

# **MOS** **MARKET** **ROUNDUP**



**Nifty : 24,194.50 -27.40 (-0.11%)**

**Sensex : 80,004.06 -105.79 (-0.13%)**

- Equity benchmarks Nifty and Sensex saw a slight decline due to profit booking after a rally in the previous two sessions. Moreover, global equities also weakened as traders assessed the potential impact of additional US tariffs on China, Mexico, and Canada. Selling pressure was seen in auto and pharma stocks, while telecom, FMCG, and IT sectors posted notable gains. Investors shifted focus from large-cap to small-cap stocks, with the Nifty Small Cap Index rising 1%. As a result, the advance-decline ratio for Nifty 500 stocks was 1.4:1. The Sensex ended at 80,004.06, down by 105 points or 0.13%, while the Nifty fell 27 points or 0.1%, closing at 24,194.50.
- Auto stocks experienced a significant drop due to profit-taking, with the Nifty Auto Index falling 1.5%. Bajaj Auto, Maruti, M&M, and Tata Motors saw declines ranging from 1% to 3%. Telecom stocks gained following news that the Cabinet had approved a proposal to waive bank guarantees (BG) of over Rs 30,000 crore that telecom operators were required to provide for spectrum purchases until 2022. This decision is expected to provide considerable relief to major telecom firms. Vodafone Idea surged 8%, closing at Rs 7.50, while reaching an intra-day high of Rs 8.28. TTML rose 16%, closing at Rs 80.50. Tech stocks continued their upward trend on expectations of increased US spending under the Trump administration, which is seen as positive for domestic IT companies. The Nifty IT Index gained 1%, reaching a record high of 44,085, with TCS, LTIMindtree, Persistent, and Infosys up between 1-2%. FMCG stocks saw fresh buying due to expectations of increased government spending and a good monsoon boosting rural demand. The Nifty FMCG Index rose nearly 1%, with stocks like Colgate, Marico, Britannia, Varun Beverages, Godrej Consumers, and United Spirits gaining between 2-4%

### Technical Outlook:

- Nifty Index opened positive but failed to hold its morning gains and couldn't surpass its previous day's high. It witnessed some pressure within a range and broke its previous day's low. It formed a bearish candle on daily frame and follow up is missing in action. Now it has to hold above 24150 zones for an up move towards 24350 then 24500 zones, whereas supports are placed at 24150 and 24000 zones.

### Derivative Outlook:

- Nifty future closed negative with losses of 0.28% at 24205 levels. Positive setup seen in PEL, Biocon, Granules, CUB, Apollo Tyres, Laurus Labs, Oberoi Realty, Jubilant Foods, HAL, BEL, Infosys and LTI Mindtree while weakness in Adani Ent, Lupin, Baja Auto, Adani Ports, Can Fin Homes, Gail, Ambuja Cements, NTPC, Coal India, IGL, Maruti, Bajaj Finance and Tata Power.
- On option front, Maximum Call OI is at 25000 then 24500 strike while Maximum Put OI is at 23500 then 24000 strike. Call writing is seen at 24500 then 24400 strike while Put writing is seen at 24100 then 24000 strike. Option data suggests a broader trading range in between 23700 to 24700 zones while an immediate range between 24000 to 24500 levels.



- TCS – Company signed a three-year extension for its contract with System for Pension Administration Raksha (SPARSH) portal, India's central web-based system for automating pension processes for defense personnel, to streamline pension distribution for over 3 million defense pensioners in India.
- Astrazeneca Pharma – Company has received Central Drugs Standard Control Organisation nod for import for sale, distribution for additional indication of Olaparib tablets
- HCL Tech – Company launched Enterprise Data Security Service In Collaboration with Intel.
- L&T Finance – Company has entered into an agreement with Amazon India for providing credit solutions,
- Maruti Suzuki I- Company's exports guidance for financial year 2025 stands at 3 lakh. Exports is very strategic for us, said Rahul Bharti, executive director, Corporate Affairs.
- Krystal Integrated – Company has received a work order worth Rs 106 crore from the Brihanmumbai Municipal Corporation,
- Zen Technologies – Company announced grant of Indian patent for 'T90 Containerized Crew Gunnery Simulator'
- LT Foods Opens New Office in Saudi Arabia – Company has forayed into the Saudi Arabian market, with the opening of a new office in Riyadh. Company plans to invest 185 million Saudi Arabian riyals in warehousing, stocks, and people over the next five years in Saudi Arabia and targets a revenue of 435 million Saudi riyals over the next five years.

### Global Market Update

- European Market - European equities fell as President-elect Donald Trump's tariff threats weighed on already-shaky sentiment in the region. UK, Germany and France Index declined 0.5% each.
- Asian Market - Asian stocks fell as traders mulled the potential impact of additional US tariffs on China as well as Mexico and Canada. Japan, Australia, Taiwan and South Korea Index declined up to 0.5%

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	24,195	24,125	24,003	24,099	24,221	24,317	24,439	24,343
ADANIENT	2,167	2,136	2,042	2,104	2,199	2,261	2,355	2,293
ADANIPTS	1,132	1,119	1,087	1,109	1,142	1,164	1,197	1,174
APOLLOHOSP	7,059	7,043	7,002	7,030	7,071	7,100	7,141	7,112
ASIANPAINT	2,506	2,458	2,433	2,470	2,494	2,530	2,554	2,518
AXISBANK	1,143	1,143	1,132	1,137	1,149	1,154	1,165	1,160
BAJAJ-AUTO	9,151	9,120	8,888	9,019	9,252	9,383	9,616	9,484
BAJAJFINSV	1,594	1,582	1,564	1,579	1,597	1,612	1,630	1,615
BAJFINANCE	6,625	6,608	6,527	6,576	6,658	6,707	6,789	6,740
BEL	298	293	289	294	297	301	305	301
BHARTIARTL	1,578	1,566	1,544	1,561	1,583	1,600	1,622	1,605
BPCL	294	293	288	291	296	299	304	301
BRITANNIA	5,012	4,893	4,841	4,927	4,978	5,064	5,116	5,030
CIPLA	1,497	1,490	1,476	1,486	1,501	1,511	1,526	1,515
COALINDIA	412	410	403	407	414	418	424	420
DRREDDY	1,212	1,203	1,196	1,204	1,211	1,219	1,226	1,218
EICHERMOT	4,947	4,875	4,806	4,877	4,945	5,016	5,085	5,014
GRASIM	2,610	2,602	2,580	2,595	2,617	2,632	2,655	2,640
HCLTECH	1,900	1,889	1,876	1,888	1,901	1,914	1,927	1,915
HDFCBANK	1,786	1,770	1,749	1,767	1,789	1,808	1,829	1,810
HDFCLIFE	682	675	665	673	683	692	702	693
HEROMOTOCO	4,833	4,801	4,758	4,796	4,838	4,876	4,919	4,881
HINDALCO	665	659	654	659	665	670	676	670
HINDUNILVR	2,478	2,460	2,443	2,461	2,478	2,495	2,512	2,495
ICICIBANK	1,305	1,302	1,295	1,300	1,307	1,312	1,319	1,314

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INDUSINDBK	1,010	998	989	999	1,008	1,019	1,028	1,018
INFY	1,920	1,897	1,877	1,899	1,919	1,940	1,960	1,939
ITC	477	474	469	473	478	482	486	483
JSWSTEEL	962	951	943	952	960	969	976	967
KOTAKBANK	1,782	1,775	1,764	1,773	1,784	1,794	1,805	1,796
LT	3,700	3,690	3,650	3,675	3,715	3,740	3,780	3,755
M&M	3,005	2,953	2,893	2,949	3,009	3,065	3,124	3,068
MARUTI	10,936	10,891	10,782	10,859	10,968	11,045	11,155	11,078
NESTLEIND	2,268	2,251	2,231	2,250	2,269	2,287	2,306	2,288
NTPC	362	360	354	358	364	368	374	370
ONGC	255	253	249	252	255	258	261	258
POWERGRID	338	338	333	336	340	342	347	345
RELIANCE	1,296	1,284	1,279	1,287	1,293	1,301	1,306	1,298
SBILIFE	1,505	1,489	1,476	1,491	1,504	1,518	1,531	1,517
SBIN	838	836	829	834	840	845	851	847
SHRIRAMFIN	3,044	2,949	2,894	2,969	3,024	3,099	3,154	3,079
SUNPHARMA	1,763	1,753	1,721	1,742	1,774	1,796	1,828	1,807
TATACONSUM	963	952	945	954	961	970	976	967
TATAMOTORS	784	780	767	776	789	797	810	802
TATASTEEL	144	144	142	143	145	146	147	146
TCS	4,351	4,310	4,286	4,318	4,343	4,375	4,399	4,367
TECHM	1,747	1,731	1,716	1,731	1,747	1,762	1,777	1,762
TITAN	3,325	3,296	3,273	3,299	3,321	3,347	3,370	3,344
TRENT	6,654	6,646	6,539	6,597	6,703	6,761	6,868	6,810
ULTRACEMCO	11,111	11,106	10,847	10,979	11,238	11,370	11,629	11,497
WIPRO	588	579	575	582	586	593	597	590

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