

**MOST**  
**MARKET**  
**ROUNDUP**



**Nifty : 24,141.30 -6.90 (-0.03%)**

**Sensex : 79,496.15 9.83 (+0.01%)**

- The equity benchmark indices ended on a flat note as profit-taking erased earlier gains, amid concerns over global market volatility and continued selling by foreign institutional investors (FIIs). FMCG stocks weighed on the market, dragging it down from its intraday highs, while buying interest was seen in IT and banking stocks. Nifty mid-cap and small-cap stocks experienced selling pressure due to profit booking, with the advance-decline ratio for Nifty 500 stocks standing at 1:2.5. The Sensex inched up by 9 points, or 0.1%, to close at 79,496, while the Nifty slipped by 6 points, or 0.10%, to finish at 24,141, after reaching an intraday high of 24,336. FMCG stocks were the major losers, particularly after Asian Paints reported disappointing Q2 results. The Nifty FMCG Index fell by 1%, with Asian Paints plunging 8% to close at Rs 2,543, and Britannia dropping over 5% to Rs 5,785. On the other hand, IT stocks continued to rally, driven by optimism around higher US tech spending under a potential Donald Trump presidency. The Nifty IT Index gained 1%, led by Infosys, HCL Tech, Coforge, and Tech Mahindra.
- In global markets, Chinese economic stimulus measures announced on Friday disappointed investors, leading to a nearly 2% drop in the Hong Kong Index. Meanwhile, US indices reached record highs, buoyed by strong consumer sentiment data and expectations that President Donald Trump's pro-growth policies will continue to benefit Corporate America

### Technical Outlook:

- Nifty Index opened negative but bulls took over in the initial couple of hours which was followed by wiping off its intraday gains. It dropped to 24000 levels and has been making lower lows from the last three sessions. It slightly recovered in the last hour and managed to close near 24150 zones. It formed an outside Bar and a Doji sort of candle on daily frame indicating indecisiveness and tug of war between the bulls and bears. Now till it holds below 24150 zones, some weakness could be seen towards 24000 then 23850 zones while hurdles are placed at 24350 and 24500 zones.

### Derivative Outlook:

- Nifty future closed positive with gains of 0.03% at 24226 levels. Positive setup in Biocon, PFC, Powergrid, Naukri, OFSS, INFY, Tech Mahindra, TCS, Wipro, HDFC Bank, HAL, BEL, Axis Bank, Persistent, Oberoi Realty, ICICI Bank while weakness in ICICI Prudential life, Bandhan Bank, Titan, AU Bank, Grasim, Lupin, SBI Card, NTPC, Lupin, Colpal, IEX, Exide Industries, Bajaj Finance, MGL, Havells
- On option front, Maximum Call OI is at 25000 then 24500 strike while Maximum Put OI is at 23000 then 23500 strike. Call writing is seen at 24300 then 24500 strike while Put writing is seen at 24000 then 23600 strike. Option data suggests a broader trading range in between 23700 to 24600 zones while an immediate range between 23900 to 24400 levels.



- INOX India – Company has secured a contract of an undisclosed amount from Bahamas-based Island Power Producer (IPP) for turnkey design, engineering, and supply of a mini LNG receiving and re-gasification terminal at the Bahamas.
- INOX India – Company wins a contract to set up Mini LNG Terminal for Island Power producer Limited at The Bahamas
- Alembic Pharma – Company gets US FDA approval for Cardizem CD Generic. Cardizem CD is a calcium channel blocker used to treat high blood pressure and prevent chest pain
- Solar Industries – Company secures an export order worth Rs 580cr from an international client to supply defense products over five years
- KP Green Engineering – Company appoints Alok Das as a Group CEO of the company
- HFCL Gets \$968M Broadband Network Orders, Including With Partner - An alliance of HFCL Ltd. and RVNL has been declared as the lowest bidder for Rs 6930cr project of Bharat Sanchar Nigam for middle-mile broadband network in Uttar Pradesh state
- Devyani Q2 Income Rs1222cr (up 49.2% YoY), Net profit Rs1.7 lakh vs Rs33.7cr (YoY), Ebitda Rs195.5cr (up 27% YoY), Ebitda margin 16% vs 18.8% (YoY)
- Zydus Wellness Q2 Income Rs493cr (up 12% YoY), Net profit Rs21cr (up 240% YoY), Ebitda Rs195.5cr (up 27% YoY), Ebitda margin 16% vs 18.8% (YoY)
- Concord Biotech Q2 Income Rs310cr (up 18% YoY), Net profit Rs96cr (up 18% YoY), Ebitda Rs136cr (up 15% YoY), Ebitda margin 44% vs 45.3% (YoY)

### Global Market Update

- European Market - European stocks rose on Monday, attempting to rebound after three straight weeks of declines that were driven by concerns over the possibility of US trade tariffs. Germany Index is up 1% while UK and France Index gained 1% each. Germany Index soared over 1% after the German auto parts maker reported earnings and Hannover Re shares advanced as the reinsurer raised its 2024 profit target.
- Asian Market – Asian shares finished mixed, as corporate earnings combined with uncertainty around the prime ministerial vote had investors struggling for direction. Disappointing Chinese economic stimulus measures announced Friday also weighed on sentiment. Japan's Nikkei Index marginally gained while Hong Kong Index slipped 1.7%

## Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	24,141	24,005	23,829	23,985	24,161	24,317	24,493	24,337
ADANIENT	2,903	2,888	2,854	2,878	2,913	2,937	2,971	2,947
ADANIPTS	1,343	1,339	1,328	1,335	1,347	1,354	1,365	1,358
APOLLOHOSP	7,155	6,983	6,726	6,940	7,197	7,412	7,669	7,454
ASIANPAINT	2,548	2,506	2,458	2,503	2,551	2,596	2,644	2,599
AXISBANK	1,169	1,143	1,129	1,149	1,163	1,183	1,197	1,177
BAJAJ-AUTO	9,910	9,800	9,681	9,796	9,914	10,029	10,147	10,033
BAJAJFINSV	1,720	1,713	1,689	1,705	1,728	1,744	1,767	1,752
BAJFINANCE	6,765	6,752	6,655	6,710	6,807	6,862	6,959	6,904
BEL	299	294	290	295	299	304	309	304
BHARTIARTL	1,557	1,552	1,534	1,545	1,563	1,575	1,593	1,582
BPCL	313	304	300	307	310	317	320	314
BRITANNIA	5,405	5,401	5,068	5,237	5,569	5,738	6,070	5,902
CIPLA	1,550	1,545	1,509	1,530	1,565	1,585	1,620	1,600
COALINDIA	422	417	413	418	422	426	430	426
DRREDDY	1,286	1,262	1,248	1,267	1,281	1,300	1,314	1,295
EICHERMOT	4,789	4,750	4,708	4,749	4,791	4,831	4,873	4,833
GRASIM	2,515	2,506	2,477	2,496	2,525	2,544	2,573	2,554
HCLTECH	1,870	1,834	1,819	1,845	1,859	1,885	1,899	1,874
HDFCBANK	1,764	1,751	1,734	1,749	1,766	1,781	1,798	1,783
HDFCLIFE	706	696	689	697	704	713	720	712
HEROMOTOCO	4,750	4,718	4,683	4,716	4,751	4,785	4,820	4,786
HINDALCO	655	639	632	643	650	662	669	658
HINDUNILVR	2,491	2,475	2,454	2,473	2,494	2,512	2,534	2,515
ICICIBANK	1,269	1,247	1,234	1,252	1,264	1,281	1,293	1,276

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INDUSINDBK	1,058	1,040	1,028	1,043	1,055	1,071	1,083	1,068
INFY	1,859	1,823	1,804	1,832	1,850	1,877	1,895	1,868
ITC	477	474	470	474	478	481	485	482
JSWSTEEL	981	972	959	970	983	994	1,006	995
KOTAKBANK	1,740	1,737	1,721	1,731	1,747	1,757	1,773	1,763
LT	3,625	3,606	3,576	3,600	3,631	3,655	3,686	3,661
M&M	2,920	2,889	2,819	2,870	2,940	2,990	3,060	3,010
MARUTI	11,390	11,310	11,198	11,294	11,406	11,502	11,614	11,518
NESTLEIND	2,285	2,254	2,237	2,261	2,278	2,302	2,319	2,295
NTPC	393	392	386	390	395	399	404	401
ONGC	257	256	252	255	259	261	265	262
POWERGRID	330	313	305	318	325	337	345	332
RELIANCE	1,273	1,267	1,256	1,265	1,275	1,284	1,294	1,286
SBILIFE	1,568	1,555	1,544	1,556	1,567	1,579	1,591	1,579
SBIN	846	842	835	841	847	853	859	854
SHRIRAMFIN	2,999	2,958	2,905	2,952	3,005	3,051	3,104	3,057
SUNPHARMA	1,794	1,792	1,775	1,784	1,801	1,810	1,827	1,818
TATACONSUM	977	973	958	967	983	992	1,007	998
TATAMOTORS	805	792	770	788	809	827	849	831
TATASTEEL	145	144	142	144	146	147	149	148
TCS	4,187	4,118	4,063	4,125	4,179	4,241	4,296	4,234
TECHM	1,705	1,666	1,646	1,676	1,696	1,725	1,745	1,715
TITAN	3,203	3,158	3,125	3,164	3,197	3,236	3,269	3,230
TRENT	6,463	6,212	6,024	6,243	6,432	6,651	6,840	6,620
ULTRACEMCO	10,961	10,896	10,775	10,868	10,989	11,082	11,203	11,110
WIPRO	573	566	557	565	574	582	591	583



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