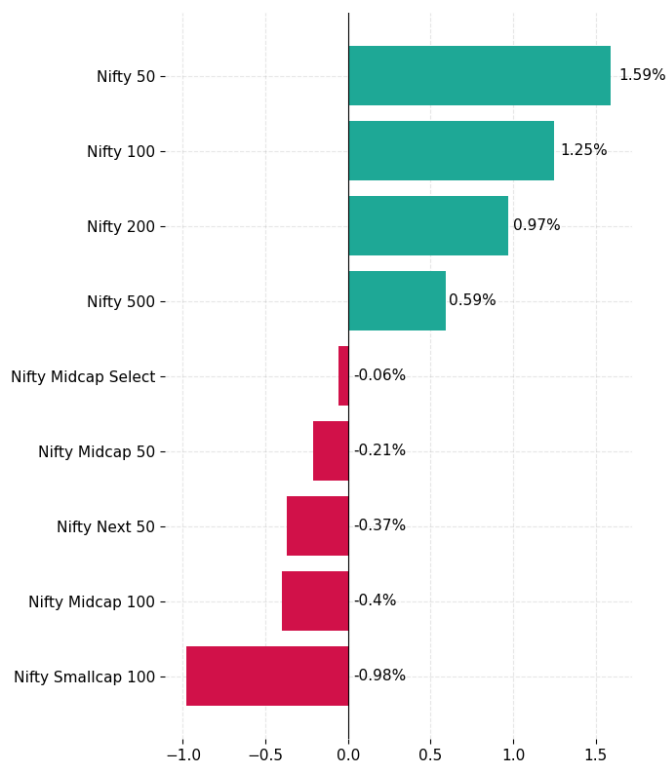


Indices Performance

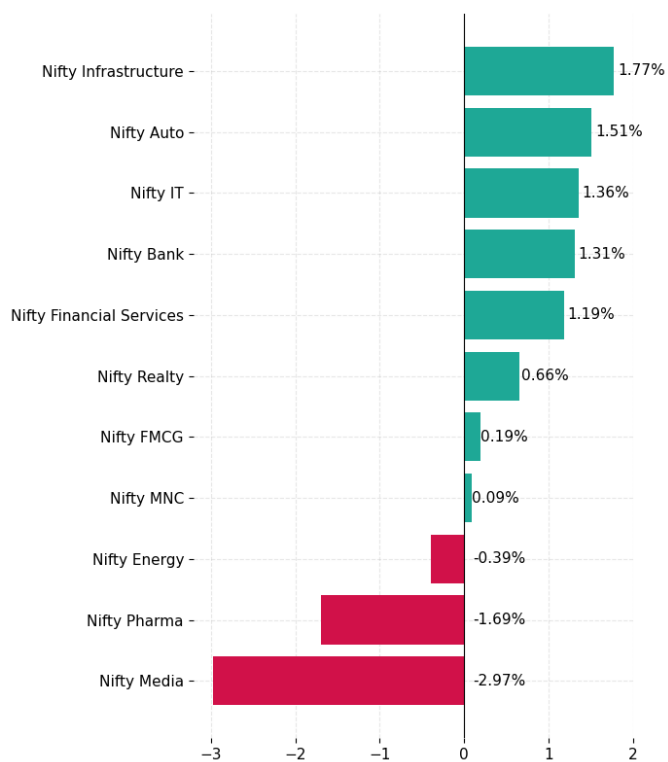
- This week, only 4 out of 9 major market indices posted a positive return.
- The Nifty 50 index was up by 1.59% this week. The Infrastructure, Auto, and IT sectors contributed significantly to the fall in the index.
- Nifty 100 registered a positive 1.25% return this week. The top gainers in the index were HYUNDAI, PFC, and SWIGGY.
- Nifty Next 50 registered a negative return of -0.37% this week. IRFC, UNITDSPR, and PNB were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -0.06% and -0.21%, respectively. The top contributors to the midcap index were BSE, DIXON, and AUROPHARMA.
- The Nifty Smallcap 100 index posted a negative return of -0.98% this week, led by the FIRSTCRY, IGIL, and IEX.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 36:14, significantly up from last week's ADR of 17:33.



Source: NSE, INVES 21 Research

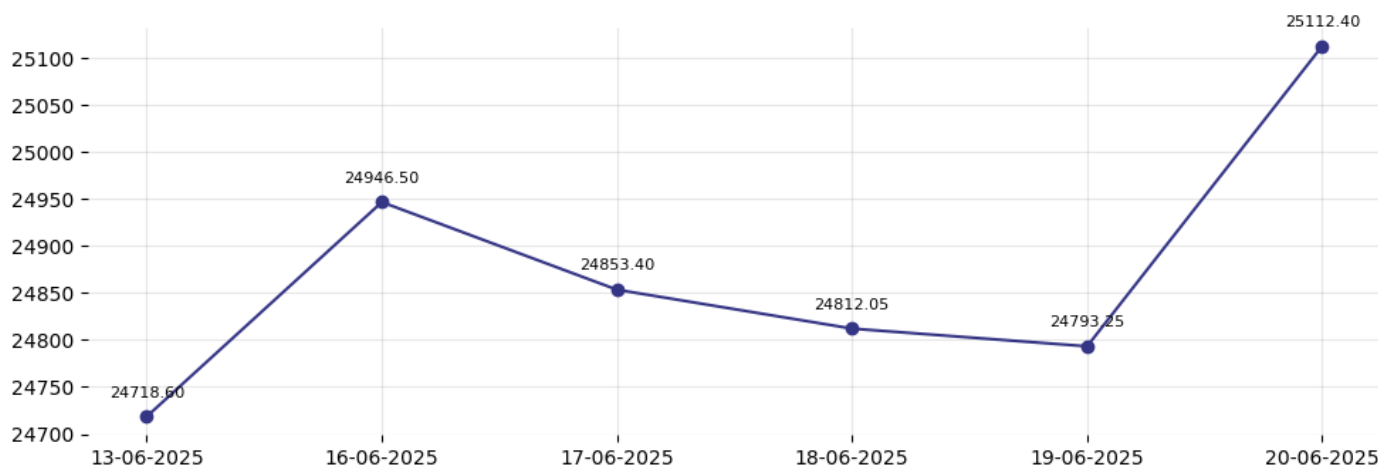
Sectoral Performance

- This week, 8 out of 11 major sectoral indices posted positive returns. Nifty Infrastructure posted the highest positive return, while Nifty Media and Pharma posted negative returns this week.
- Nifty Infrastructure registered a positive return of 1.77%. BHARTIARTL, INDHOTEL, and MAXHEALTH led to positive returns in the index.
- Nifty Auto posted a positive return of 1.51% this week. M&M, MARUTI, and EICHERMOT were major contributors to the index.
- Nifty IT registered a positive return of 1.36%, led by WIPRO, HCLTECH, and PERSISTENT.
- Nifty Bank posted a positive return of 1.31% this week. The major contributors to the index were AUBANK, INDUSINDBK, and KOTAKBANK.
- Nifty FMCG posted a positive return of 0.19% this week. TATACONSUM, MARICO, and COLPAL were the top gainers in the index.
- Nifty Media posted a negative return this week; the index was down by -2.97%. SAREGAMA, DISHTV, and PVRINOX 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 inflow of ₹8,709.60 crore this week. The week ending June 13 saw an inflow of ₹-1,246.51 crore. DII showed a net buying of ₹12,635.58 crore this week. DIIs had a net buying of ₹18,637.29 crore last week.

Participant	Amount (Cr.)
FII	8,709.60
DII	12,635.58

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's wholesale inflation eased to a 14-month low of 0.39% in May, down from 0.85% in April, driven primarily by a decline in prices of essential kitchen items such as vegetables, onions, and pulses. On a month-on-month basis, the wholesale price index (WPI) contracted to 0.06% from 0.19% in April, reflecting subdued pricing pressures. Notably, inflation in manufactured products, comprising over 60% of the WPI basket, rose by 2.04%, indicating sector-specific cost pressures. This moderation in wholesale inflation coincides with a significant easing in retail inflation as well, which dropped to a six-year low of 2.82% in May.

India's merchandise trade deficit narrowed to \$21.88 billion in May 2025, down from \$26.42 billion in April and \$22.09 billion in May 2024, aided by a decline in imports and a marginal improvement in export performance. According to data from the Ministry of Commerce and Industry, goods exports stood at \$38.73 billion, slightly lower than \$39.59 billion recorded in May last year, while imports fell to \$60.61 billion from \$61.68 billion a year ago.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,551.5	24,831.9	24,984.1	25,264.5	25,416.7

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
M&M	5.93%
TRENT	5.50%
BHARTIARTL	5.23%
EICHERMOT	3.87%
HDFCLIFE	3.75%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TATAMOTORS	-5.03%
ADANI PORTS	-3.96%
BAJFINANCE	-3.01%
DRREDDY	-2.73%
ADANI ENT	-2.37%

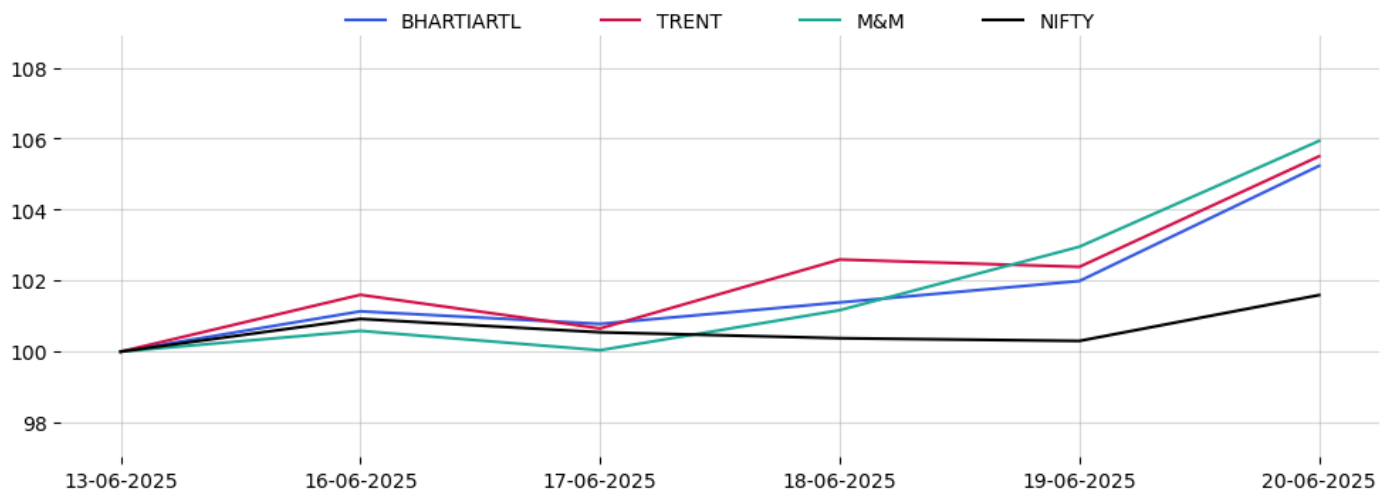
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
BEL	4,19,41,832
ONGC	2,31,56,028
TATASTEEL	2,03,59,592

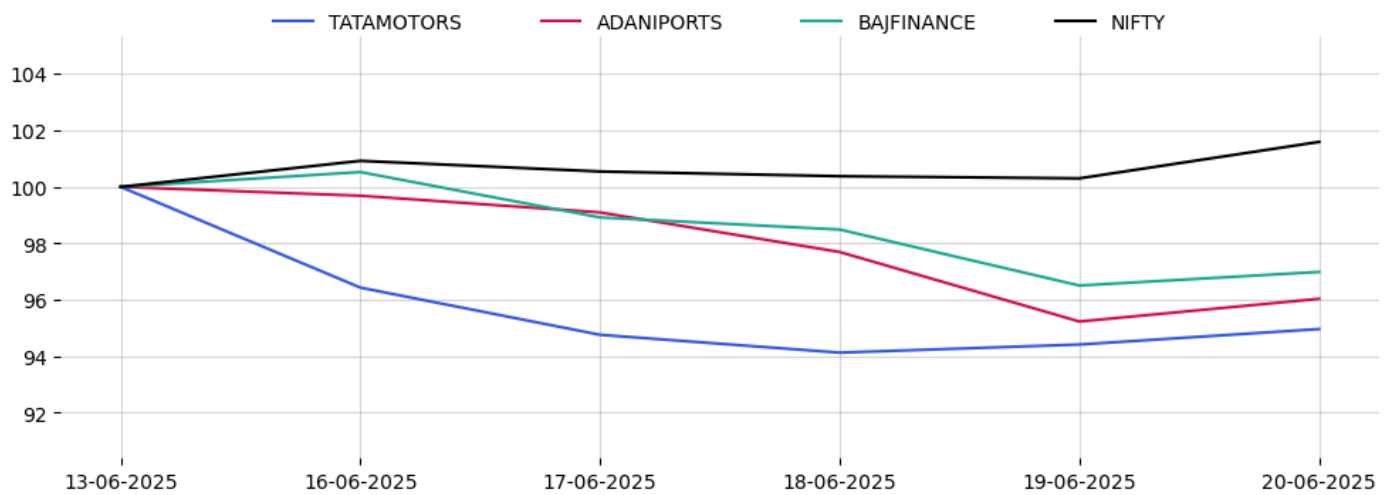
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



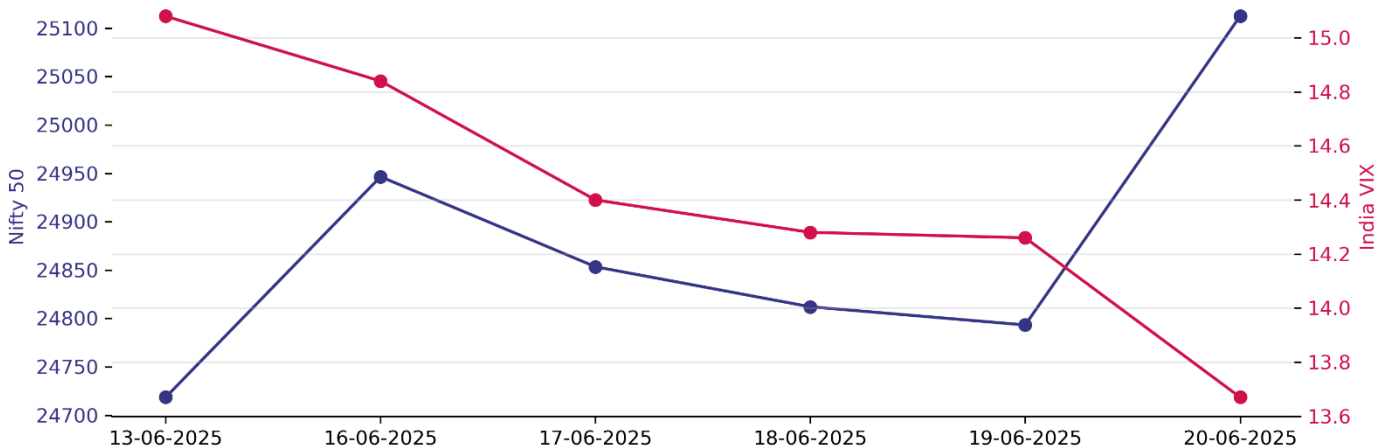
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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