

# MOST Market Roundup



# Market Update

**Nifty : 25,145.50 -81.85 (-0.32%)**

**Sensex : 82,029.98 -297.07 (-0.36%)**

- Equity benchmark Nifty fell sharply from its intraday high amid a highly volatile session, as escalating U.S.-China trade tensions weighed on investor sentiment. The index dropped 165 points, or 0.6%, from its day's high of 25,310, before closing 80 points, or 0.3%, lower at 25,145.
- Global cues were weak, with U.S. index futures and major Asian and European markets slipping up to 2% after China threatened additional retaliatory measures against U.S. restrictions on its shipping sector. Despite domestic inflation easing to an eight-year low and strong quarterly results from HCL Tech, traders resorted to profit booking amid renewed global trade worries.
- Most sectors, including auto, metal, IT, financial, and defence, witnessed declines from intraday highs due to profit taking. Among individual stocks, Anand Rathi Global rallied 8% to ₹3,163 following robust quarterly results, while MCX, MapmyIndia, and Sona Comstar gained between 4% and 7%.

## Technical Outlook:

- Nifty index opened positive and after crossing 25300 zones in the initial tick, it failed to hold at higher zones and slipped lower for most part of the day. It gave up the gains of the previous two sessions and fell near 25050 zones. It witnessed some recovery towards the end and finally closed near 25150 zones after a roller coaster day of tug of war between the bulls and bears.
- It formed a bearish candle with longer lower shadow on daily frame which indicates buying is intact at support levels despite the profit booking at higher zones. Now it has to hold above 25050 zones for an up move towards 25350 then 25450 zones while supports can be seen at 25050 then 24900 zones.

## Derivative Outlook:

- Nifty future closed negative with losses of 0.49% at 25185 levels. Positive setup seen in MCX, Sona coms , IREDA, Wipro, Max Healthcare, Samman Capital, KEI Industries, Federal Bank, Laurus lab and TVS Motors while weakness in Dixon Tech, Bandhan Bank, Dmart, Uno Minda, OFSS, Indus Tower, GAIL, IGL, SAIL and Havells.
- On option front, Maximum Call OI is at 25200 then 25500 strike while Maximum Put OI is at 25200 then 25000 strike. Call writing is seen at 25200 then 25300 strike while Put writing is seen at 25200 then 25100 strike. Option data suggests a broader trading range in between 24700 to 25700 zones while an immediate range between 24900 to 25400 levels.

# Today's News

- **Prestige Estates launches new residential project in Mumbai** - Company has launched a new residential development named "Prestige Garden Trails" at Western Express Highway in Mumbai. The project offers a total carpet area of around 1 million square feet, including 1,324 residential units, with a gross development value of approximately Rs2000cr.
- **Adani ties up with MTAR Technologies for Amca stealth jet race** - Adani Defence, part of the Adani group, has tied up with MTAR Technologies to vie for the Rs15,000 crore contract to develop and build the prototype of India's first stealth fighter jet, the Advanced Medium Combat Aircraft (Amca), sources told Business Standard.
- **Bharti Airtel** - Airtel and Google will jointly establish the purpose-built data center in Visakhapatnam, as well as a state-of-the-art Cable Landing Station (CLS) to host Google's new international subsea cables that will join its extensive global terrestrial and subsea infrastructure.
- **SBI plans ₹7,500 crore 10-year tier-II bond sale — first bank issuance of FY26** - Company is set to issue what could be the first domestic bank bond of the current financial year. Two people familiar with the matter told Mint that the bank plans to tap the debt market this week with 10-year tier-II bonds.
- **Adani and Google Partner to Build India's Largest Data Centre Campus worth \$15bn** - Adani Enterprises and Google have partnered to invest USD 15 billion in India's largest AI data centre in Visakhapatnam. This initiative aims to enhance AI capabilities and promote sustainability through clean energy infrastructure.
- **Seamec** - Company entered Bimco Charter Party with Hindustan Aeronautics Ltd. offshore for to hire HAL Vessel for Rs 6.3 crore for 45 days.

## Global Market Update

- **Asian Market** - Asian stocks slipped on Tuesday, hurt by broad worries over US-China trade frictions as well as losses in Japan, where political uncertainty dragged shares lower after a long weekend. Both Japan and Hong Kong Index declined 2.6% and 2% respectively.
- **European Market** - European stocks fell as China has threatened further retaliatory measures against US curbs on its shipping sector. Ericsson AB soared after the Swedish telecom equipment maker reported robust earnings. UK, Germany and France Index decline 1% each.
- **US Data** - Small Business Optimism.
- **Commodity** - Oil price fell 1% to below \$63/bbl as rising China-US tensions hurt appetite for risk assets, and traders awaited a market outlook from the International Energy Agency that may reinforce expectations for a surplus.

# Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,146	25,061	24,922	25,034	25,172	25,284	25,422	25,310
ADANIENT	2,519	2,485	2,461	2,490	2,514	2,544	2,568	2,539
ADANIPTS	1,425	1,422	1,410	1,417	1,430	1,437	1,450	1,442
APOLLOHOSP	7,752	7,675	7,585	7,669	7,759	7,842	7,932	7,849
ASIANPAINT	2,314	2,308	2,279	2,296	2,326	2,343	2,373	2,355
AXISBANK	1,174	1,167	1,152	1,163	1,177	1,188	1,203	1,192
BAJAJ-AUTO	9,101	9,033	8,997	9,049	9,085	9,137	9,172	9,120
BAJAJFINSV	2,020	2,007	1,991	2,005	2,021	2,036	2,051	2,037
BAJFINANCE	1,017	1,011	993	1,005	1,023	1,036	1,054	1,042
BEL	402	402	393	398	406	410	419	414
BHARTIARTL	1,948	1,939	1,926	1,937	1,950	1,962	1,975	1,964
CIPLA	1,548	1,537	1,522	1,535	1,551	1,564	1,580	1,566
COALINDIA	380	380	377	379	382	384	387	385
DRREDDY	1,235	1,232	1,213	1,224	1,243	1,254	1,273	1,262
EICHERMOT	6,873	6,815	6,750	6,811	6,877	6,938	7,004	6,942
ETERNAL	347	343	338	343	347	352	356	352
GRASIM	2,777	2,758	2,731	2,754	2,781	2,804	2,831	2,808
HCLTECH	1,492	1,490	1,461	1,476	1,506	1,521	1,551	1,535
HDFCBANK	976	967	961	969	975	982	988	980
HDFCLIFE	744	740	735	739	744	748	752	748
HINDALCO	758	754	738	748	765	775	792	782
HINDUNILVR	2,502	2,482	2,471	2,486	2,498	2,513	2,525	2,509
ICICIBANK	1,385	1,375	1,369	1,377	1,383	1,391	1,397	1,389
INDIGO	5,767	5,741	5,710	5,739	5,769	5,798	5,828	5,800
INFY	1,488	1,487	1,468	1,478	1,496	1,506	1,524	1,514

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	397	396	393	395	398	400	403	401
JIOFIN	306	305	301	303	307	309	313	311
JSWSTEEL	1,147	1,139	1,122	1,134	1,152	1,165	1,182	1,170
KOTAKBANK	2,150	2,142	2,129	2,139	2,152	2,163	2,176	2,165
LT	3,736	3,730	3,694	3,715	3,751	3,772	3,808	3,787
M&M	3,453	3,428	3,397	3,425	3,456	3,484	3,515	3,487
MARUTI	16,300	16,121	16,028	16,164	16,257	16,393	16,486	16,350
MAXHEALTH	1,160	1,142	1,132	1,146	1,155	1,169	1,179	1,165
NESTLEIND	1,176	1,171	1,157	1,166	1,180	1,190	1,204	1,194
NTPC	337	335	331	334	338	342	346	343
ONGC	244	244	241	242	246	247	250	249
POWERGRID	287	285	284	286	287	288	289	288
RELIANCE	1,375	1,370	1,360	1,367	1,378	1,385	1,396	1,388
SBILIFE	1,815	1,808	1,798	1,806	1,816	1,825	1,834	1,826
SBIN	876	872	865	871	877	883	889	884
SHRIRAMFIN	674	667	660	667	674	681	688	681
SUNPHARMA	1,652	1,646	1,632	1,642	1,656	1,666	1,680	1,670
TATACONSUM	1,113	1,111	1,102	1,108	1,116	1,122	1,130	1,125
TATAMOTORS	395	376	352	374	398	419	443	422
TATASTEEL	169	169	164	167	172	174	179	176
TCS	2,960	2,956	2,909	2,935	2,981	3,006	3,053	3,027
TECHM	1,469	1,458	1,447	1,458	1,469	1,480	1,491	1,480
TITAN	3,528	3,507	3,485	3,507	3,528	3,549	3,571	3,549
TRENT	4,604	4,599	4,533	4,568	4,634	4,670	4,736	4,700
ULTRACEMCO	12,074	12,026	11,892	11,983	12,117	12,208	12,342	12,251
WIPRO	248	245	243	245	248	250	253	250



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