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19-Aug-25

MOSt Market Roundup

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Market Update

Nifty : 24,980.65 103.70 (0.42%) **Sensex : 81,644.39 370.64 (0.46%)**

- Equity benchmark indices extended their winning streak for the fourth straight session, with the Nifty closing just shy of the 25,000 mark and the Sensex reclaiming the 81,500 level amid broad-based buying across sectors. Positive sentiment was driven by expectations of GST reforms, signs of easing geopolitical tensions between Russia and Ukraine, renewed foreign institutional investor (FII) interest with inflows exceeding ₹500 crore yesterday, and S&P Global's upgrade of India's sovereign credit rating.
- Investor confidence received a further boost from global market gains, driven by optimism over potential progress in the Russia-Ukraine peace process. This was supported by diplomatic developments, including US President Donald Trump's meetings with Ukrainian President Volodymyr Zelensky, key European leaders, and earlier discussions with Russian President Vladimir Putin.
- On the domestic front, Prime Minister Narendra Modi's announcement of a major overhaul in the GST structure added to the market's bullish sentiment.
- The Sensex ended 371 points higher at 81,644, up 0.46%, while the Nifty gained 104 points to close at 24,980, rising 0.42%. The advance-decline ratio for Nifty 500 stocks stood at 3:1, indicating a shift in trader focus toward mid- and small-cap stocks.
- Sector-wise, indices such as Nifty FMCG, Auto, Metal, Oil & Gas, Mid-cap, and Small-cap posted gains of 1–2%. However, the Nifty Defence Index slipped 1% due to profit booking.

Technical Outlook:

- Nifty index opened positive and gradually escalated upwards and quickly established control above the psychological 25k marks. Price action reflected continuous buying interest and it closed with gains of around 100 points. It formed a bullish candle and an inside bar on the daily frame and continues to form higher lows from the last six sessions.
- Now it has to hold above 24850 zones for an up move towards 25100 then 25250 zones while supports can be seen at 24850 then 24750 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.28% at 25036 levels. Positive setup seen in Paytm, Tata Motors, TIINDIA , Bajaj Auto, Hero MotoCorp, L&T Finance, Reliance, PB Fintech, Dmart and Voltas while weakness in BDL, Kalyan Jewellers, Solar Industries, CAMS, HAL, Divis lab, Bajaj FinServ, Nuvama Wealth, KPIT Tech and BEL.
- On option front, Maximum Call OI is at 25000 then 25200 strike while Maximum Put OI is at 24900 then 25000 strike. Call writing is seen at 25000 then 25300 strike while Put writing is seen at 24900 then 25000 strike. Option data suggests a broader trading range in between 24500 to 25500 zones while an immediate range between 24700 to 25200 levels.

Today's News

- Coal India Signs MOU to Develop Rail Infrastructure – Company has entered into a non-binding memorandum of understanding with Konkan Railway Corporation.
- SPML Infra – Company secures Rs. 1,073 Crore order for Water Supply project under Amrut 2.0 for Indore City
- Reliance Infra – Company has secured a Letter of Award (LoA) from NHPC, a Public sector power company, for 390 MW inter state transmission system (ISTS) – connected solar power project coupled with Battery Energy Storage System (BESS).
- Alembic Pharmaceuticals – Company received the US Federal Reserve approval for Macitentan tablets, 10 miligram. These tablets are used for treatment for pulmonary arterial
- Coal India - Company has signed a memorandum of understanding with Konkan Railway Corp to develop the company's rail infrastructure
- Glenmark Pharma – Company announce that it has launched Micafungin for injection in September.
- Engineering India - ONGC signed an agreement with Engineers Indiato establish a Helium Recovery Demonstration Plant at Kuthalam in Tamil Nadu's Cauvery basin

Global Market Update

- European Market Update - European equities stalled as Donald Trump pushed for a summit between Ukraine and Russia after meeting with Volodymyr Zelenskiy and European leaders. Both Germany and France Index gain 0.3% each.
- Asian Market – Asian stocks were mixed Tuesday, as Australia led losses while mainland China shares eyed a third day of gains. A gauge of Chinese equities slightly extended gains after notching a record close Monday, and stocks also edged higher in Hong Kong.

Commodity - Oil rose as investors turned their attention to Donald Trump's meeting with Volodymyr Zelenskiy on Monday, with the Ukrainian leader facing US pressure to reach a peace deal with Russia that involves ceding territory. Brent traded near $66 a barrel.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	24,981	24,874	24,817	24,899	24,956	25,038	25,094	25,013
ADANIENT	2,381	2,314	2,282	2,331	2,363	2,413	2,445	2,396
ADANIPORTS	1,370	1,325	1,309	1,339	1,356	1,386	1,402	1,372
APOLLOHOSP	7,809	7,800	7,760	7,784	7,824	7,849	7,889	7,865
ASIANPAINT	2,581	2,561	2,545	2,563	2,579	2,597	2,613	2,595
AXISBANK	1,084	1,076	1,066	1,075	1,085	1,094	1,104	1,095
BAJAJ-AUTO	8,771	8,586	8,468	8,619	8,738	8,889	9,008	8,856
BAJAJFINSV	1,974	1,965	1,946	1,960	1,979	1,993	2,012	1,998
BAJFINANCE	902	891	881	892	901	911	920	910
BEL	381	378	374	377	381	384	387	384
BHARTIARTL	1,913	1,900	1,883	1,898	1,915	1,930	1,947	1,932
CIPLA	1,547	1,546	1,531	1,539	1,554	1,562	1,577	1,569
COALINDIA	386	384	382	384	386	388	390	389
DRREDDY	1,245	1,242	1,228	1,237	1,250	1,259	1,272	1,264
EICHERMOT	5,936	5,892	5,837	5,887	5,941	5,990	6,044	5,995
ETERNAL	321	312	308	315	318	325	328	322
GRASIM	2,830	2,803	2,778	2,804	2,829	2,855	2,880	2,854
HCLTECH	1,480	1,469	1,464	1,472	1,477	1,485	1,491	1,483
HDFCBANK	1,990	1,987	1,975	1,982	1,994	2,002	2,014	2,006
HDFCLIFE	794	785	781	787	792	798	803	796
HEROMOTOCO	5,117	4,984	4,925	5,021	5,080	5,176	5,235	5,139
HINDALCO	707	706	700	703	709	713	719	715
HINDUNILVR	2,604	2,558	2,536	2,570	2,592	2,627	2,649	2,615
ICICIBANK	1,437	1,426	1,422	1,429	1,434	1,442	1,446	1,439
INDUSINDBK	786	781	776	781	786	791	796	791

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INFY	1,443	1,433	1,425	1,434	1,442	1,450	1,458	1,449
ITC	409	405	403	406	408	411	413	409
JIOFIN	331	328	326	329	331	334	336	333
JSWSTEEL	1,074	1,071	1,060	1,067	1,078	1,084	1,095	1,088
KOTAKBANK	2,027	1,993	1,977	2,002	2,017	2,042	2,057	2,033
LT	3,618	3,608	3,581	3,599	3,627	3,645	3,673	3,654
M&M	3,357	3,338	3,301	3,329	3,366	3,395	3,432	3,404
MARUTI	14,235	13,979	13,870	14,053	14,161	14,344	14,452	14,270
NESTLEIND	1,165	1,130	1,117	1,141	1,154	1,179	1,192	1,168
NTPC	335	334	330	333	337	339	343	341
ONGC	238	237	236	237	238	239	240	239
POWERGRID	288	287	285	286	288	290	292	290
RELIANCE	1,421	1,389	1,378	1,400	1,410	1,432	1,442	1,421
SBILIFE	1,856	1,837	1,821	1,838	1,854	1,872	1,887	1,870
SBIN	829	826	823	826	829	832	834	831
SHRIRAMFIN	626	615	608	617	624	632	639	631
SUNPHARMA	1,638	1,619	1,613	1,625	1,632	1,644	1,651	1,638
TATACONSUM	1,091	1,069	1,061	1,076	1,084	1,100	1,108	1,093
TATAMOTORS	701	673	662	681	692	712	723	703
TATASTEEL	159	157	156	157	158	160	161	159
TCS	3,018	3,011	3,004	3,011	3,018	3,025	3,032	3,025
TECHM	1,500	1,464	1,453	1,476	1,488	1,511	1,523	1,500
TITAN	3,564	3,545	3,530	3,547	3,562	3,579	3,594	3,577
TRENT	5,493	5,465	5,410	5,451	5,506	5,548	5,603	5,562
ULTRACEMCO	12,850	12,629	12,535	12,693	12,786	12,944	13,037	12,880
WIPRO	247	245	244	245	246	248	249	248

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