

MOST Market Roundup



Market Update

Nifty : 25,585.30 +261.75 (+1.03%) Sensex : 83,467.66 +862.23 (+1.04%)

- Blue-chip stocks saw renewed buying interest today, propelling a strong rally in the equity markets. Heavyweights such as Nestle India, Tata Consumer, Kotak Bank, Titan, Axis Bank, Reliance Industries, Hindustan Unilever, Hindalco, and HDFC Bank led the uptrend, helping the Sensex surge nearly 900 points and the Nifty climb 1% to close at a three-month high above the 25,600 level.
- Market sentiment was buoyed by better-than-expected quarterly results from Nestle India and fresh foreign capital inflows, which supported the rally. Further optimism stemmed from eight-year-low inflation, strong corporate earnings, robust auto sales numbers, expectations of an RBI rate cut, and progress on GST reforms, all of which contributed to the positive outlook.
- Global cues also remained supportive, with markets witnessing a sharp rebound on hopes that the U.S. Federal Reserve may cut interest rates soon. The Nifty advanced 261 points (1%) to close at 25,585, while the Sensex gained 862 points (1%) to end at 83,467.
- The day's momentum was concentrated in large-cap stocks, while mid- and small-cap segments lagged behind. Among sectors, the Nifty FMCG and Nifty Realty indices were the top performers, each rising 2%, while the Nifty Auto index advanced 1%, led by M&M, Bajaj Auto, and Tata Motors.
- Nestle India jumped 4.5% to ₹1,276 after reporting strong Q2 results. Other FMCG majors — Britannia, Tata Consumer, Godrej Consumer, Colgate, and Hindustan Unilever — gained between 1.5% and 4%. Expectations of an RBI rate cut and impressive Q2 results from Oberoi Realty further lifted the Nifty Realty index.

Technical Outlook:

- Nifty index opened gap up by 70 points and escalated right from the start of the session. It moved in a clean northward direction displaying strong momentum. It crossed the high that it had made 72 sessions back and went on to touch 25625 marks towards the end. Bulls remained in control with defending seen at any dips and it finally closed with gains of around 260 points and gave the highest daily close of the last 75 sessions.
- It formed a big bullish candle on daily frame and has been making higher highs from the last three sessions. Now it has to hold above 25500 zones for an up move towards 25700 then 25850 zones while supports have shifted higher to 25450 then 25350 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.88% at 25648 levels. Positive setup seen in Oberoi Realty, Nestle India, Sona Coms, Bharat Forge, Godrej Properties, Titan, Samvardhana Motherson, Tata Consumer, Kotak Bank and United Spirits while weakness in KEI Industries, Max Financial, Delhivery, HDFC Life, Glenmark, Inox Wind, IREDA, NMDC, PFC and LIC.
- On option front, Maximum Call OI is at 26000 then 25800 strike while Maximum Put OI is at 25500 then 25400 strike. Call writing is seen at 25800 then 25650 strike while Put writing is seen at 25500 then 25600 strike. Option data suggests a broader trading range in between 25100 to 26000 zones while an immediate range between 25400 to 25800 levels.

Today's News

- **Ola Electric Launches Residential Battery Energy Storage System** - Company launched Ola Shakti, its first residential battery energy storage system solution.
- **BLS International** - Company wins prestigious 3 Year Contract from Ministry of External Affairs, India to establish and operate Indian Visa Application Centres in China' - stock is up 2%.
- **Signatureglobal** (India) has raised Rs875cr through the allotment of non-convertible debentures on a private placement basis.
- **Parsvnath Developers** - Company has opened a new shopping mall, named Unity One Elegante in Delhi, India, in a joint venture with Unity Group. The mall is developed on a 28,400-square-meter land area and has a total leasable super built-up area of 489,530 square feet, which has almost been leased out entirely.
- **EMS** - Company received letter of award worth Rs 184 crore from UP Jal Nigam for sewage treatment scheme.
- **PNC Infratech** - Company won order worth Rs297.01 crores project from the Airports Authority of India.
- **SBI sanctions Rs 1,230 crore loan to HEG arm for lithium-ion battery** -Company has got the approval from State Bank of India for Rs 1,230 crore loan. Loan will be used to partly fund a new project — the setting up of a greenfield manufacturing plant in Dewas, Madhya Pradesh, to produce 20,000 metric tonnes per annum (MTPA) of lithium-ion battery-grade.
- **South Indian Bank announced stable Q2 FY26 results** - Net Profit Rs351cr (up 8.2%YoY), NII Rs809cr (down 8.3% YoY), Operating Profit Rs536cr (down down 2.5% YoY), Provisional Rs63.27cr (down 74% QoQ). Gross NPA 2.93% vs 3.15% QoQ and Net NPA 0.56% vs 0.68% QoQ.

Global Market Update

- **Asian Market** - Asian stocks advanced, led by South Korea as investors bet on improved prospects for a tariff deal with the US. Both Japan and Australia Index gained 1% each while Hong Kong Index ended flat.
- **European market** - European stocks were muted as investors parsed through the latest earnings and awaited the result of no-confidence votes in France. Nestle SA jumped 7% as Chief Executive Officer Philipp Navratil sped up turnaround efforts.
- **US Data** - Initial Jobless Claims and Retail Sales.
- **Commodity** - Crude oil prices jumped 1% to above \$63/bbl after U.S. President Donald Trump said India would halt oil purchases from Russia, which could affect global supply dynamics.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,585	25,377	25,281	25,433	25,529	25,682	25,778	25,625
ADANIENT	2,555	2,541	2,520	2,537	2,558	2,576	2,597	2,580
ADANIPTS	1,477	1,453	1,436	1,457	1,474	1,494	1,511	1,491
APOLLOHOSP	7,835	7,808	7,775	7,805	7,838	7,868	7,900	7,870
ASIANPAINT	2,409	2,367	2,345	2,377	2,399	2,431	2,453	2,421
AXISBANK	1,196	1,185	1,168	1,182	1,199	1,213	1,231	1,217
BAJAJ-AUTO	9,145	9,022	8,960	9,052	9,115	9,207	9,270	9,177
BAJAJFINSV	2,088	2,078	2,067	2,077	2,089	2,099	2,111	2,100
BAJFINANCE	1,066	1,059	1,046	1,056	1,068	1,078	1,091	1,081
BEL	412	409	408	410	411	413	415	413
BHARTIARTL	1,970	1,962	1,948	1,959	1,973	1,984	1,998	1,987
CIPLA	1,570	1,555	1,549	1,559	1,566	1,576	1,583	1,572
COALINDIA	388	385	383	386	387	389	390	388
DRREDDY	1,240	1,230	1,225	1,233	1,238	1,245	1,250	1,243
EICHERMOT	6,989	6,892	6,841	6,915	6,966	7,040	7,090	7,017
ETERNAL	341	338	319	330	349	360	379	368
GRASIM	2,858	2,817	2,792	2,825	2,850	2,883	2,908	2,875
HCLTECH	1,514	1,498	1,489	1,502	1,511	1,523	1,533	1,520
HDFCBANK	994	982	975	985	991	1,000	1,006	997
HDFCLIFE	743	726	709	726	743	760	777	760
HINDALCO	780	764	757	769	775	786	792	781
HINDUNILVR	2,560	2,507	2,484	2,522	2,545	2,583	2,607	2,569
ICICIBANK	1,417	1,399	1,392	1,405	1,412	1,424	1,431	1,419
INDIGO	5,871	5,853	5,814	5,842	5,882	5,910	5,950	5,921
INFY	1,471	1,461	1,455	1,463	1,469	1,477	1,483	1,475

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	405	400	397	401	404	408	410	406
JIOFIN	312	311	309	310	312	314	316	314
JSWSTEEL	1,173	1,159	1,153	1,163	1,168	1,178	1,183	1,174
KOTAKBANK	2,195	2,152	2,125	2,160	2,187	2,222	2,250	2,215
LT	3,862	3,830	3,803	3,833	3,859	3,889	3,915	3,886
M&M	3,564	3,498	3,470	3,517	3,545	3,592	3,620	3,573
MARUTI	16,295	16,200	16,144	16,219	16,276	16,351	16,408	16,332
MAXHEALTH	1,175	1,159	1,152	1,164	1,170	1,182	1,189	1,177
NESTLEIND	1,280	1,217	1,191	1,235	1,261	1,305	1,331	1,287
NTPC	341	340	338	340	341	343	344	343
ONGC	249	246	245	247	248	250	250	249
POWERGRID	292	291	289	291	292	293	295	293
RELIANCE	1,399	1,375	1,366	1,382	1,391	1,408	1,417	1,401
SBILIFE	1,842	1,810	1,797	1,819	1,832	1,855	1,868	1,845
SBIN	886	882	877	882	887	891	896	892
SHRIRAMFIN	674	662	652	663	673	684	695	684
SUNPHARMA	1,656	1,643	1,634	1,645	1,654	1,665	1,674	1,663
TATACONSUM	1,149	1,109	1,092	1,120	1,137	1,166	1,183	1,154
TATAMOTORS	396	390	385	390	395	401	406	400
TATASTEEL	174	172	171	172	173	175	176	174
TCS	2,972	2,943	2,931	2,952	2,963	2,984	2,995	2,975
TECHM	1,460	1,448	1,439	1,450	1,458	1,469	1,477	1,467
TITAN	3,636	3,540	3,497	3,567	3,609	3,679	3,721	3,652
TRENT	4,780	4,728	4,691	4,736	4,772	4,816	4,853	4,809
ULTRACEMCO	12,360	12,268	12,207	12,284	12,344	12,421	12,481	12,405
WIPRO	254	249	247	250	252	256	257	254

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