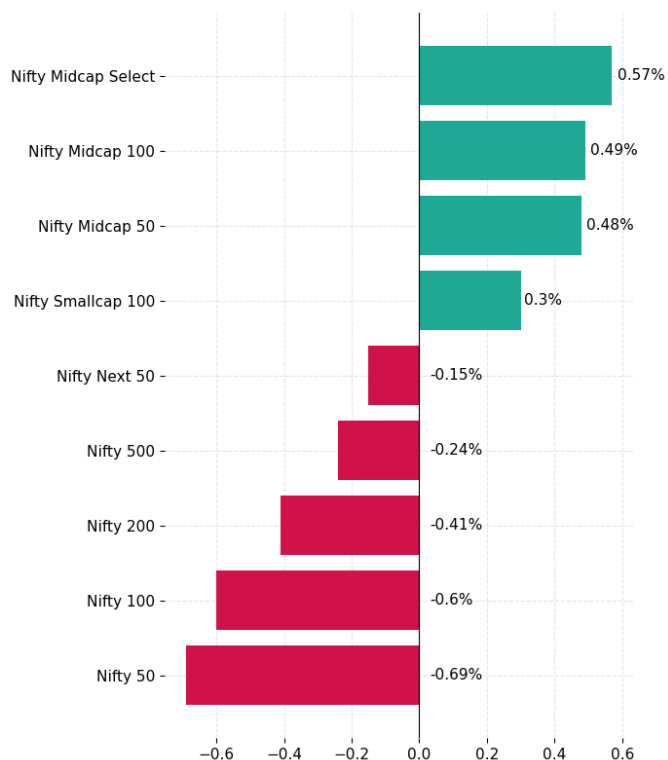


Indices Performance

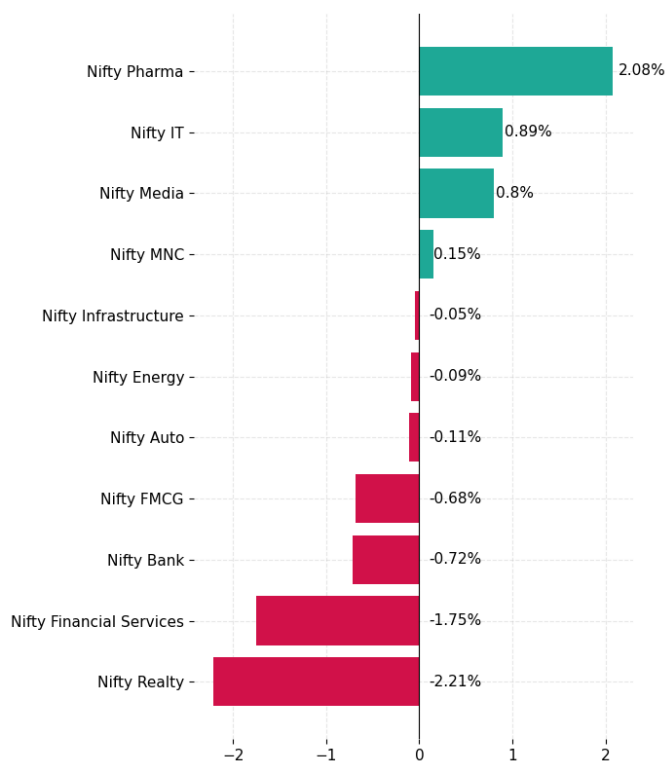
- This week, 4 out of 9 major market indices posted a positive return.
- The Nifty 50 index was down by -0.69% this week. The Realty, Financial Services, and Auto sectors contributed significantly to the drop in the index.
- Nifty 100 registered a negative 0.60% return this week. The top losers in the index were LODHA, TRENT, and CHOLAFIN.
- Nifty Next 50 registered a negative return of -0.15% this week. UNITDSPR, SWIGGY, and ADANIGREEN were the top losers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 0.57% and 0.48%, respectively. The top contributors to the midcap index were HINDPETRO, MPHASIS, and MAXHEALTH.
- The Nifty Smallcap 100 index posted a positive return of 0.30% this week, led by the LAURUSLABS, NATCOPHARM, and WELSPUNLIV.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 22:28, significantly down from last week's ADR of 42:8.



Source: NSE, INVES 21 Research

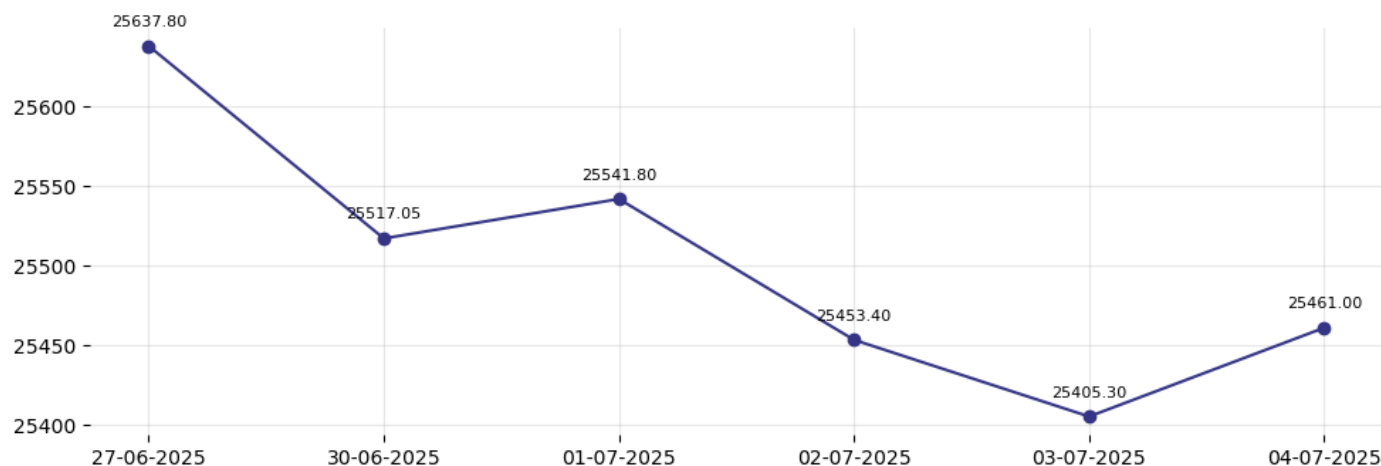
Sectoral Performance

- This week, only 4 out of 11 major market sectoral indices posted a positive return. Nifty Pharma posted the highest positive return, whereas Nifty Realty posted the most negative return.
- Nifty Pharma registered a positive return of 2.08%. LAURUSLABS, NATCOPHARMA, and ABBOTINDIA led to positive returns in the index.
- Nifty IT posted a positive return of 0.89% this week. MPHASIS, INFY, and WIPRO were major contributors to the index.
- Nifty Auto registered a negative return of -0.11%, led by BOSCHLTD, BALKRISIND, and MOTHERSON.
- Nifty FMCG posted a negative return of -0.68% this week. The major contributors to the index were TATACONSUM, UNITDSPR, and NESTLEIND.
- Nifty Bank posted a negative return of -0.72% this week. KOTAKBANK, AXISBANK, and BANKBARODA were the top losers in the index.
- Nifty Realty posted a negative return this week; the index was down by -2.21%. LODHA, PHOENIXLTD, 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 outflow of ₹-6,604.56 crore this week. The week ending June 27 saw an inflow of ₹4,423.37 crore. DII showed a net buying of ₹7,609.42 crore this week. DIIs had a net buying of ₹12,390.17 crore last week.

Participant	Amount (Cr.)
FII	-6,604.56
DII	7,609.42

Data: Cash Market; Source: NSE, NSDL

Economic Events

India's gross Goods and Services Tax (GST) collections rose by 6.2% year-on-year to ₹1.85 lakh crore in June 2025, marking the slowest growth in four years and representing an 8.2% decline from May 2025 levels. This was also the lowest monthly collection in four months. After accounting for refunds, net GST revenue stood at ₹1.59 lakh crore, reflecting a modest 3.3% increase over June 2024. For the first quarter of FY2025-26 (April-June 2025), gross GST collections aggregated to ₹2.07 lakh crore, indicating a deceleration in revenue momentum amid a high base and potential moderation in consumption trends.

India's services sector activity surged to a 10-month high in June 2025, supported by robust domestic and international demand, according to the HSBC India Services PMI compiled by S&P Global. The seasonally adjusted Services PMI rose to 60.4 in June, up from 58.8 in May, marking the fastest pace of expansion since August 2024 and remaining well above the 50-mark that separates growth from contraction.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
25,149.6	25,305.3	25,487.3	25,643.0	25,825.0

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
BPCL	3.96%
APOLLOHOSP	3.35%
BEL	3.15%
ASIANPAINT	2.78%
ULTRACEMCO	2.40%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
TRENT	-9.36%
AXISBANK	-3.80%
KOTAKBANK	-3.54%
SHRIRAMFIN	-3.40%
TATACONSUM	-3.08%

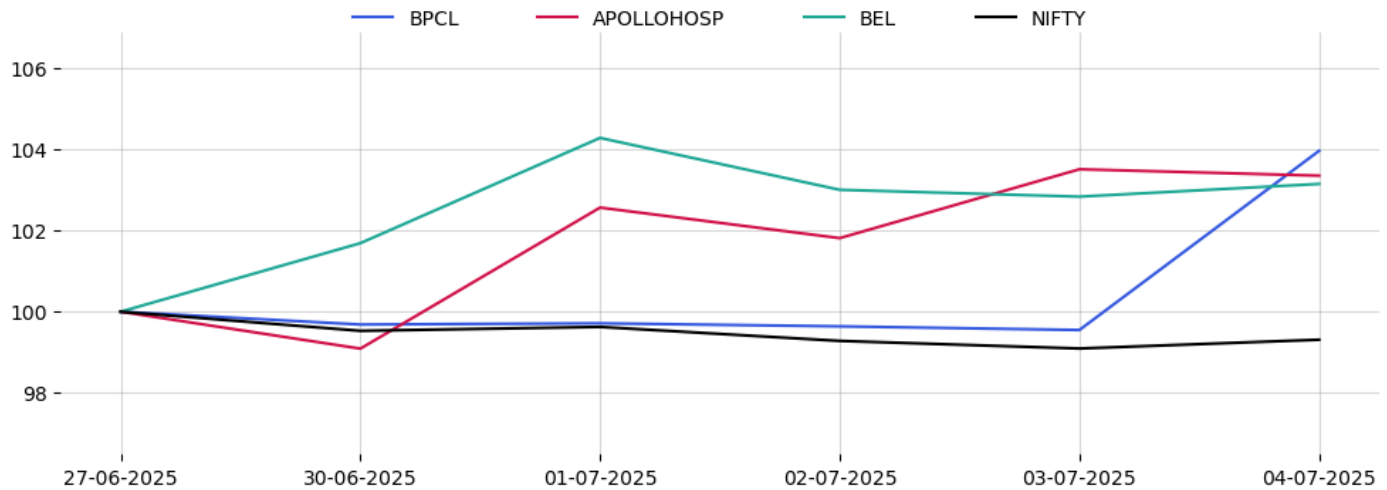
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
TATASTEEL	3,54,12,151
BEL	2,50,16,662
NTPC	1,74,36,416

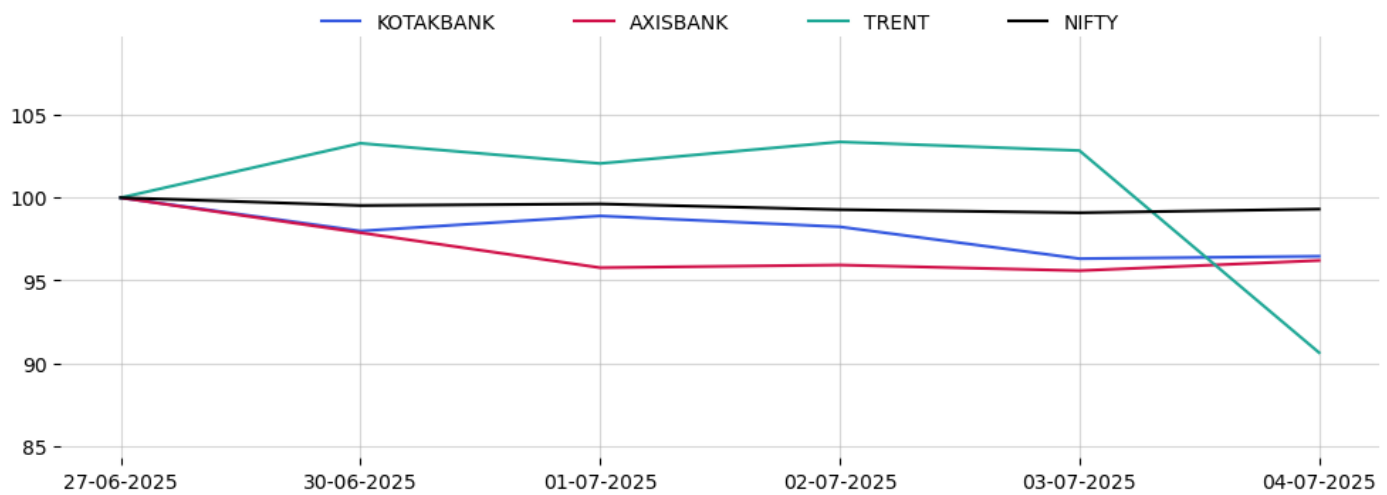
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



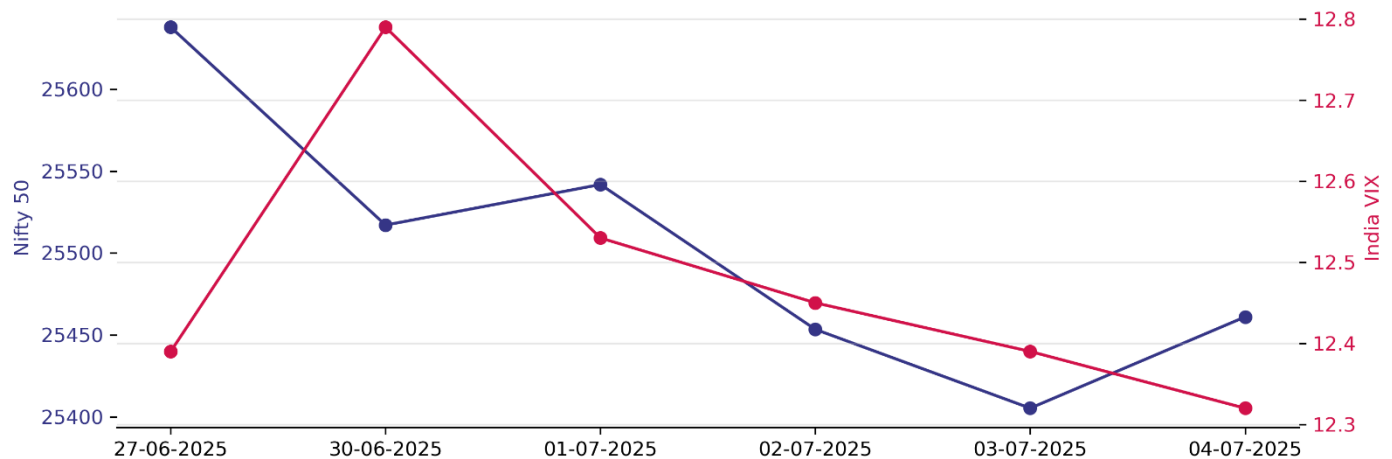
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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