



MOSt Market Roundup



Market Update

Nifty : 25,285.35 +103.55 (+0.41%)

Sensex : 82,500.82 +328.72 (+0.40%)

- Equity benchmark Nifty closed near the 25,300 mark, while the Sensex advanced over 300 points, driven by renewed foreign portfolio investor (FPI) inflows over the past three sessions and stronger-than-expected quarterly results from TCS. Market sentiment was further supported by optimism surrounding the ongoing UK-India FTA talks, robust corporate business updates, and positive domestic macroeconomic indicators.
- The Nifty rose 103 points, or 0.4%, to close at 25,285, while the Sensex gained 328 points, or 0.4%, to settle at 82,500. Sectorally, PSU banks, realty, and pharma led the gains, rising up to 2%, while the Nifty Metal index declined 1% on account of profit booking.
- Pharma stocks rallied after the Trump administration clarified it would not impose tariffs on imported generic drugs. Additional sentiment boost came as the U.S. Senate approved a measure restricting Chinese access to U.S. biotech manufacturing and development. Divi's Labs surged 5% to ₹6,474, while Cipla, Piramal Pharma, and Dr. Reddy's gained between 2% and 4%.
- PSU banking stocks saw a strong upmove after reports that the government will allow private-sector professionals to apply for senior leadership roles, including the Managing Director position, in public sector banks. PNB, Bank of Baroda, Bank of India, UCO Bank, and SBI rose between 2% and 4%.
- Realty stocks also advanced, with Godrej Properties, Phoenix Mills, Lodha, and Brigade Enterprises gaining up to 3%.
- In global markets, U.S. indices slipped nearly 1% overnight, while Asian and European markets traded mixed amid profit booking and cautious remarks from U.S. Federal Reserve officials regarding the pace of potential rate cuts.

Technical Outlook:

- Nifty index opened flattish and witnessed a spurt in the first half of the session. It faced some consolidation for the rest of the session but managed to touch an intraday high of 25330 zones. It maintained a bullish undertone throughout the session and respected the base of 25150 zones.
- It formed a bullish candle won daily frame and closed with gains of around 100 points. It formed a strong bullish candle on the weekly frame and closed near its higher band. Now it has to hold above 252200 zones for an up move towards 25450 then 25600 zones while supports can be seen at 25150 then 25000 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.56% at 25415 levels. Positive setup seen in PG Electroplast, Divis Lab, Cipla, CDSL, BSE, INOX Wind, Syngene, Dixon, DLF and PNB while weakness in UNO Minda, Jindal steel, ICICI GI, Naukri, RVNL, Siemens, KPIT Tech, HDFC Life and Tata Motors.
- On option front, Maximum Call OI is at 25400 then 25500 strike while Maximum Put OI is at 25200 then 25300 strike. Call writing is seen at 25450 then 25300 strike while Put writing is seen at 25300 then 25250 strike. Option data suggests a broader trading range in between 24800 to 25800 zones while an immediate range between 25100 to 25500 levels.

Today's News

- **TCS Says It Will Create 5,000 New Jobs in UK Over Next 3 Years** - Company will create 5,000 new jobs across the UK over the next three years - company said. Company launched an AI experience zone and design studio in London.
- **KPI Green Energy** - Company secured category A power trading Licence from Gujarat Electricity Regulatory. Company signs MoU with Government Of Gujarat to develop hydrogen and EV Fuel Stations. Company KPI Green Energy Arm Gets Letter of Intent to Develop 100 MW Solar Power Projects.
- **Goodluck India plans for Capacity Expansion** - Defence and Aerospace, a subsidiary of Goodluck India has earmarked an investment of Rs500cr for the expansion of its capacity within one year. The company plans to expand its production capacity to manufacture empty shells from 150,000 units to 400,000 units.
- **Capacite Infra** - Company has secured a prestigious order worth Rs 542.37 crore from the Indian Institute of Technology (IIT) Bombay.
- The SIP contribution rose to Rs 29,361 crore in September, as compared to Rs 28,265 crore in August 2025.
- **Puravankara Q2 business update** - The company's Q2 pre-sales reached Rs 1,322 crore. This marks a 4% increase year-over-year (YoY). For the first half (H1) of FY26, pre-sales stood at Rs 2,445 crore. This also reflects a 4% growth compared to the previous year. Q2 collections from the real estate business were strong. Collections grew 8% YoY to Rs 1,047 crore. H1 collections from the real estate business totaled Rs 1,904 crore. This represents a 1% increase YoY.

Global Market Update

- **Asian Market** - Asian stocks slid, putting the regional benchmark on track for a weekly loss, with Japanese equities leading the declines amid concerns over high valuations in the tech sector. Japan, Hong Kong and China Index declined up to 2.5%.
- **European Market** - European stocks were steady on Thursday after closing at a record in the previous session, as investors focused on further developments in France's political crisis. Mining as well as travel and leisure sectors outperformed, while autos and bank shares were among the biggest laggards.
- **US Data** - US of Mich 1 year and 5-Year Inflation.
- **Commodity** - Oil prices decline 1% to below \$65/bbl on account of reduce geo-political tension in the gulf region after Israel approved the U.S.-brokered deal for a cease-fire and hostage release in Gaza.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,285	25,157	25,084	25,185	25,258	25,358	25,432	25,331
ADANIENT	2,542	2,539	2,522	2,532	2,549	2,558	2,575	2,565
ADANIPORTS	1,411	1,396	1,386	1,399	1,408	1,421	1,431	1,418
APOLLOHOSP	7,690	7,660	7,617	7,654	7,696	7,733	7,775	7,739
ASIANPAINT	2,339	2,337	2,323	2,331	2,344	2,352	2,366	2,358
AXISBANK	1,183	1,165	1,153	1,168	1,180	1,194	1,206	1,192
BAJAJ-AUTO	8,943	8,782	8,720	8,831	8,893	9,005	9,067	8,955
BAJAJFINSV	2,009	2,001	1,987	1,998	2,012	2,023	2,037	2,026
BAJFINANCE	1,025	1,017	1,013	1,019	1,023	1,029	1,034	1,028
BEL	412	408	405	409	412	416	419	416
BHARTIARTL	1,940	1,935	1,929	1,934	1,941	1,947	1,953	1,948
CIPLA	1,568	1,507	1,486	1,527	1,548	1,589	1,610	1,569
COALINDIA	384	383	381	382	385	386	388	387
DRREDDY	1,264	1,245	1,236	1,250	1,259	1,273	1,282	1,268
EICHERMOT	6,974	6,877	6,837	6,906	6,945	7,013	7,052	6,984
ETERNAL	348	342	338	343	347	352	355	350
GRASIM	2,812	2,788	2,767	2,789	2,811	2,834	2,856	2,833
HCLTECH	1,493	1,474	1,464	1,478	1,488	1,503	1,513	1,499
HDFCBANK	981	978	974	978	982	986	990	986
HDFCLIFE	749	744	735	742	751	758	767	760
HINDALCO	773	764	760	766	771	778	782	776
HINDUNILVR	2,526	2,507	2,494	2,510	2,522	2,538	2,551	2,535
ICICIBANK	1,380	1,370	1,364	1,372	1,379	1,387	1,393	1,385
INDIGO	5,736	5,706	5,673	5,705	5,737	5,769	5,801	5,770
INFY	1,512	1,499	1,488	1,500	1,511	1,523	1,534	1,522

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	403	400	398	400	402	404	406	404
JIOFIN	308	307	305	306	308	310	312	310
JSWSTEEL	1,168	1,156	1,148	1,158	1,166	1,176	1,185	1,175
KOTAKBANK	2,146	2,137	2,126	2,136	2,147	2,157	2,168	2,158
LT	3,779	3,760	3,740	3,760	3,779	3,799	3,818	3,799
M&M	3,454	3,396	3,363	3,409	3,441	3,487	3,519	3,474
MARUTI	16,285	15,911	15,766	16,026	16,170	16,430	16,574	16,315
MAXHEALTH	1,156	1,139	1,129	1,142	1,153	1,166	1,176	1,163
NESTLEIND	1,199	1,184	1,178	1,188	1,195	1,206	1,213	1,202
NTPC	339	336	333	336	339	342	345	342
ONGC	246	244	242	244	246	247	249	247
POWERGRID	289	285	282	286	288	292	294	291
RELIANCE	1,381	1,375	1,368	1,375	1,381	1,388	1,394	1,388
SBILIFE	1,808	1,806	1,782	1,795	1,819	1,832	1,857	1,844
SBIN	881	861	853	867	875	890	898	884
SHIRIRAMFIN	665	663	658	662	666	670	675	671
SUNPHARMA	1,670	1,649	1,638	1,654	1,665	1,681	1,693	1,677
TATACONSUM	1,125	1,108	1,099	1,112	1,122	1,135	1,145	1,131
TATAMOTORS	679	667	657	668	678	690	700	689
TATASTEEL	174	173	171	172	174	176	178	176
TCS	3,028	3,007	2,972	3,000	3,035	3,063	3,098	3,070
TECHM	1,458	1,450	1,434	1,446	1,462	1,474	1,490	1,478
TITAN	3,529	3,523	3,493	3,511	3,541	3,559	3,590	3,572
TRENT	4,680	4,652	4,610	4,645	4,687	4,723	4,765	4,730
ULTRACEMCO	12,275	12,111	12,024	12,149	12,237	12,362	12,450	12,324
WIPRO	249	246	244	246	249	251	254	251

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