



MOSt Market Roundup

Market Update

Nifty : 24,619.35 +131.95 (+0.54%)

Sensex : 80,539.91 +304.32 (+0.38%)

- Equity benchmark Sensex jumped over 300 points and Nifty reclaimed the 24,600 mark, supported by improved market sentiment after domestic July inflation eased to an 8-year low of 1.55% from 2.1% in the previous month—well below the RBI's 3.1% forecast—fueling expectations of a rate cut by the central bank.
- Globally, US markets surged over 1% overnight to fresh record highs after July inflation data came in softer than expected, boosting hopes of a US Fed rate cut. This optimism lifted Asian and European markets by 1–2% today.
- The Sensex closed 0.38% higher, up 304 points at 80,565, while the NSE Nifty rose 0.54% or 132 points to end at 24,619. Sector-wise, Nifty defense, pharma, metal, and auto indices gained between 1–3%, with defense stocks rallying after strong quarterly results from BDL, GRSE, and HAL. Nykaa surged 5.1% after reporting a twofold jump in profit, and Paytm climbed 3.1% following in-principle RBI approval for its payments arm to operate as an online payments aggregator. Broader markets also advanced, with the small-cap index up 0.7% and the mid-cap index gaining 0.6%.

Technical Outlook:

- Nifty index opened positive and moved in a range bound manner in the first half of the session. It respected its support of 24500 levels and witnessed buying on the second half of the day. It managed to cross 24650 zones but failed to surpass its previous day's high.
- It formed a small bodied bullish candle and an inside bar on the daily frame and closed with gains of around 130 points. Now it has to hold above 24500 zones then up move can be seen towards 24750 then 24900 zones while supports can be seen at 24442 then 24350 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.67% at 24719 levels. Positive setup seen in Apollo Hospital, Hindalco, Alkem, Zydus Life, Uno Minda, Indigo, Laurus Labs, Indian Hotel, M&M, and Supreme Industries while weakness in Oil India, SJVN, LICI, Inox Wind, PI Industries, Petronet, Colpal, Kalyan Jewellers, IndusInd Bank and Adani Ports.
- On option front, Maximum Call OI is at 24700 then 24800 strike while Maximum Put OI is at 24600 then 24500 strike. Call writing is seen at 24700 then 24650 strike while Put writing is seen at 24600 then 24500 strike. Option data suggests a broader trading range in between 24100 to 25100 zones while an immediate range between 24400 to 24800 levels.

Today's News

- **Aurionpro Solutions** - Company has received an order worth Rs250 from the Mumbai Metropolitan Region Development Authority.
- **Brigade Hotel Ventures** - Company signs multi-deal agreement with Marriott International to open six hotels in India.
- **Ola Electric likely to enter sports scooter segment** - Company is likely to announce its foray into the sports scooter segment on August 15 as part of its plans to expand its product portfolio, according to sources. The company plans to unveil the new range at its upcoming annual event on August 15.
- **Dilip Buildcon** - Company has provisionally completed Rs 1,228 crore road project in Tamil Nadu. It received provisional completion certificate for four laning project in Tamil Nadu and Puducherry.
- **Avanti Feeds Q1 FY26** - Net Profit Rs178.2cr (up 39% YoY), Revenue Rs1606cr (up 7% YoY), Ebitda Rs214.6cr (up 33.2% YoY) and Ebitda Margin 13.3% vs 10.7% YoY.
- **CSB Bank Q1** - NII Rs379cr (up 4.7% YoY), Net Profit Rs119cr (up 5.3% YoY), GNPA 1.84% vs. 1.57% (QoQ), Provisions Rs61cr (up 1% QoQ) and Operating profit Rs220cr (up 28% YoY).
- **FACT Q1** - FY26 announce good quarterly results. Net Profit Rs4.3cr vs Loss Rs48.7cr (YoY), Revenue Rs1024.8cr (up 74% YoY) and Ebitda Rs24cr vs Loss Rs56.6cr (YoY).
- **AIA Engineering** - Revenue up 1.9% (YoY) to Rs 1,039 crore, Ebitda up 6.1% (YoY) to Rs 306 crore, Ebitda Margin at 29.5% versus 28.3% (YoY) and Net Profit up 17.5% (YoY) to Rs 305 crore.

Global Market Update

- **European Market** - European stocks advanced, tracking US peers which closed at a record, as easing concerns about price pressures boosted bets on a Federal Reserve interest-rate cut in September. Both Germany and France Index advance 0.2% each.
- **Asian Market** - Asian equities advanced, with Hong and Japan helping to lead the charge, as bets on Federal Reserve rate cuts fueled investor appetite for risk assets. Hong Kong Index surged 2.6% after US President Trump has extended the trade truce with China by 90 days.
- **US Data** - Producer Price Index (PPI) and Mortgage Application.
- **Commodity** - Crude oil prices decline 1% to below \$66/bbl following the news that the U.S. will delay the imposition of tariffs on China by 90 days as negotiations continue and investors looking to talks between the US and Russian leaders on Friday for fresh impetus.

Pivot Table

13-Aug-25

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	24,619	24,535	24,477	24,548	24,606	24,678	24,736	24,665
ADANIENT	2,287	2,245	2,213	2,250	2,282	2,319	2,352	2,315
ADANIPORTS	1,321	1,317	1,303	1,312	1,326	1,335	1,348	1,339
APOLLOHOSP	7,830	7,389	7,235	7,533	7,686	7,984	8,137	7,840
ASIANPAINT	2,501	2,461	2,446	2,473	2,489	2,517	2,532	2,504
AXISBANK	1,067	1,063	1,058	1,062	1,068	1,072	1,077	1,073
BAJAJ-AUTO	8,250	8,189	8,129	8,190	8,250	8,310	8,370	8,310
BAJAJFINSV	1,917	1,893	1,883	1,900	1,910	1,927	1,937	1,920
BAJFINANCE	863	849	844	853	859	868	874	864
BEL	389	382	379	384	387	392	395	390
BHARTIARTL	1,871	1,852	1,844	1,858	1,865	1,878	1,886	1,873
CIPLA	1,560	1,520	1,502	1,531	1,549	1,578	1,597	1,568
COALINDIA	386	385	384	385	386	388	389	388
DRREDDY	1,253	1,220	1,207	1,230	1,243	1,266	1,279	1,256
EICHERMOT	5,710	5,649	5,596	5,653	5,705	5,762	5,814	5,758
ETERNAL	313	306	302	308	311	316	319	314
GRASIM	2,743	2,726	2,704	2,724	2,745	2,764	2,785	2,766
HCLTECH	1,499	1,489	1,480	1,489	1,498	1,508	1,517	1,508
HDFCBANK	1,980	1,969	1,956	1,968	1,981	1,993	2,006	1,994
HDFCLIFE	778	764	755	767	775	787	795	784
HEROMOTOCO	4,755	4,650	4,589	4,672	4,733	4,815	4,876	4,794
HINDALCO	701	671	658	680	692	714	726	705
HINDUNILVR	2,493	2,473	2,461	2,477	2,489	2,505	2,518	2,502
ICICIBANK	1,422	1,415	1,409	1,415	1,422	1,428	1,434	1,428
INDUSINDBK	773	767	755	764	776	785	797	788

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INFY	1,426	1,422	1,416	1,421	1,428	1,433	1,439	1,434
ITC	414	414	411	413	415	417	419	418
JIOFIN	331	329	327	329	331	333	335	333
JSWSTEEL	1,055	1,050	1,046	1,050	1,055	1,060	1,064	1,060
KOTAKBANK	1,989	1,962	1,948	1,969	1,982	2,003	2,017	1,996
LT	3,692	3,681	3,662	3,677	3,696	3,712	3,731	3,716
M&M	3,294	3,239	3,216	3,255	3,278	3,316	3,339	3,300
MARUTI	12,839	12,752	12,666	12,752	12,839	12,925	13,012	12,925
NESTLEIND	1,100	1,087	1,081	1,090	1,096	1,105	1,110	1,101
NTPC	340	339	337	338	341	342	345	343
ONGC	239	236	235	237	238	240	242	240
POWERGRID	289	286	285	287	288	290	291	289
RELIANCE	1,384	1,378	1,370	1,377	1,384	1,391	1,399	1,392
SBILIFE	1,846	1,838	1,827	1,836	1,848	1,857	1,869	1,859
SBIN	822	821	818	820	822	824	827	825
SHIRIRAMFIN	620	610	606	613	617	624	628	621
SUNPHARMA	1,641	1,617	1,608	1,624	1,634	1,651	1,660	1,644
TATACONSUM	1,058	1,043	1,038	1,048	1,053	1,063	1,069	1,059
TATAMOTORS	663	657	652	658	662	668	673	667
TATASTEEL	160	160	158	159	161	162	163	162
TCS	3,035	3,029	3,020	3,028	3,036	3,043	3,052	3,044
TECHM	1,504	1,499	1,488	1,496	1,507	1,515	1,527	1,519
TITAN	3,472	3,463	3,445	3,458	3,477	3,490	3,508	3,495
TRENT	5,400	5,360	5,317	5,358	5,402	5,443	5,487	5,445
ULTRACEMCO	12,411	12,388	12,310	12,360	12,439	12,489	12,568	12,517
WIPRO	242	240	239	240	242	243	244	243

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