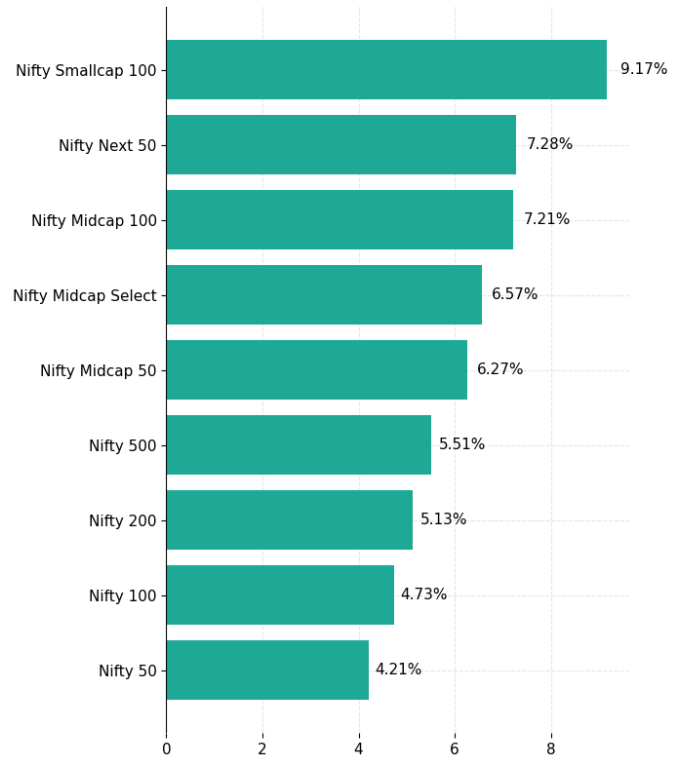


Indices Performance

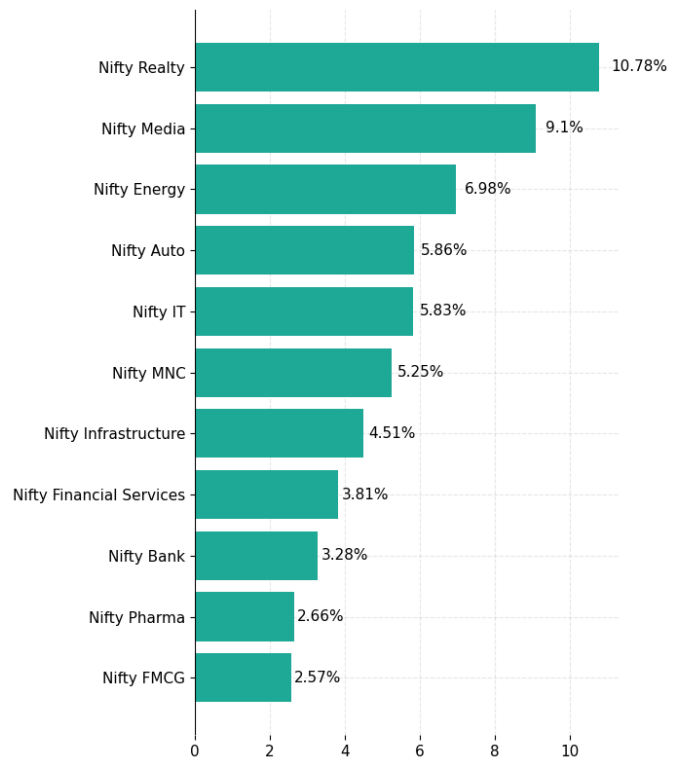
- This week, all major market indices posted a positive return.
- The Nifty 50 index was up by 4.21% this week. The Realty, Media, and Energy sectors contributed significantly to the rise in the index.
- Nifty 100 registered a positive 4.73% return this week. The top gainers in the index were BEL, BAJAJHLDNG, and LODHA.
- Nifty Next 50 registered a positive return of 7.28% this week. ADANIGREEN, CGPOWER, and HAL were the top gainers in the index.
- Nifty Midcap Select and Nifty Midcap 50 posted a positive return this week, with 6.57% and 6.27%, respectively. The top contributors to the midcap index were BSE, COFORGE, and IDEA.
- The Nifty Smallcap 100 index posted a positive return of 9.17% this week, led by the RITES, DATAPATNS, and TITAGRH.
- The ADR (Advance to Decline Ratio) for Nifty 50 this week was 47:3, significantly up from last week's ADR of 27:23.



Source: NSE, INVES 21 Research

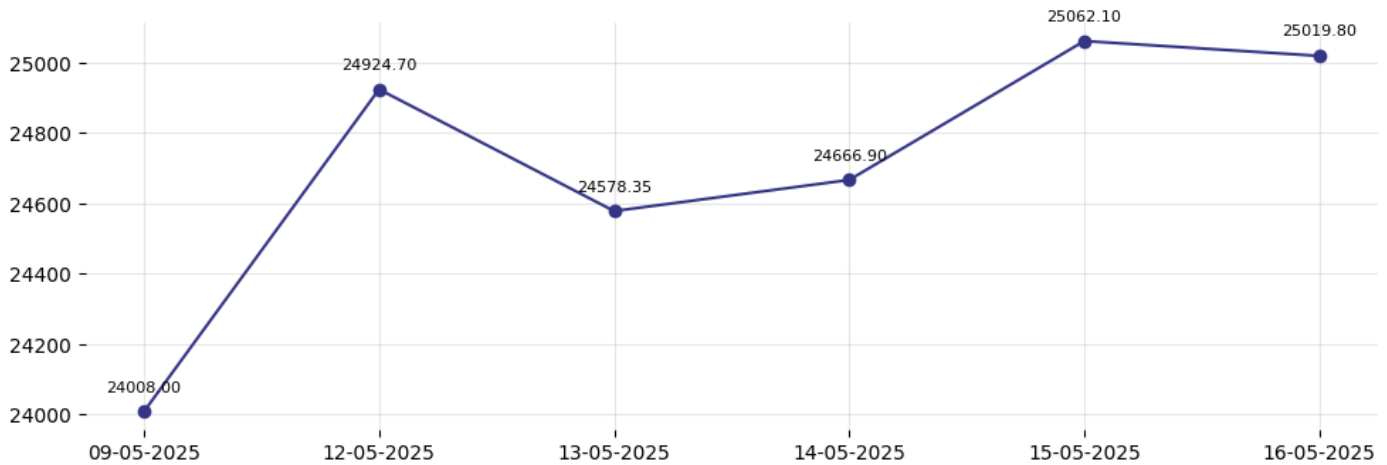
Sectoral Performance

- This week, all major market sectoral indices posted positive returns.
- Nifty Realty registered a positive return of 10.78%. DLF, PRESTIGE, and ANATRAJ led to positive returns in the index.
- Nifty Energy posted a positive return of 6.98% this week. SJVN, GVT&D, and SUZLON were major contributors to the index.
- Nifty Auto registered a positive return of 5.86%, led by HEROMOTOCO, BAJAJ-AUTO, and EXIDEIND.
- Nifty IT posted a positive return of 5.83% this week. The major contributors to the index were COFORGE, LTIM, and OFSS.
- Nifty Bank posted a positive return of 3.28% this week. CANBK, BANKBARODA, and PNB were the top gainers in the index.
- Nifty FMCG posted a positive return this week; the index was up by 2.57%. COLPAL, TATACONSUM, and GODREJCP were the top gainers 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 ₹15,925.41 crore this week. The week ending May 9 saw an inflow of ₹5,087.42 crore. DII showed a net buying of ₹9,557.10 crore this week. DIIs had a net buying of ₹10,450.96 crore last week.

Participant	Amount (Cr.)
FII	15,925.41
DII	9,557.10

Data: Cash Market; Source: NSE, NSDL

Economic Events

Retail inflation in India eased to 3.16% in April 2025, the lowest in nearly six years, driven primarily by a sharp decline in food prices. This marks the sixth consecutive month of moderation, down from 3.34% in March and significantly lower than the 6.21% peak in October 2024. Food and beverages inflation slowed to 2.14%, with vegetable prices contracting by 10.98%, pulses by 5.23%, and meat and fish by 0.35% year-on-year, showing a sustained cooling in food inflation trends. Yet, core inflation, which excludes food, fuel, and light, has risen in all but one month since June last year and remains above 4%, with health and education costs continuing to climb, indicating persistent underlying price pressures.

Wholesale price index (WPI)-based inflation eased to a 13-month low of 0.85% in April 2025, down from 2.05% in March, as prices of food and fuel declined, signalling easing cost pressures at the producer level. Primary articles - including cereals, vegetables, eggs, meat, fish, crude petroleum, and natural gas saw year-on-year price declines.

Nifty Pivot Levels

S2	S1	Pivot	R1	R2
24,100.9	24,560.4	24,838.3	25,297.8	25,575.7

Source: INVES 21 Research

Top 5 Weekly Gainers amongst Nifty 50

Stocks	Change
BEL	15.21%
ADANIEN	13.51%
HEROMOTOCO	12.75%
SHRIRAMFIN	10.65%
BAJAJ-AUTO	10.41%

Source: NSE, INVES 21 Research

Top 5 Weekly Losers amongst Nifty 50

Stocks	Change
INDUSINDBK	-4.64%
BHARTIARTL	-1.86%
SUNPHARMA	-0.57%

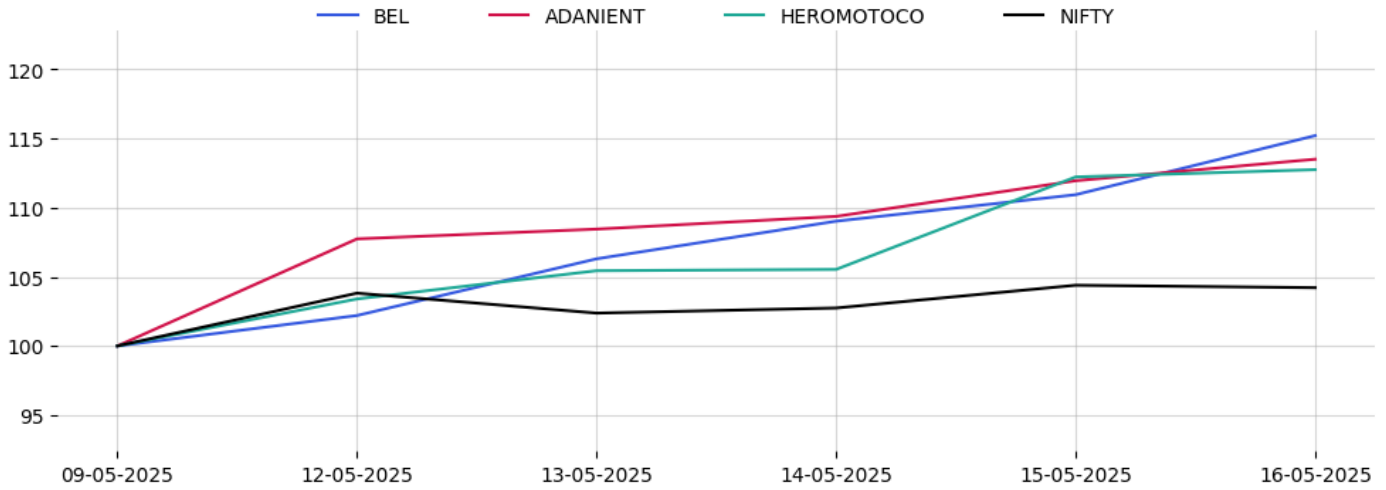
Source: NSE, INVES 21 Research

Volume Busters

Stocks	Volumes
BEL	4,84,37,344
TATASTEEL	4,38,81,765
TATAMOTORS	2,62,01,696

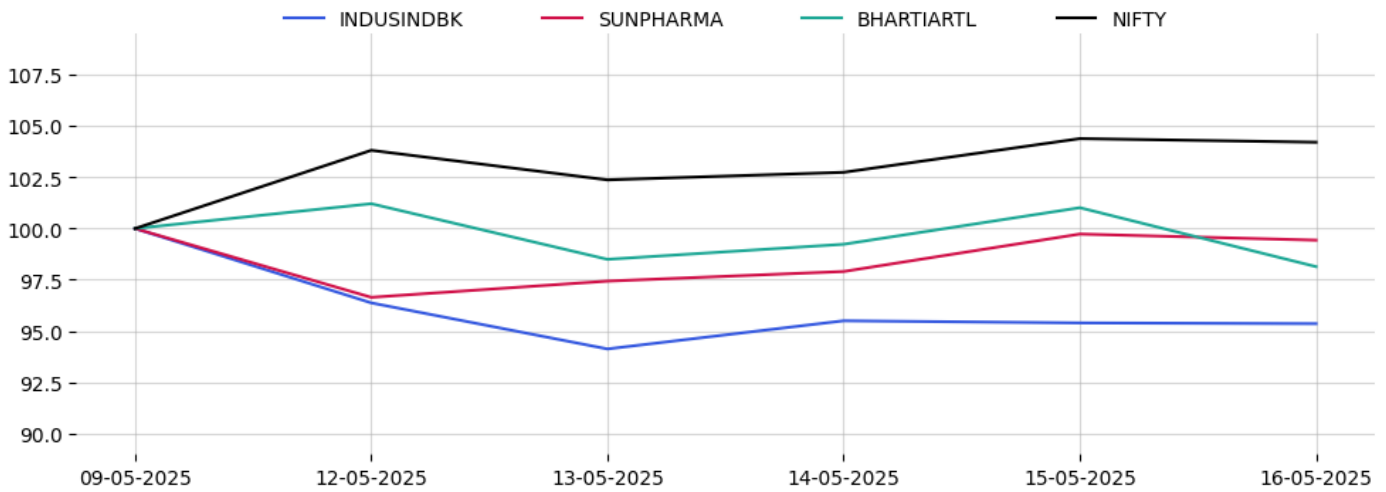
Source: NSE, INVES 21 Research

Top 3 Outperformers of the week



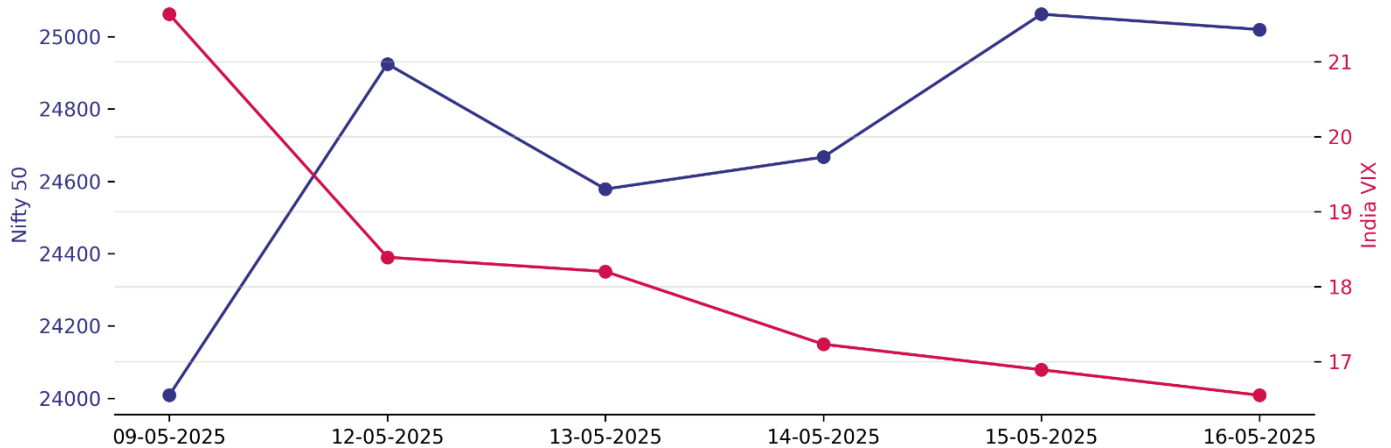
Data: Rebased; Source: NSE, INVES 21 Research

Top 3 Underperformers of the week



Data: Rebased; Source: NSE, INVES 21 Research

India VIX



Source: NSE, INVES 21 Research

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