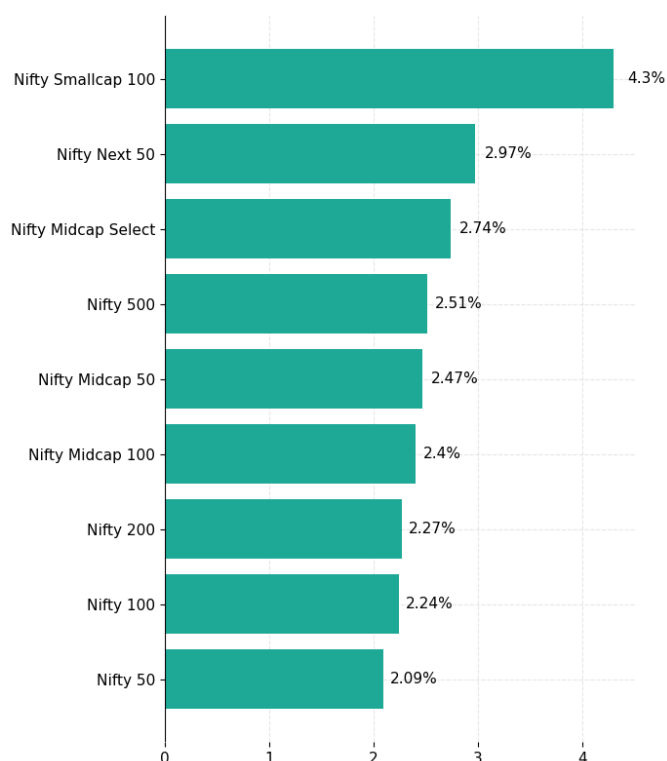


## Indices Performance

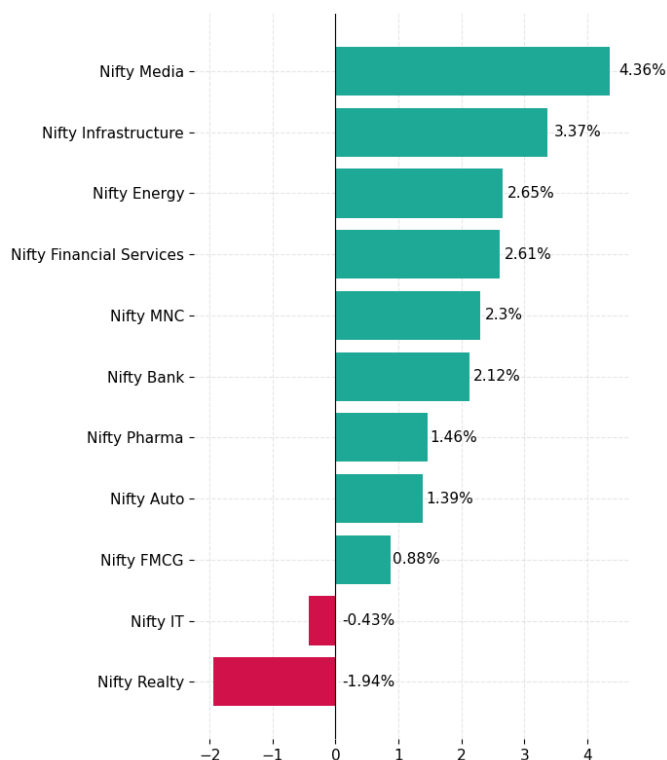
- This week, all major market indices posted positive returns.
- The Nifty 50 index was up by 2.09% this week. The Media, Infrastructure, and Energy sectors contributed significantly to the rise in the index.
- Nifty 100 registered a positive 2.24% return this week. The top gainers in the index were ADANIPOWER, JIOFIN, and INDIGO.
- Nifty Next 50 registered a positive return of 2.97% this week. ENRIN, PFC, and ADANIGREEN were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 2.74% and 2.47%, respectively. The top contributors to the midcap index were IDEA, HINDPETRO, and POLYCAB.
- The Nifty Smallcap 100 index posted a positive return of 4.30% this week, led by the HINDCOPPER, KFINTECH, and MCX.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 42:8, significantly up from last week's ADR of 36:14.



Source: NSE, INVES 21 Research

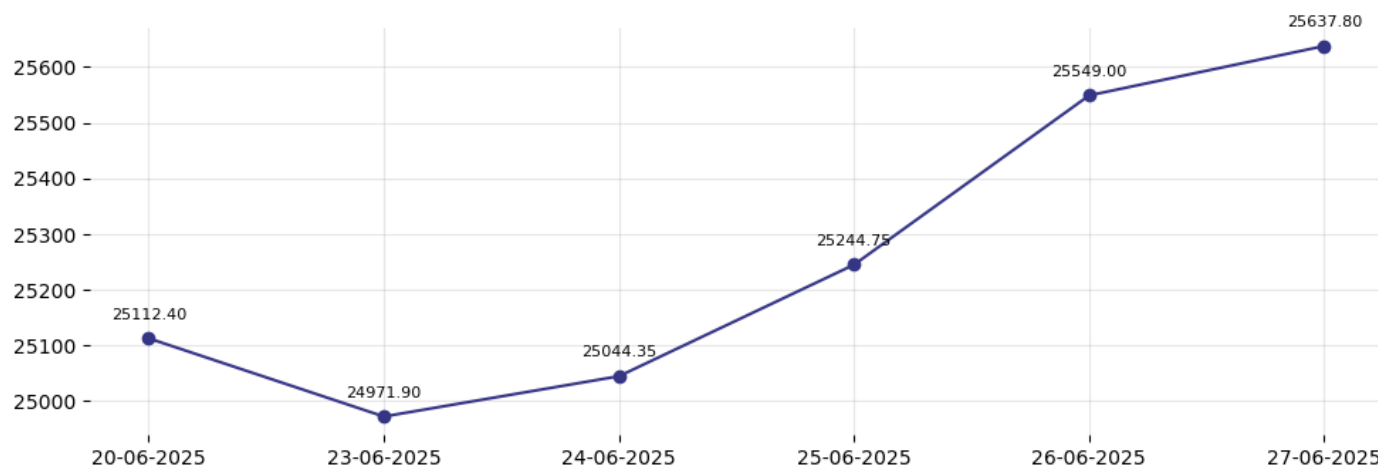
## Sectoral Performance

- This week, 9 out of 11 major sectoral indices posted positive returns. Nifty Media posted the highest positive return, while Nifty IT and Realty posted negative returns this week.
- Nifty Media registered a positive return of 4.36%. NETWORK18, HATHWAY, and ZEEL led to positive returns in the index.
- Nifty Infrastructure posted a positive return of 3.37% this week. HINDPETRO, INDIGO, and BHARTIARTL were major contributors to the index.
- Nifty Bank registered a positive return of 2.12%, led by AUBANK, HDFCBANK, and BANKBARODA.
- Nifty Pharma posted a positive return of 1.46% this week. The major contributors to the index were ABBOTINDIA, AUROPHARMA, and TORNTPHARM.
- Nifty IT posted a negative return of -0.43% this week. MPHASIS, COFORGE, and TCS were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -1.94%. SOBHA, PRESTIGE, and BRIGADE 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 ₹4,423.37 crore this week. The week ending June 20 saw an inflow of ₹8,709.60 crore. DII showed a net buying of ₹12,390.17 crore this week. DIIs had a net buying of ₹12,635.58 crore last week.

Participant	Amount (Cr.)
FII	4,423.37
DII	12,390.17

Data: Cash Market; Source: NSE, NSDL

## Economic Events

India's private sector activity surged to a 14-month high in June, as reflected in the HSBC Flash PMI data, with the composite output index rising to 61.0 from 59.3 in May, signaling robust expansion well above the long-run average. The report highlighted that manufacturing led the upturn, supported by a notable acceleration in services, marking two- and ten-month highs respectively. Strong demand conditions, efficiency improvements, and increased tech investment were cited as key drivers of output growth. Export orders recorded their strongest upturn since comparable data began, while hiring remained resilient and price pressures softened.

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
24,542.9	25,090.4	25,372.3	25,919.7	26,201.6

Source: INVES 21 Research

## Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
ADANIENT	8.08%
HINDALCO	7.43%
ADANI PORTS	6.74%
ULTRACEMCO	6.59%
TATASTEEL	6.24%

Source: NSE, INVES 21 Research

## Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
ONGC	-3.60%
DRREDDY	-1.83%
TECHM	-1.28%
MARUTI	-1.16%
HCLTECH	-0.95%

Source: NSE, INVES 21 Research

## Volume Busters

Stocks	Volumes
BEL	4,92,54,321
NTPC	3,47,07,856
TATASTEEL	2,72,20,166

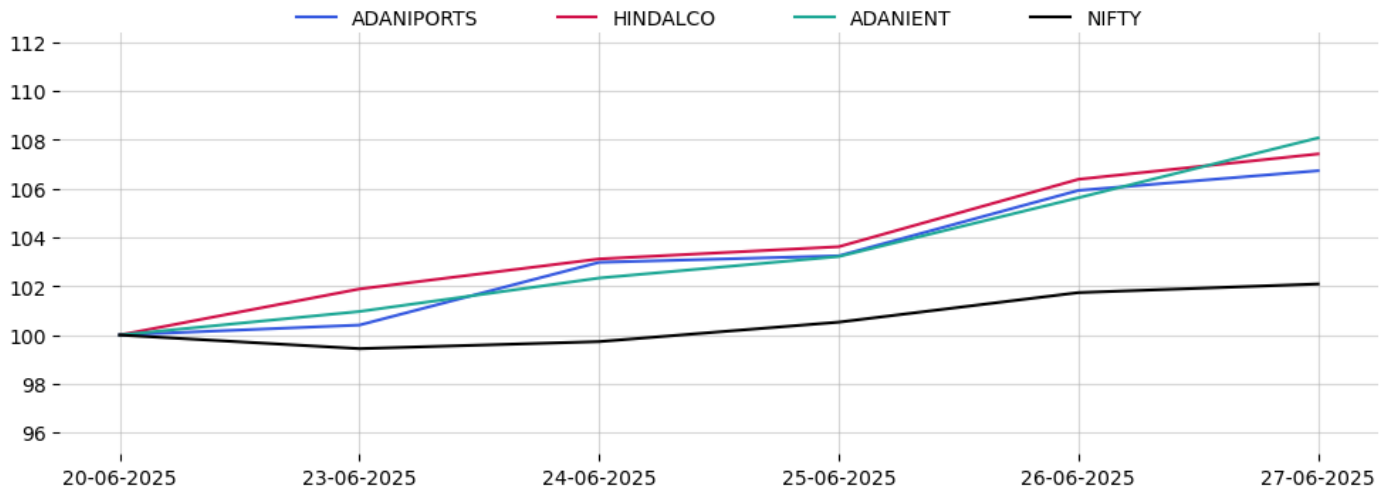
Source: NSE, INVES 21 Research

# Weekly Market Review

29 June 2025

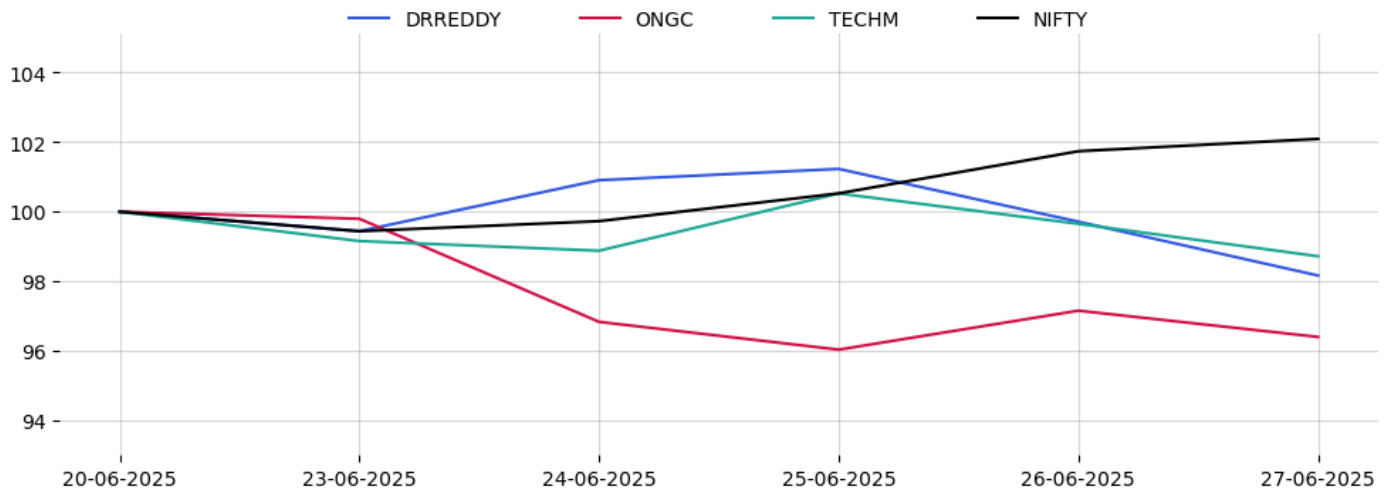
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## Top 3 Outperformers of the week



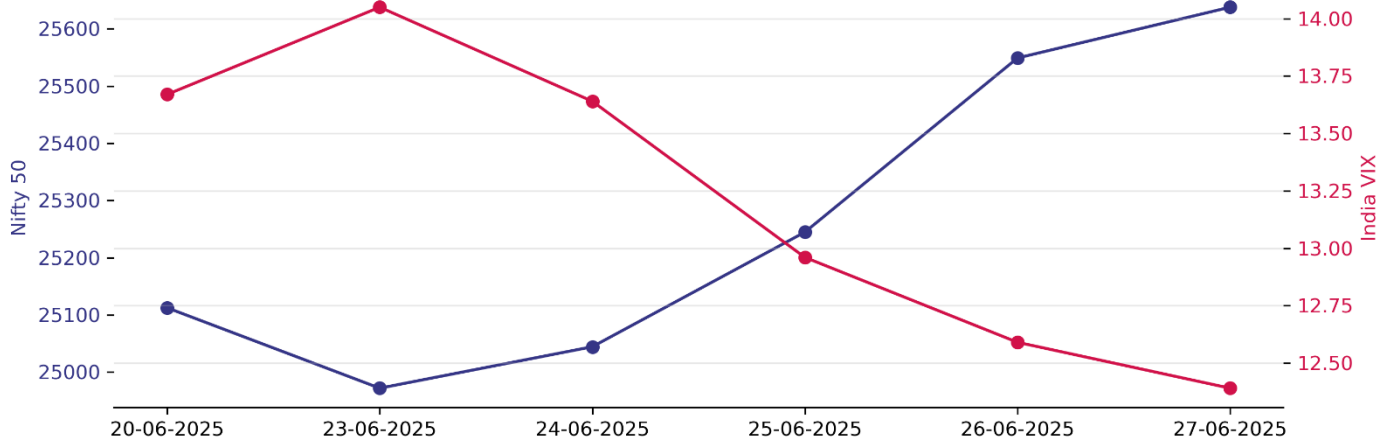
Data: Rebased; Source: NSE, INVES 21 Research

## Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

## India VIX



Source: NSE, INVES 21 Research

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