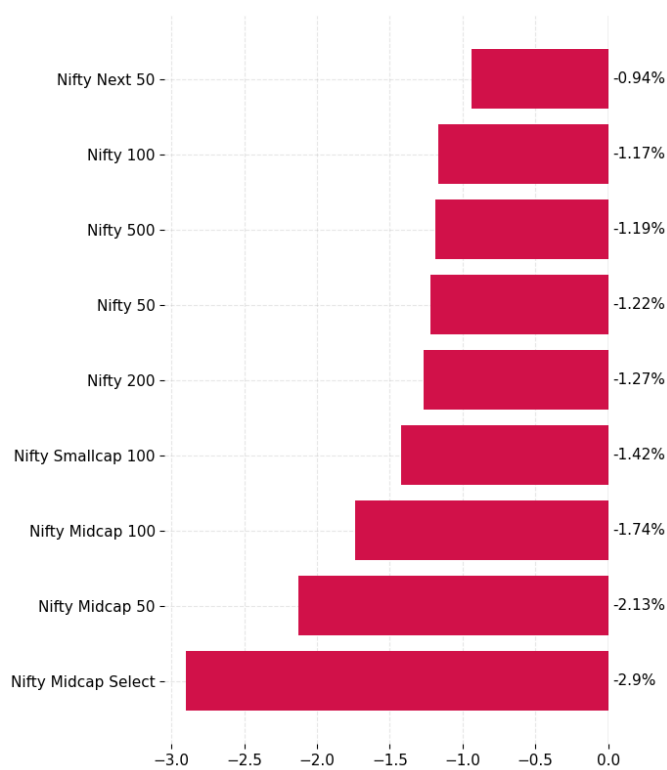


Indices Performance

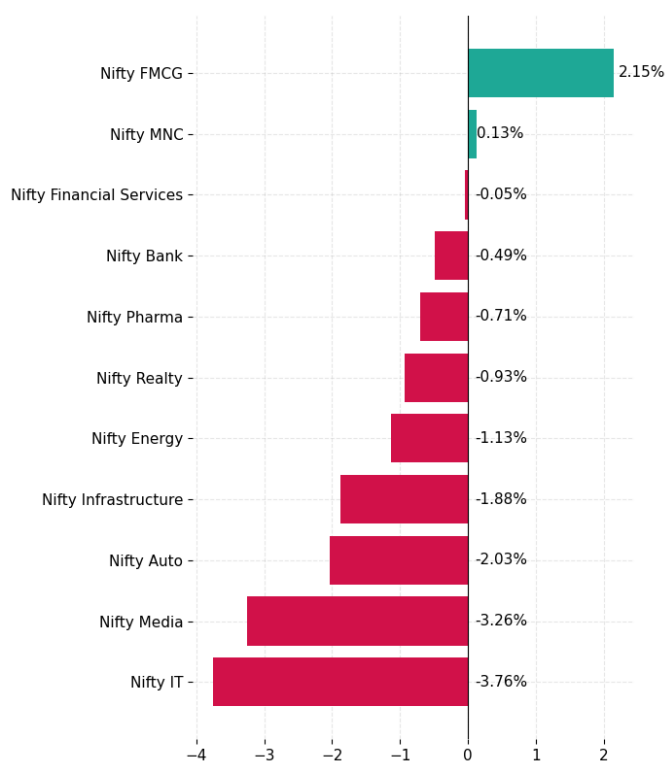
- This week, all of the major market indices posted a negative return.
- The Nifty 50 index was down by -1.22% this week. The IT, Media, and Auto sectors contributed significantly to the drop in the index.
- Nifty 100 registered a negative -1.17% return this week. The top losers in the index were TRENT, TITAN, and NAUKRI.
- Nifty Next 50 registered a negative return of -0.94% this week. DMART, GAIL, and ABB were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a negative return this week, with -2.90% and -2.13%, respectively. The top contributors to the midcap index were BSE, BHARATFORG, and PERSISTENT.
- The Nifty Smallcap 100 index posted a negative return of -1.42% this week, led by the NUVAMA, MCX, and ABREL.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 13:37, significantly down from last week's ADR of 22:28.



Source: NSE, INVES 21 Research

Sectoral Performance

- This week, only 2 out of 11 major market sectoral indices posted a positive return. Nifty FMCG, and Nifty MNC posted a positive return.
- Nifty FMCG registered a positive return of 2.15%. UNITDSPR, COLPAL, and TATACONSUM led to positive returns in the index.
- Nifty MNC posted a positive return of 0.13% this week. POWERINDIA, HYUNDAI, and SIEMENS were major contributors to the index.
- Nifty Bank registered a negative return of -0.49%, led by FEDERALBNK, IDFCFIRSTB, and CANBK.
- Nifty Pharma posted a negative return of -0.71% this week. The major contributors to the index were JBCHEMPHARM, GRANUELS, and DRREDDY.
- Nifty Realty posted a negative return of -0.93% this week. PHOENIXLTD, GODREJPROP, and DLF were the top losers in the index.
- Nifty IT posted a negative return this week; the index was down by -3.76%. PERSISTENT, OFSS, and HCLTECH were the top losers in the index.



Source: NSE, INVES 21 Research

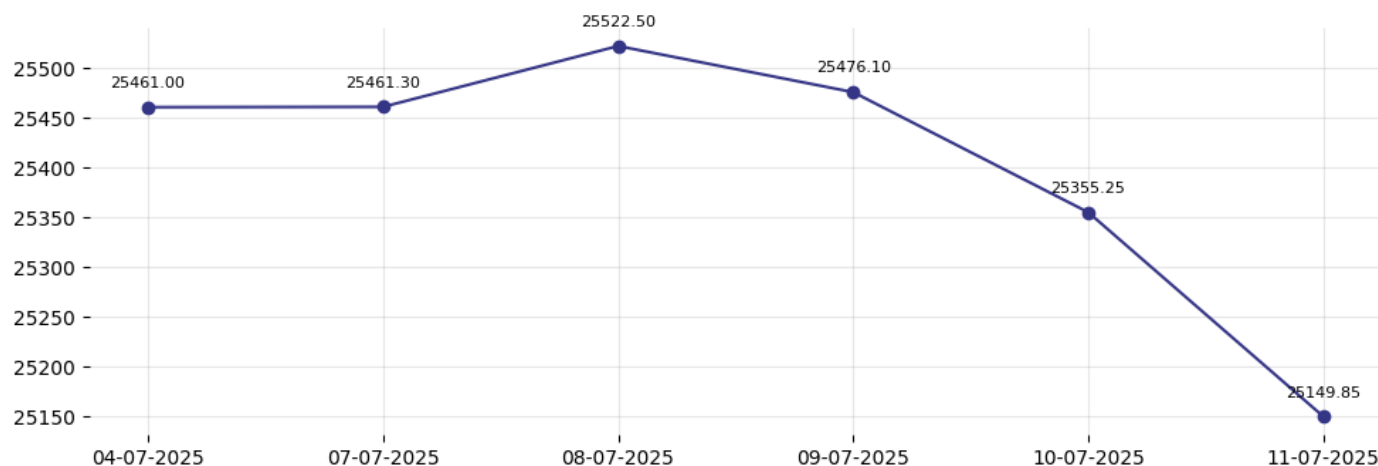
Weekly Market Review

12 July 2025

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Nifty 50 Weekly Trend



Source: NSE, INVES 21 Research

FII and DII Activity

FII showed an outflow of ₹-4,511.12 crore this week. The week ending July 4 saw an inflow of ₹-6,604.56 crore. DII showed a net buying of ₹8,291.00 crore this week. DIIs had a net buying of ₹7,609.42 crore last week.

Participant	Amount (Cr.)
FII	-4,511.12
DII	8,291.00

Data: Cash Market; Source: NSE, NSDL

Economic Events

In June, equity mutual fund inflows surged by 24% month-on-month to ₹23,587 crore, up from ₹19,013 crore in May, according to AMFI data. This strong momentum contributed to an overall mutual fund net inflow of ₹49,301 crore, marking a 67% increase from the previous month. Systematic Investment Plans (SIPs) also hit record highs, with ₹27,268.79 crore in contributions and 61.91 lakh new SIP registrations, taking the total number of active SIP accounts to 8.64 crore and the SIP AUM to ₹15.30 lakh crore. Notably, Gold ETFs saw a sixfold jump in inflows to ₹2,080.9 crore, while other ETFs witnessed a steep 79% decline to ₹844.4 crore.

India's manufacturing activity witnessed a sharp rebound in June 2025, with the HSBC India Manufacturing PMI rising to a 14-month high of 58.4, up from 57.6 in May, signaling a strong expansion in the sector after a brief slowdown. The surge was primarily driven by a sharp increase in export orders, which recorded their third-highest growth rate since the survey began in 2005.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,856.1	25,003.0	25,275.9	25,422.7	25,695.6

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
HINDUNILVR	7.71%
KOTAKBANK	4.26%
NTPC	2.15%
SBILIFE	1.97%
POWERGRID	1.55%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TITAN	-8.55%
HCLTECH	-5.08%
APOLLOHOSP	-4.82%
BHARTIARTL	-4.72%
TCS	-4.50%

Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	1,99,83,731
BEL	1,71,44,642
NTPC	1,00,31,030

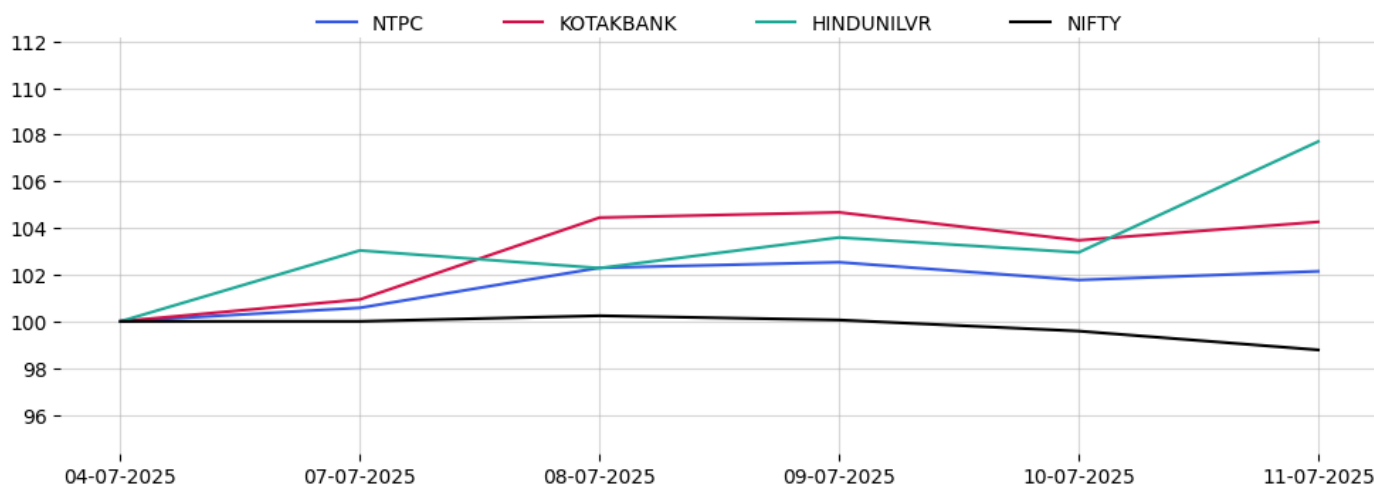
Source: NSE, INVES 21 Research

Weekly Market Review

12 July 2025

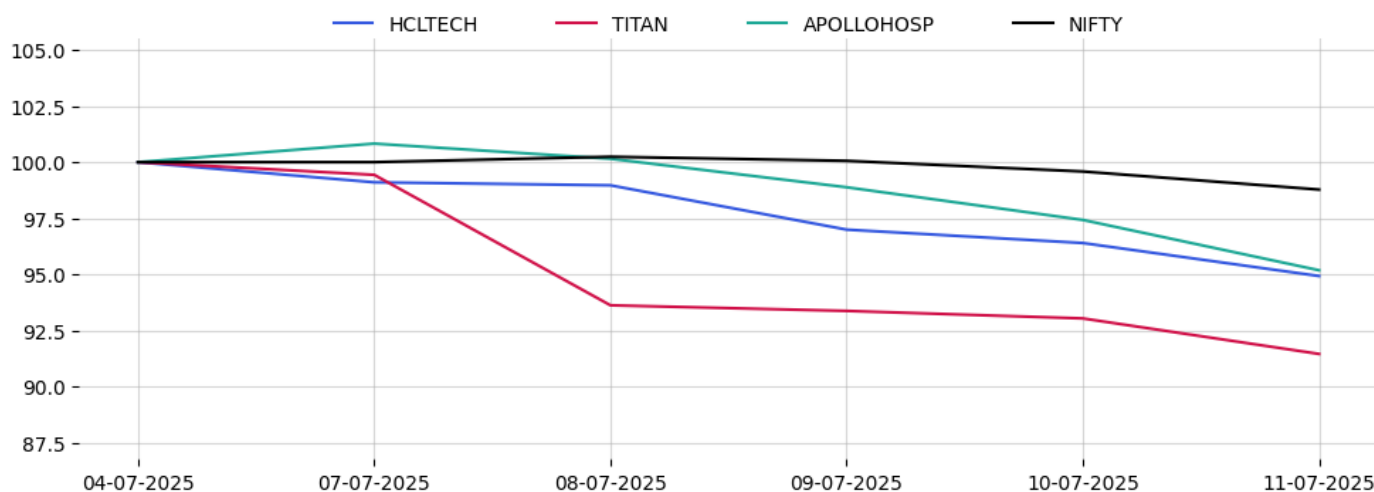
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Top 3 Outperformers of the week



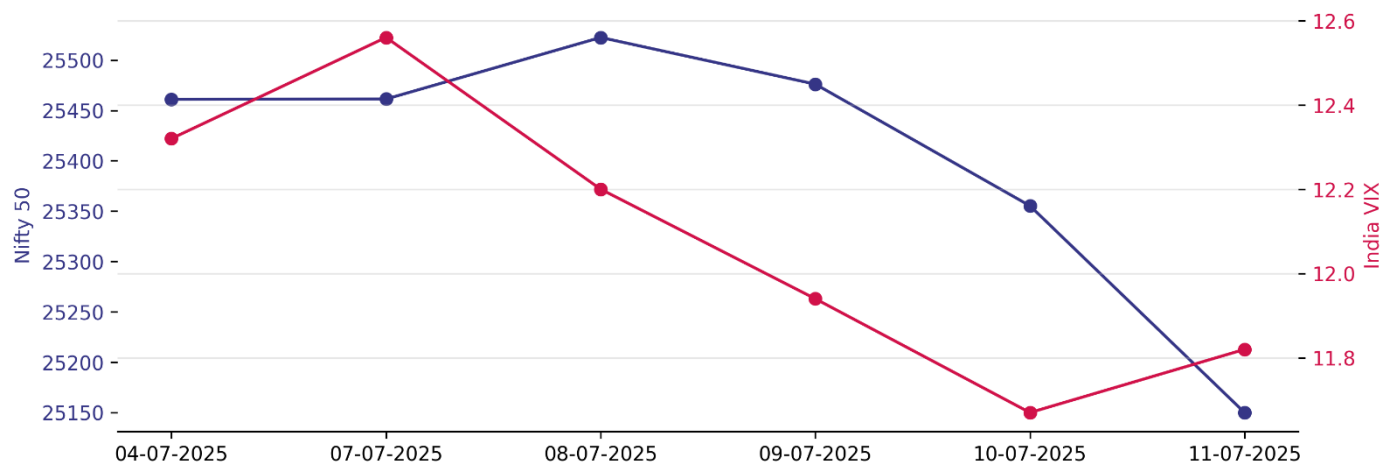
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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