

MOST
MARKET
ROUNDUP



Nifty : 25,939.05 148.10 (0.57%)

Sensex : 84,928.61 384.30 (0.45%)

- Equity benchmarks Sensex and Nifty reached new all-time highs, buoyed by strong foreign fund inflows and a rally in Asian markets. Auto, PSU banks, and realty stocks were biggest gainer today. Selected mid-cap and small-cap stocks also joined the upward trend. The Nifty Bank Index made impressive gains, closing at a record high, driven by private sector leader HDFC Bank following the announcement of its subsidiary HDB Financial Services' initial public offering.
- On Friday, foreign institutional investors (FIIs) were net buyers, contributing over ₹14,000 crore in cash markets. Additionally, they significantly increased their bullish positions in index futures, including those linked to the NSE Nifty 50, reaching over 500,000 contracts—the highest since 2015. The Sensex rose 384 points (0.5%) to an all-time high of 84,928, while the Nifty jumped 148 points (0.6%) to a record 25,939. The India Vix increased by 9%, closing above the 13 mark.
- Most Asian markets also rose on Monday, continuing last week's rally after the Federal Reserve's substantial interest rate cut, with attention now on the release of the bank's preferred inflation measure later this week.
- PSU banking stocks saw renewed buying, with the Nifty PSU Bank Index climbing 3%. There is optimism for strong quarterly results and improved asset quality, benefiting banks like SBI, Indian Bank, Bank of Baroda, and PNB, which rose between 3-5%. Realty stocks experienced significant gains due to strong demand, with the Nifty Realty Index soaring 2%.

Technical Outlook:

- Nifty Index opened gap up by 80 points and continued holding on to higher zones. The first half of the day witnessed consolidation but was followed a good action and the index hit a fresh all time high of 25956 levels. It gave the highest ever closing and closed at it higher band with gains of around 150 points. It formed a bullish candle on daily frame and has been forming highs from the last four sessions.
- Now it has to hold above 25850 zones for an up move towards 26050 then 26200 zones whereas supports are placed at 25850 then 25750 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.57% at 25915 levels. Positive setup in Escorts, MGL, DLF, IEX, M&M, JK Cement, M&MFin, Bosch Ltd, MFSL, Bajaj Auto, ICICI Pru, Motherson, UBL, Heromotoco, SBI Life, Trent, Dixon, Cumminsind, Havells, Indhotel, Hindunilvr, MCX, Kotak Bank, Ultracemco, HDFC Bank and Titan while weakness in Alkem, Syngene, Concor, Auro Pharma, TCS, Grasim, Bharatforg and Zydus Life.
- On option front, Maximum Call OI is at 27000 then 26000 strike while Maximum Put OI is at 25500 then 25000 strike. Call writing is seen at 27000 then 25900 strike while Put writing is seen at 25900 then 25800 strike. Option data suggests a broader trading range in between 25500 to 26500 zones while an immediate range between 25700 to 26200 levels.

- NBCC (India) – Company has secured a project worth ₹1,261 crore from the Ministry of Health and Family Welfare, Government of India.
- Gail India to Restart Dabhol LNG Import Terminal From Sunday - The state-owned pipeline utility will resume operations at its Dabhol LNG import terminal on the west coast from Sept. 29 as the monsoon period is getting over. The terminal, which lacks breakwater facility to anchor ships in turbulent seas, was shut in May ahead of the start of the June-September rainy season
- Bajaj Healthcare - Company is in development and supply pact for active pharmaceutical ingredients with a European entity, it said in an exchange filing. The API will be supplied in small quantities, which European entities will use with European partner to carry out clinical trials for an alternative indication.
- PSP Projects – Company received construction order worth Rs 555 crore. The company will construct Gold Stone Hotel and Commercial Towers at Bangalore for Rs 389.29 crore in institutional category, it said in an exchange filing. Additionally, PSP Projects will construct Residential Towers in Ahmedabad Rs 165.04 crore.
- Fortis Healthcare - Indrajit Banerjee will replace Ravi Rajagopal as Fortis Healthcare Chairman From October 1
- Doms Industries – Company acquired 51.77% stakes in Uniclax Healthcare. The acquisition is to allow increase addressable market & expand long-term distribution network
- Dreamfolks Services – Company resolved integration issue at Adani Airports. The company has ensured seamless acceptance of all eligible cards at lounges moving forward. Implemented solution to guarantee smooth transaction for passengers and stakeholders

Global Market Update

- European Market - European stocks were mostly higher on Monday and as traders digested some disappointing Eurozone data , including French and German PMI surveys that came in much weaker than expected. UK, Germany and France Index gained 0.2% each.
- Asian Market - Most Asian markets rose Monday, building on last week's rally following the Federal Reserve's bumper interest rate cut, with focus now on the release of the bank's favoured inflation gauge later in the week. South Korea, Taiwan, China and Hong Kong Index marginally gain.

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,939	25,847	25,805	25,872	25,914	25,981	26,023	25,956
ADANIEN	3,035	3,015	2,985	3,010	3,040	3,065	3,095	3,070
ADANIPTS	1,458	1,444	1,438	1,448	1,454	1,463	1,469	1,459
APOLLOHOSP	7,150	7,090	7,049	7,100	7,141	7,191	7,232	7,182
ASIANPAINT	3,274	3,273	3,239	3,257	3,291	3,308	3,342	3,325
AXISBANK	1,246	1,241	1,234	1,240	1,246	1,252	1,258	1,252
BAJAJ-AUTO	12,379	12,000	11,873	12,126	12,253	12,506	12,633	12,380
BAJAJFINSV	1,917	1,915	1,902	1,910	1,922	1,929	1,941	1,934
BAJFINANCE	7,590	7,532	7,482	7,536	7,586	7,640	7,690	7,636
BHARTIARTL	1,751	1,719	1,706	1,729	1,741	1,764	1,777	1,754
BPCL	338	331	328	333	336	342	345	340
BRITANNIA	6,206	6,191	6,156	6,181	6,216	6,241	6,275	6,250
CIPLA	1,659	1,638	1,627	1,643	1,654	1,670	1,681	1,665
COALINDIA	502	491	486	494	498	506	510	503
DIVISLAB	5,386	5,365	5,226	5,306	5,444	5,524	5,663	5,583
DRREDDY	6,646	6,580	6,547	6,597	6,629	6,679	6,711	6,662
EICHERMOT	4,882	4,855	4,773	4,827	4,909	4,964	5,046	4,991
GRASIM	2,670	2,665	2,640	2,655	2,680	2,695	2,720	2,705
HCLTECH	1,751	1,733	1,718	1,734	1,749	1,766	1,781	1,764
HDFCBANK	1,757	1,740	1,728	1,743	1,755	1,769	1,781	1,766
HDFCLIFE	728	714	708	718	724	734	740	730
HEROMOTOCO	6,190	6,004	5,929	6,060	6,135	6,265	6,340	6,210
HINDALCO	688	688	681	685	691	695	701	698
HINDUNILVR	3,028	2,970	2,946	2,987	3,011	3,052	3,076	3,035
ICICIBANK	1,322	1,309	1,297	1,310	1,321	1,333	1,344	1,332

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INDUSINDBK	1,465	1,453	1,432	1,449	1,470	1,486	1,508	1,491
INFY	1,895	1,878	1,857	1,876	1,897	1,916	1,938	1,919
ITC	517	514	511	514	517	520	522	519
JSWSTEEL	983	976	970	976	982	988	994	988
KOTAKBANK	1,936	1,908	1,895	1,916	1,929	1,949	1,963	1,942
LT	3,785	3,749	3,701	3,743	3,791	3,833	3,881	3,839
LTIM	6,327	6,287	6,218	6,272	6,341	6,396	6,465	6,410
M&M	3,047	2,956	2,919	2,983	3,020	3,084	3,121	3,057
MARUTI	12,667	12,625	12,556	12,612	12,680	12,736	12,804	12,749
NESTLEIND	2,724	2,690	2,675	2,699	2,715	2,739	2,754	2,730
NTPC	429	425	423	426	428	431	434	431
ONGC	295	288	284	290	293	298	302	296
POWERGRID	342	340	339	341	342	343	344	343
RELIANCE	2,985	2,978	2,964	2,974	2,989	2,999	3,014	3,003
SBILIFE	1,920	1,880	1,863	1,892	1,908	1,937	1,953	1,925
SBIN	801	785	776	788	797	809	817	805
SHRIRAMFIN	3,561	3,540	3,499	3,530	3,571	3,602	3,643	3,612
SUNPHARMA	1,867	1,858	1,849	1,858	1,867	1,876	1,884	1,875
TATACONSUM	1,212	1,210	1,195	1,204	1,219	1,227	1,242	1,234
TATAMOTORS	972	966	959	966	973	979	986	979
TATASTEEL	154	153	152	153	154	155	155	154
TCS	4,266	4,253	4,220	4,243	4,276	4,299	4,333	4,309
TECHM	1,606	1,595	1,574	1,590	1,611	1,627	1,647	1,631
TITAN	3,814	3,781	3,760	3,787	3,808	3,835	3,856	3,829
ULTRACEMCO	11,990	11,800	11,731	11,861	11,929	12,059	12,127	11,998
WIPRO	533	532	527	530	535	538	544	540

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