoral indices posted a positive return. Nifty Media posted the highest positive return.
- Nifty Auto registered a positive return of 0.27%. MOTHERSON, BALKRISIND, and ASHOKLEY led to positive returns in the index.
- Nifty IT posted a negative return of -0.72% this week. INFY, COFORGE, and WIPRO were major contributors to the index.
- Nifty Bank registered a negative return of -1.01%, led by ICICIBANK, HDFCBANK, and AXISBANK.
- Nifty FMCG posted a negative return of -2.31% this week. The major contributors to the index were BRITANNIA, EMAMILTD, and DABUR.
- Nifty Realty posted a negative return of -2.45% this week. RAYMOND, PHOENIXLTD, and ANANTRAJ were the top losers in the index.
- Nifty Pharma posted a negative return this week; the index was down by -2.77%. BIOCON, GRANULES, and DIVISLAB 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 ₹-10,652.47 crore this week. The week ending Aug 1 saw an outflow of ₹-20,524.22 crore. DII showed a net buying of ₹33,608.66 crore this week. DIIs had a net buying of ₹24,300.05 crore last week.

Participant	Amount (Cr.)
FII	-10,652.47
DII	33,608.66

Data: Cash Market; Source: NSE, NSDL

Economic Events

The Reserve Bank of India (RBI), in its latest Monetary Policy Committee (MPC) meeting, kept the repo rate unchanged at 5.5%. Despite uncertainties arising from US tariff actions and geopolitical tensions, the RBI maintained its real GDP growth forecast for FY26 at 6.5%, with Governor Sanjay Malhotra reaffirming confidence in India's economic resilience, stating it is performing "very well" and poised to "further improve." Notably, the central bank revised its CPI inflation projection for the current fiscal year downward by 60 basis points to 3.1%, from the earlier estimate of 3.7%.

India's gross Goods and Services Tax (GST) collection rose to ₹1.96 lakh crore in July 2025, reflecting a 7.5% year-on-year increase, up from ₹1.85 lakh crore in June. While domestic revenue grew 6.7% to ₹1.43 lakh crore, GST from imports rose 9.5% to ₹52,712 crore. Notably, GST refunds surged 66.8% year-on-year to ₹27,147 crore. Despite the overall growth, net GST revenue registered a modest 1.7% rise, amounting to ₹1.69 lakh crore. April 2025 had earlier witnessed a record-high GST collection of ₹2.37 lakh crore, driven by a 12.6% annual surge.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,080.3	24,221.8	24,479.0	24,620.5	24,877.8

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
HEROMOTOCO	6.68%
TITAN	4.35%
COALINDIA	3.43%
TATASTEEL	3.23%
TECHM	2.89%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ADANIENT	-7.35%
BRITANNIA	-5.87%
NESTLEIND	-3.67%
APOLLOHOSP	-3.63%
INFY	-3.16%

Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	1,94,96,643
BHARTIARTL	1,94,93,934
ITC	1,19,30,105

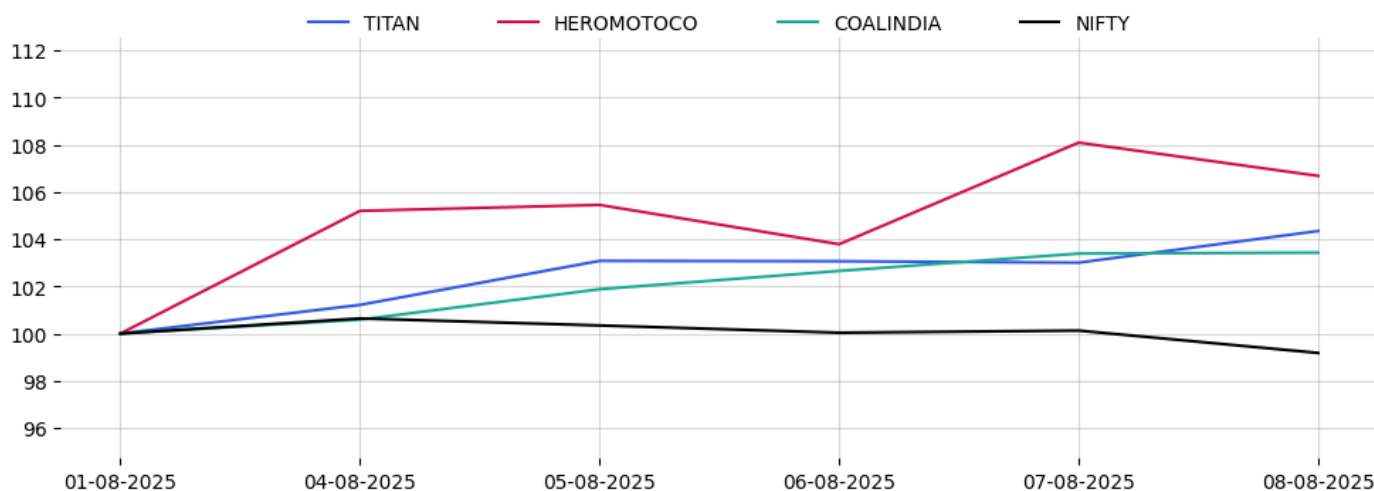
Source: NSE, INVES 21 Research

Weekly Market Review

8 August 2025

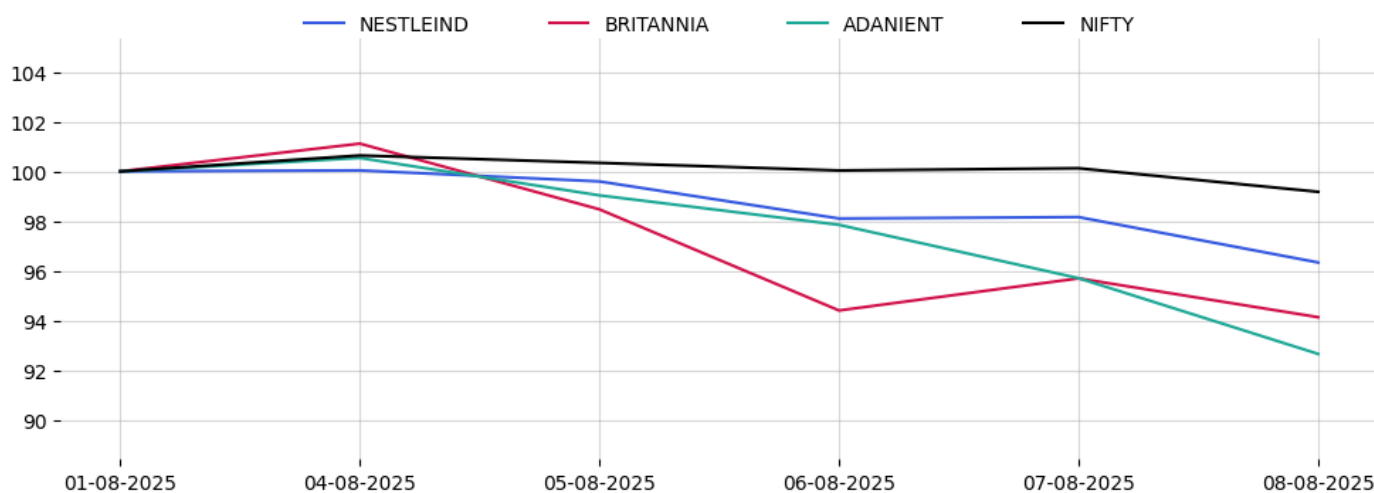
INVES 21
The Future of Financial Services

Top 3 Outperformers of the week



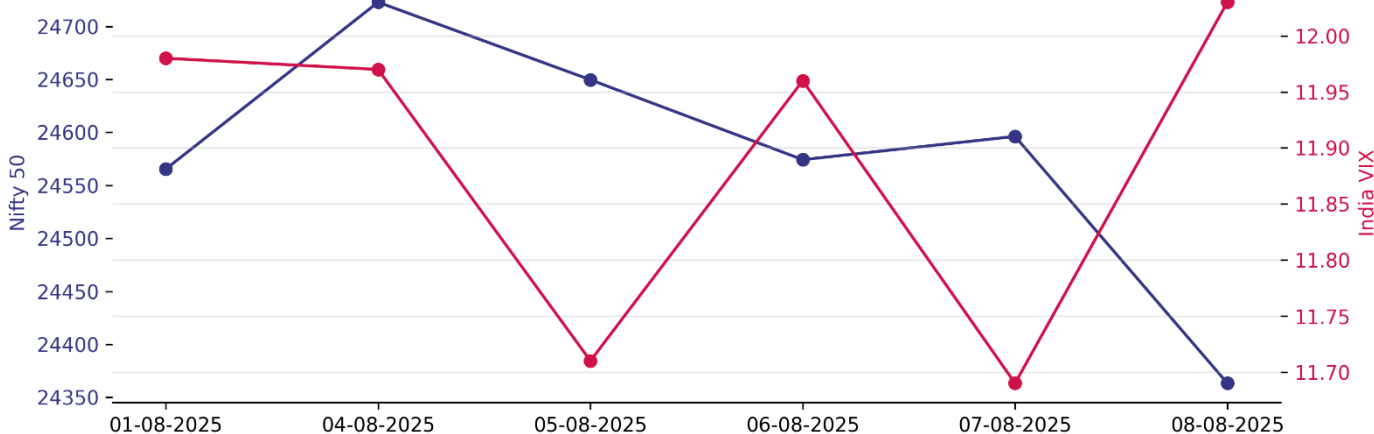
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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