

MOST Market Roundup



Market Update

Nifty : 25,112.40 +319.15 (+1.29%) Sensex : 82,408.17 +1046.30 (+1.29%)

- Equity benchmark Sensex surged over 1,000 points, while the Nifty closed above the 25,100 mark, snapping a three-day losing streak, as market sentiment improved following a statement from the White House that President Donald Trump would decide within two weeks on possible military action against Iran—easing fears of immediate U.S. involvement. Global markets also rallied, with Asian and European indices rising around 1%, and Brent crude prices falling over 3% amid reduced geopolitical tension concerns.
- The market witnessed broad-based buying, as traders covered short positions on hopes of de-escalation in the Israel-Iran conflict. Sensex jumped 1,046 points, or 1.3%, to close at 82,408, while Nifty gained 319 points, or 1.3%, ending at 25,112. Rebalancing in FTSE and Sensex indices further supported gains in mid-cap and small-cap stocks. Previously underperforming sectors such as Nifty PSU Banks, Realty, IT, Metal, and Oil & Gas rose between 1–2%, while both Nifty Defence and Auto indices advanced by 2% and 1%, respectively.
- Among the major Nifty gainers like Bharati Airtel, Reliance, HDFC Bank, M&M, Trent and Jio Finance gained between 2-3%. Among the major small cap and mid cap gainers today – Waaree Enetrgy, BEML, Rattan India, NTPC Green, Hyundai and GO-Digit surged between 5-12%.

Technical Outlook:

- Nifty index opened flattish and despite a subdued start, it witnessed a rally of around 350 points. It crossed the 25k barrier to touch an intraday high of 25135 and closed near its day's high zone with gains of around 320 points. Positive global cues and easing geopolitical concerns resulted in an upward trajectory and it recovered most of the losses of the previous week. The strong buying interest in the last hour indicates a decisive shift in the trading band and commencement of a fresh leg of rally.
- It formed a bullish Marubozu candle on the daily frame and a bullish candle on the weekly frame, on the verge of a potential Pole & Flag breakout. Now it has to continue to hold above 25000, for an up move towards 25250 and 25500 zones while supports have shifted higher to 24950 then 24800 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 1.18% at 25096 levels. Positive setup seen in Max Healthcare, JIOFIN, M&M, MCX, Bharti Airtel, Persistent, Manappuram Finance, Astral, Aditya Birla Capital and BEL while weakness in Tata Technologies, Bajaj Auto, Godrej CP, United Spirits, ACC, Bank of India, Apollo Tubes, Mankind Pharma, PNB and IOC.
- On option front, Maximum Call OI is at 25500 then 26000 strike while Maximum Put OI is at 24800 then 25000 strike. Call writing is seen at 25500 then 25600 strike while Put writing is seen at 24900 then 25000 strike. Option data suggests a broader trading range in between 24600 to 25600 zones while an immediate range between 24900 to 25300 levels.

Today's News

- **ACME Solar** has entered into a Power Purchase Agreement (PPA) with NHPC for a 250 MW renewable energy project in Rajasthan.
- **Govt. imposes Five-year Anti-dumping Duties on aluminum foil Imports from China, Taiwan, Russia** - The government imposed five-year anti-dumping duties on imports of aluminium foil, Pretilachlor, and Acetonitrile from China, Taiwan, and Russia after finding evidence of unfair trade practices that caused harm to domestic industries.
- **Sai Life Sciences** - Company has begun commercial operations of the second phase of the production block with 91 kiloliter of capacity at its Bidar facility in Karnataka. This is the second and final phase of the unit's overall capacity addition of 195 kiloliter.
- **HAL Wins Bid to Make India's Small Satellite Launch Rockets** - Company has won a bid to manufacture and launch small satellite rockets for the Indian Space Research Organisation.
- **Transformers and Rectifiers** - Company securing a \$16.65 million export order from Jindal Energy.
- **HDFC Bank** - Company announce AGM will be held August 8, 2025, Friday.

Global Market Update

- **European Market** - European equities rose on Friday as investors had some respite from geopolitical worries after US President Donald Trump said he would decide within two weeks whether to strike Iran. Both Germany and France Index gained 1% each.
- **Asian Market** - Asian markets witnessed mixed bag. The Hang Seng China Enterprises Index closes 1.4% higher after US President Donald Trump said he would decide within the next two weeks whether to strike Iran, easing concern of more immediate involvement.. Japan Index declined by 0.2%.
- **US Data** - Fed Business Outlook.
- **Commodity** - Oil slumped after President Donald Trump signaled a decision on whether to strike Iran will be made within two weeks, easing fears about an imminent attack from the US. Brent tumbled as much as 3.5% to trade below \$77 a barrel.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,112	24,784	24,658	24,885	25,011	25,238	25,363	25,136
ADANIENT	2,450	2,415	2,396	2,423	2,442	2,469	2,488	2,461
ADANIPTS	1,354	1,335	1,326	1,340	1,348	1,362	1,371	1,357
APOLLOHOSP	7,055	6,975	6,933	6,994	7,036	7,097	7,138	7,077
ASIANPAINT	2,280	2,263	2,251	2,265	2,277	2,292	2,304	2,290
AXISBANK	1,216	1,214	1,207	1,212	1,219	1,223	1,231	1,226
BAJAJ-AUTO	8,345	8,250	8,180	8,262	8,333	8,415	8,486	8,403
BAJAJFINSV	1,977	1,965	1,946	1,962	1,980	1,995	2,014	1,999
BAJFINANCE	902	886	877	890	899	911	920	908
BEL	407	398	393	400	405	412	417	410
BHARTIARTL	1,934	1,874	1,844	1,889	1,919	1,964	1,994	1,949
CIPLA	1,493	1,481	1,467	1,480	1,494	1,507	1,521	1,508
COALINDIA	388	384	380	384	388	392	396	392
DRREDDY	1,323	1,318	1,309	1,316	1,325	1,332	1,342	1,335
EICHERMOT	5,512	5,495	5,469	5,491	5,516	5,538	5,563	5,542
ETERNAL	253	249	247	250	252	255	257	254
GRASIM	2,703	2,683	2,656	2,680	2,706	2,729	2,756	2,733
HCLTECH	1,737	1,709	1,696	1,716	1,730	1,750	1,763	1,743
HDFCBANK	1,963	1,932	1,917	1,940	1,955	1,978	1,993	1,970
HDFCLIFE	778	758	749	764	772	787	796	781
HEROMOTOCO	4,331	4,205	4,129	4,230	4,306	4,407	4,484	4,382
HINDALCO	644	639	630	637	646	653	662	655
HINDUNILVR	2,302	2,292	2,282	2,292	2,302	2,313	2,323	2,313
ICICIBANK	1,426	1,410	1,400	1,413	1,423	1,436	1,446	1,433
INDUSINDBK	844	829	822	833	840	852	859	848

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INFY	1,618	1,609	1,597	1,608	1,619	1,630	1,641	1,631
ITC	417	416	414	416	418	419	421	420
JIOFIN	294	283	279	286	291	298	303	295
JSWSTEEL	1,008	994	978	993	1,008	1,023	1,039	1,024
KOTAKBANK	2,171	2,131	2,115	2,143	2,159	2,188	2,204	2,176
LT	3,658	3,614	3,591	3,625	3,647	3,681	3,703	3,670
M&M	3,190	3,090	3,048	3,119	3,161	3,232	3,274	3,203
MARUTI	12,787	12,728	12,640	12,713	12,802	12,875	12,964	12,890
NESTLEIND	2,383	2,319	2,288	2,335	2,367	2,414	2,446	2,398
NTPC	334	330	327	331	333	337	340	336
ONGC	251	249	247	249	251	253	255	253
POWERGRID	293	285	281	287	291	296	300	295
RELIANCE	1,464	1,428	1,412	1,438	1,454	1,481	1,497	1,471
SBILIFE	1,811	1,779	1,762	1,786	1,804	1,828	1,846	1,821
SBIN	795	786	780	788	794	801	807	799
SHRIRAMFIN	664	651	641	653	662	673	682	671
SUNPHARMA	1,663	1,646	1,635	1,649	1,660	1,674	1,684	1,670
TATACONSUM	1,091	1,083	1,072	1,081	1,092	1,102	1,113	1,103
TATAMOTORS	676	670	666	671	675	680	684	679
TATASTEEL	152	151	149	150	152	153	154	153
TCS	3,429	3,411	3,393	3,411	3,429	3,447	3,464	3,446
TECHM	1,696	1,669	1,652	1,674	1,691	1,713	1,731	1,709
TITAN	3,510	3,489	3,459	3,485	3,515	3,541	3,571	3,545
TRENT	5,950	5,720	5,590	5,770	5,900	6,080	6,210	6,030
ULTRACEMCO	11,475	11,370	11,302	11,388	11,457	11,543	11,612	11,525
WIPRO	266	263	261	263	265	268	270	267

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