

MOST Market Roundup



Market Update

Nifty : 25,509.70 -87.95 (-0.34%) Sensex : 83,311.01 -148.14 (-0.18%)

- Equity benchmark Nifty extended its losing streak, slipping nearly 100 points to hit a one-month low around the 25,500 mark amid profit booking and persistent FII selling concerns. The selling pressure was more pronounced in the Midcap and Smallcap segments, reflected in a weak advance-decline ratio of 1:4 for Nifty 500 stocks. Nifty dropped 88 points or 0.35% to end at 25,509, while Sensex declined 148 points or 0.2% to close at 83,311.
- Nifty Metal, Realty, and Defense indices witnessed profit booking of up to 2%, selective IT stocks saw renewed buying interest driven by bargain hunting, which helped limit broader losses. Globally, U.S. markets gained over 0.5% overnight, and Asian peers advanced 1–2%, led by strength in technology stocks. However, sentiment remained cautious amid uncertainties surrounding the U.S.-India trade negotiations and a mixed set of Q2 earnings. Delhivery tumbled 8.7% to ₹442 following disappointing quarterly results.

Technical Outlook:

- Nifty index opened flattish and displayed notable bearish momentum throughout the session, reflecting a lack of buying appetite and sunk below 25500 zones. It formed a bearish candle on daily frame with longer upper shadow which signals pressure at any bounces.
- It closed near its lower band with losses of around 90 points and continues to form lower highs – lower lows from the last five sessions. Now till it holds below 25650, weakness could be seen towards 25350 then 25200 zones while resistances have shifted lower to 25700 then 25800 zones.

Derivative Outlook:

- Nifty future closed negative with losses of 0.28% at 25637 levels. Positive setup seen in Astral, Asian Paints, Paytm, Indus Tower, Ashok Leyland, Biocon, Dabur, Reliance, UPL and M & M while weakness in Delhivery, Grasim, Indian Hotel, Voltas, Adani Enterprise, Voltas, PGEL, PB Fintech, Godrej Properties and Power Grid.
- On option front, Maximum Call OI is at 26000 then 25700 strike while Maximum Put OI is at 25500 then 25200 strike. Call writing is seen at 25600 then 25700 strike while Put writing is seen at 25500 then 25550 strike. Option data suggests a broader trading range in between 25000 to 26000 zones while an immediate range between 25200 to 25700 levels.

Today's News

- **Axiscades Tech** - Company signs pact with France's Electronic Bird Control to bring E-Raptor drone to Indian market.
- **Zydus Life** - Company gets FDA orphan drug designation for Desidustat.
- **Ola Electric** - Company plans to scale Gigafactory to 5.9GWH by March.
- **KPI Green Energy** - Company signs power purchase pact with GUVNL for 150MW at 3.64/unit.
- **SBIN** - Company India plans to sell a 6.3% stake in its mutual fund arm through an initial public offering.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,510	25,492	25,373	25,441	25,560	25,629	25,748	25,679
ADANIENT	2,311	2,308	2,229	2,270	2,349	2,390	2,468	2,427
ADANIPTS	1,436	1,434	1,413	1,425	1,445	1,457	1,477	1,466
APOLLOHOSP	7,783	7,700	7,627	7,705	7,778	7,856	7,928	7,851
ASIANPAINT	2,602	2,560	2,527	2,564	2,598	2,635	2,669	2,631
AXISBANK	1,228	1,225	1,216	1,222	1,231	1,237	1,245	1,240
BAJAJ-AUTO	8,713	8,703	8,627	8,670	8,745	8,788	8,863	8,821
BAJAJFINSV	2,066	2,057	2,045	2,055	2,068	2,078	2,091	2,080
BAJFINANCE	1,043	1,035	1,026	1,034	1,043	1,052	1,061	1,053
BEL	409	407	403	406	410	413	418	415
BHARTIARTL	2,095	2,081	2,057	2,076	2,100	2,119	2,142	2,123
CIPLA	1,503	1,498	1,490	1,496	1,505	1,511	1,520	1,513
COALINDIA	373	372	368	371	375	377	381	379
DRREDDY	1,204	1,193	1,183	1,194	1,204	1,214	1,224	1,214
EICHERMOT	6,810	6,794	6,678	6,744	6,860	6,926	7,041	6,975
ETERNAL	305	304	299	302	307	310	315	312
GRASIM	2,697	2,692	2,622	2,659	2,730	2,767	2,838	2,800
HCLTECH	1,527	1,514	1,507	1,517	1,524	1,535	1,542	1,532
HDFCBANK	988	974	967	977	984	994	1,001	991
HDFCLIFE	736	735	727	731	739	744	751	747
HINDALCO	787	770	759	773	784	798	809	795
HINDUNILVR	2,439	2,433	2,414	2,426	2,445	2,458	2,476	2,464
ICICIBANK	1,320	1,317	1,302	1,311	1,327	1,336	1,351	1,342
INDIGO	5,684	5,680	5,578	5,631	5,732	5,785	5,886	5,834
INFY	1,467	1,462	1,449	1,458	1,470	1,479	1,492	1,483

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	409	407	403	406	409	412	416	413
JIOFIN	298	298	294	296	300	302	305	303
JSWSTEEL	1,170	1,162	1,150	1,160	1,172	1,182	1,194	1,184
KOTAKBANK	2,080	2,072	2,054	2,067	2,085	2,099	2,117	2,104
LT	3,893	3,872	3,808	3,851	3,914	3,957	4,020	3,978
M&M	3,615	3,586	3,537	3,576	3,625	3,664	3,714	3,675
MARUTI	15,449	15,309	15,206	15,327	15,431	15,552	15,656	15,534
MAXHEALTH	1,129	1,119	1,103	1,116	1,131	1,144	1,160	1,147
NESTLEIND	1,273	1,260	1,252	1,262	1,271	1,281	1,289	1,279
NTPC	327	325	320	323	328	332	337	333
ONGC	252	250	248	250	253	255	258	256
POWERGRID	270	270	264	267	273	276	282	279
RELIANCE	1,495	1,476	1,465	1,480	1,491	1,506	1,516	1,502
SBILIFE	1,970	1,964	1,948	1,959	1,975	1,986	2,002	1,991
SBIN	960	955	946	953	962	969	978	971
SHRIRAMFIN	792	785	777	784	793	800	808	801
SUNPHARMA	1,686	1,667	1,635	1,661	1,692	1,718	1,749	1,724
TATACONSUM	1,181	1,167	1,155	1,168	1,180	1,193	1,205	1,193
TATASTEEL	177	177	174	176	178	180	182	181
TCS	3,010	2,990	2,974	2,992	3,008	3,026	3,042	3,024
TECHM	1,416	1,410	1,405	1,410	1,416	1,421	1,427	1,421
TITAN	3,770	3,762	3,714	3,742	3,790	3,818	3,866	3,838
TMPV	408	405	403	406	408	410	412	410
TRENT	4,674	4,635	4,602	4,638	4,671	4,707	4,740	4,704
ULTRACEMCO	11,942	11,798	11,721	11,832	11,908	12,019	12,095	11,985
WIPRO	240	238	237	239	240	241	242	241

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