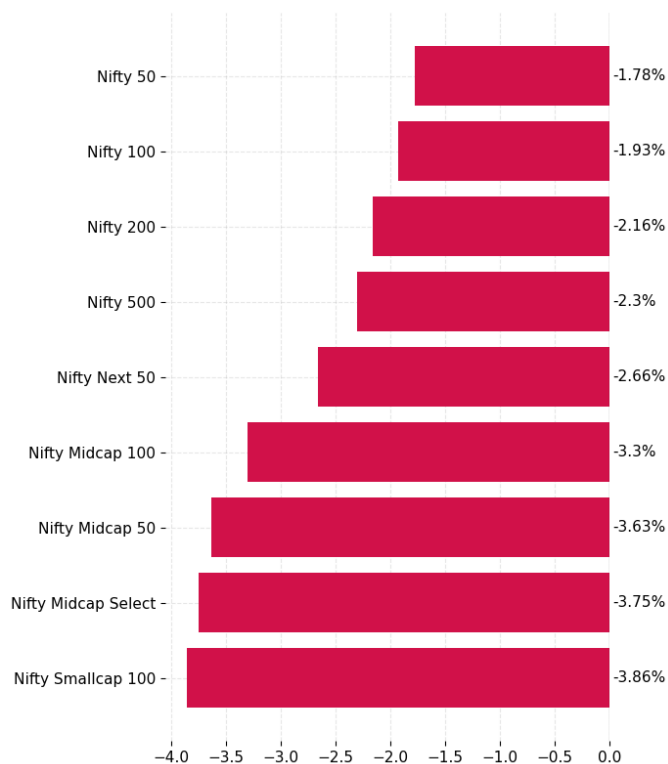


## Indices Performance

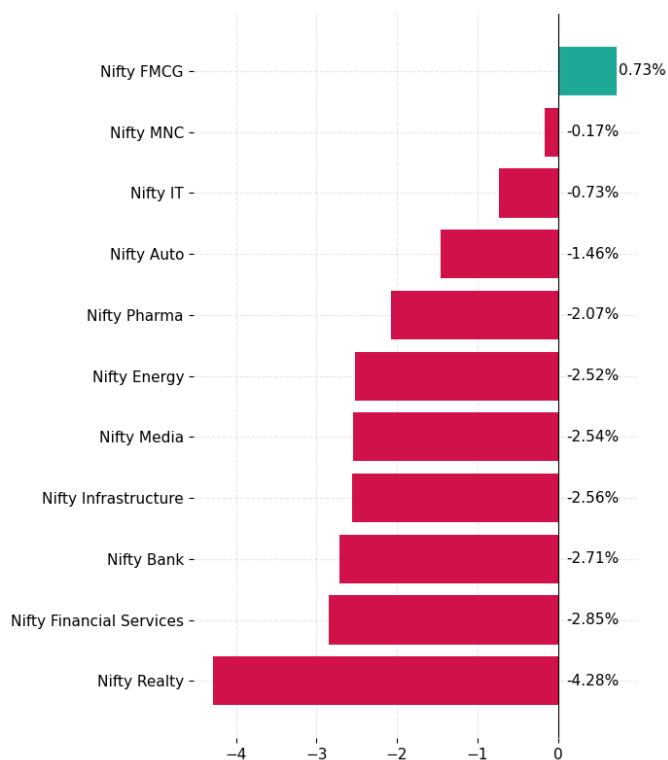
- This week, all of the major market indices posted a negative return, which comes after two consecutive weeks of positive returns.
- The Nifty 50 index was down by -1.78% this week. The Realty, Financial Services, and Banking sectors contributed significantly to the rise in the index.
- Nifty 100 registered a negative -1.93% return this week. The top losers in the index were PFC, RECLTD, and INDIGO.
- Nifty Next 50 registered a negative return of -2.66% this week. BAJAJHLDNG, PFC, and INDIGO were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -3.75% and -3.63%, respectively. The top contributors to the midcap index were BSE, IDEA, and POLICYBZR.
- The Nifty Smallcap 100 index posted a negative return of -3.86% this week, led by ANGELONE, MCX, and GRSE.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 13:37, significantly down from the last week's ADR of 35:15.



Source: NSE, INVES 21 Research

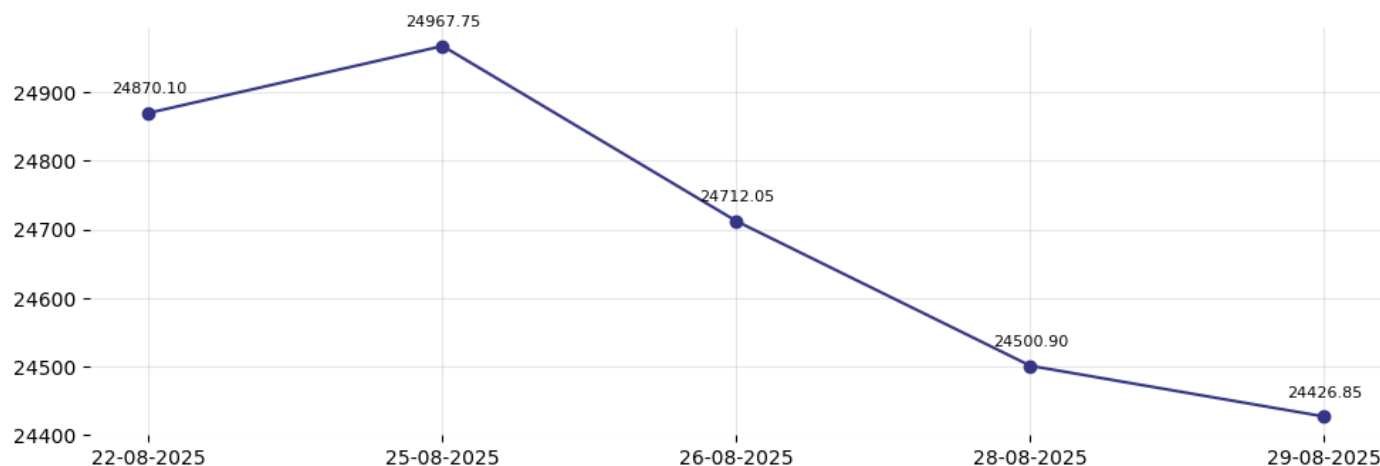
## Sectoral Performance

- This week, all major sectoral indices posted a negative return except for the Nifty FMCG.
- Nifty FMCG registered a positive return of 0.73%. COLPAL, BRITANNIA, and ITC led to positive returns in the index.
- Nifty IT posted a negative return of -0.73% this week. OFSS, LTIM, and TECHM were major contributors to the index.
- Nifty Auto registered a negative return of -1.46%, led by M&M, BALKRSIND, and MRF.
- Nifty Energy posted a negative return of -2.52% this week. The major contributors to the index were CESC, OIL, and ADANIGREEN.
- Nifty Bank posted a negative return of -2.71% this week. AUBANK, CANBK, and HDFCBANK were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -4.28%. ANATRAJ, LODHA, and PRESTIGE 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 ₹-21,151.90 crore this week. The week ending Aug 22 saw an outflow of ₹-1,559.51 crore. DII showed a net buying of ₹28,645.04 crore this week. DIIs had a net buying of ₹10,388.23 crore last week.

Participant	Amount (Cr.)
FII	-21,151.90
DII	28,645.04

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's GDP grew by 7.8% in Q1 FY26, the fastest pace in five quarters, surpassing economists' expectations of 6.7% and up from 7.4% in the previous quarter, according to government data released on Friday. The economy showed unexpected resilience despite rising global headwinds, including the recent U.S. decision to double tariffs on Indian imports to as high as 50% over continued Russian oil purchases, a move that threatens to impact exports of textiles, leather goods, and chemicals in the coming quarters.

India's industrial output rose 3.5% in July, hitting a four-month high and up from 1.5% in June, driven by a 5.4% expansion in manufacturing, according to MoSPI data. While electricity generation grew marginally by 0.6%, mining contracted sharply by 7.2%. Within manufacturing, 14 of 23 industry groups recorded positive growth, led by electrical equipment (15.9%), basic metals (12.7%), and non-metallic mineral products (9.5%), reflecting robust factory activity despite sectoral divergences.

## Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,000.9	24,213.9	24,617.7	24,830.7	25,234.6

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
BRITANNIA	5.02%
MARUTI	3.08%
EICHERMOT	3.01%
ITC	2.87%
HEROMOTOCO	1.80%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
M&M	-5.98%
SHRIRAMFIN	-5.78%
APOLLOHOSP	-3.94%
RELIANCE	-3.69%
ADANIENIT	-3.45%

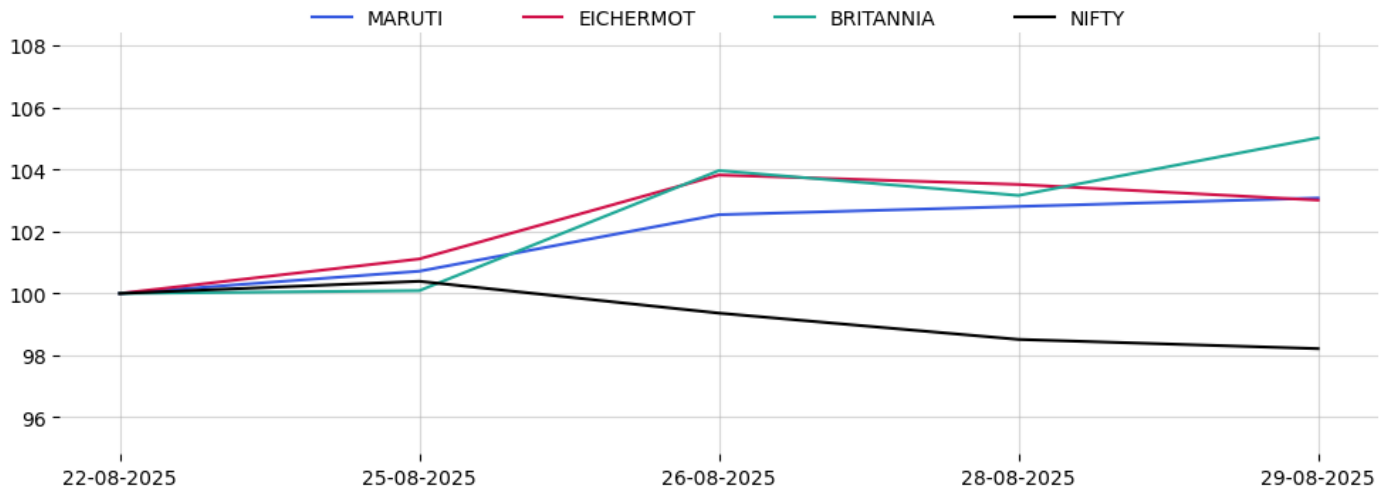
Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
HDFCBANK	1,57,55,224
TATASTEEL	1,52,17,227
ITC	1,24,95,072

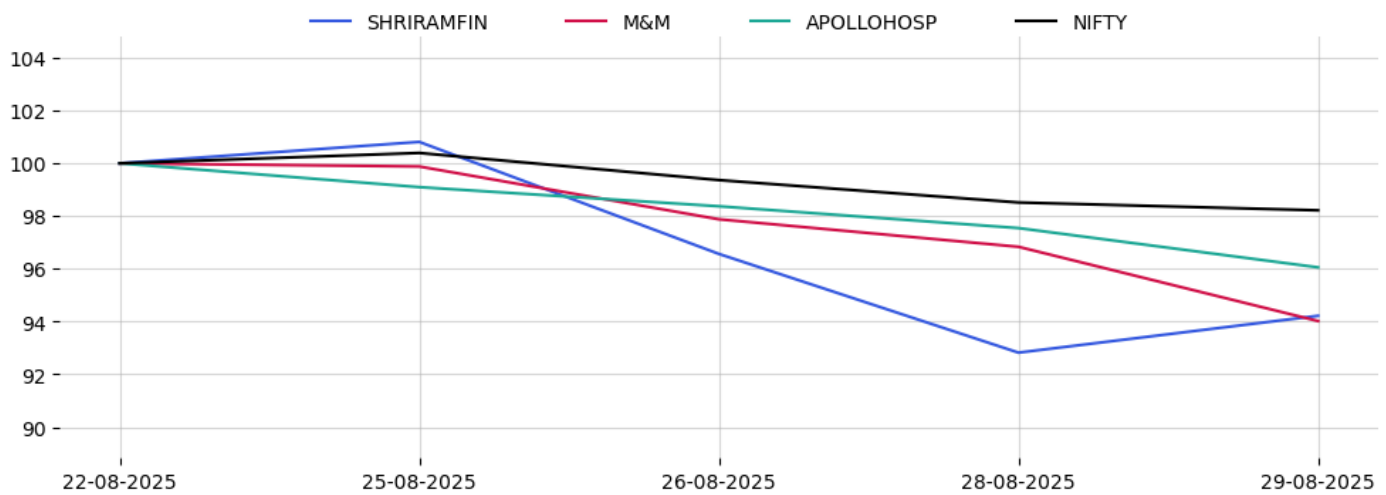
Source: NSE, INVES 21 Research

## Top 3 Outperformers of the week



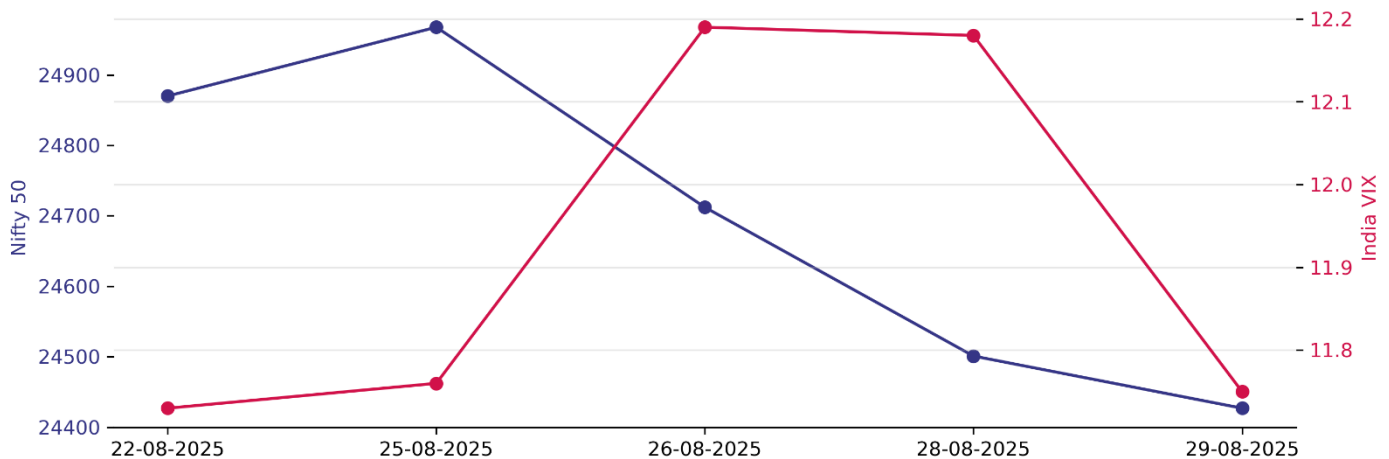
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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