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7-Nov-25

MOSt Market Roundup

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Market Update

Nifty : 25,492.30 -17.40 (-0.07%) Sensex : 83,216.28 -94.73 (-0.11%)

- Equity benchmark Nifty staged a strong recovery of over 200 points from the day's low to end flat, supported by upbeat quarterly earnings that boosted investor sentiment. Market mood further improved after U.S. President Donald Trump mentioned that trade talks with Prime Minister Narendra Modi were progressing well and confirmed his upcoming visit to India.
- The Nifty slipped 17 points, or 0.07%, to close at 25,492 after hitting an intraday low of 25,318. NBFC and capital market stocks were the key outperformers, with LTF rallying 10% to ₹303 on the back of robust quarterly results. Capital market counters also gained momentum after Finance Minister Nirmala Sitharaman addressed the ongoing debate on futures and options trading, driving BSE shares up 9% to ₹2,678.
- Globally, U.S. markets fell nearly 2%, and Asian indices dropped up to 2% amid worries over stretched valuations in AI-related stocks and signs of a cooling labor market. Sentiment was further dampened after Chicago Fed President Austan Goolsbee voiced concerns about continuing rate cuts due to the lack of inflation data during the U.S. government shutdown.

Technical Outlook:

- Nifty index opened on a negative note and after slipping to 25300 zones, it witnessed attempts of buying and moved northward for the rest of the session to cross 25550 levels. It formed a bullish candle on daily frame with longer lower shadow which signals buying can be seen at support levels near its 50 DEMA but it still continues to form lower highs – lower lows from the last six sessions.
- It formed a bearish candle on the weekly frame and lost almost 500 points in the truncated week. Now if it manages to cross and hold above 25500 zones then buying could be seen towards 25650 then 25800 zones while a hold below the same could see weakness towards 25300 then 25200 zones.

Derivative Outlook:

- Nifty future closed negative with losses of 0.09% at 25605 levels. Positive setup seen in BSE, Angel Once, Paytm, LTF, AB Capital, Shriram Finance, Bajaj Finance, LICI, MCX and M & M while weakness in Amber, Bharti Airtel, ABB, PGEL, Delhivery, Cyient, Mankind Pharma, NHPC, Godrej Properties and Apollo Hospital.
- On option front, Maximum Call OI is at 26000 then 25600 strike while Maximum Put OI is at 25400 then 25300 strike. Call writing is seen at 25500 then 25400 strike while Put writing is seen at 25400 then 25300 strike. Option data suggests a broader trading range in between 25000 to 26000 zones while an immediate range between 25300 to 25700 levels.

Today’s News

- **Paradeep Phosphates -** Company announces Rs 3600cr expansion program.
- **BHEL -** Company wins an order worth of Rs 6650cr from NTPC.
- **Raitel Corp -** Company received orders worth Rs 65.7cr from Gujarat Education Department for 'Sarv Shiksha Abhiyan.
- **NBCC -** Company gets order worth of Rs 350cr for Civil Works Consultancy.
- **NTPC Green Energy -** Company to issue NCD of Rs 1500cr at 7.01% coupon.
- **Aegis Vopak Terminals -** Company will raise up to Rs 660 crore via non-convertible debentures on a private placement basis.
- **Alembic Pharmaceuticals -** Company received the US Food and Drug Administration's approval for Dasatinib tablets. These tablets are indicated for the treatment for Leukemia in adults.
- **TeamLease Services -**Company bought additional 10% stake in arm TSR Darashaw HR Services. It became the company's wholly-owned subsidiary post acquisition.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,492	25,318	25,221	25,357	25,454	25,590	25,687	25,551
ADANIENT	2,375	2,291	2,245	2,310	2,356	2,421	2,467	2,403
ADANIPORTS	1,449	1,425	1,407	1,428	1,446	1,467	1,485	1,464
APOLLOHOSP	7,642	7,626	7,454	7,548	7,720	7,814	7,985	7,891
ASIANPAINT	2,612	2,585	2,571	2,592	2,605	2,626	2,639	2,619
AXISBANK	1,224	1,217	1,212	1,218	1,223	1,230	1,235	1,229
BAJAJ-AUTO	8,717	8,605	8,546	8,632	8,691	8,776	8,835	8,750
BAJAJFINSV	2,110	2,043	2,019	2,065	2,088	2,134	2,157	2,112
BAJFINANCE	1,070	1,034	1,018	1,044	1,060	1,086	1,103	1,077
BEL	414	405	401	408	412	419	423	416
BHARTIARTL	2,002	1,996	1,963	1,982	2,015	2,034	2,067	2,048
CIPLA	1,510	1,492	1,485	1,498	1,504	1,516	1,522	1,510
COALINDIA	376	372	370	373	375	378	380	377
DRREDDY	1,207	1,198	1,192	1,199	1,206	1,213	1,220	1,212
EICHERMOT	6,885	6,721	6,658	6,771	6,834	6,948	7,011	6,897
ETERNAL	306	301	298	302	305	310	313	309
GRASIM	2,724	2,676	2,650	2,687	2,713	2,749	2,775	2,738
HCLTECH	1,511	1,491	1,478	1,495	1,507	1,523	1,535	1,519
HDFCBANK	984	975	971	978	981	988	991	985
HDFCLIFE	750	731	724	737	744	757	763	751
HINDALCO	791	783	772	781	792	801	812	803
HINDUNILVR	2,417	2,401	2,390	2,403	2,414	2,428	2,439	2,425
ICICIBANK	1,343	1,319	1,309	1,326	1,335	1,352	1,361	1,344
INDIGO	5,605	5,569	5,501	5,553	5,621	5,673	5,742	5,690
INFY	1,478	1,449	1,438	1,458	1,469	1,490	1,501	1,481
ITC	404	403	400	402	406	408	412	409
JIOFIN	300	294	291	295	298	302	304	300
JSWSTEEL	1,174	1,151	1,138	1,156	1,169	1,188	1,201	1,183
KOTAKBANK	2,090	2,059	2,043	2,066	2,083	2,106	2,123	2,099
LT	3,882	3,831	3,807	3,845	3,869	3,906	3,931	3,893
M&M	3,685	3,567	3,505	3,595	3,657	3,746	3,808	3,718
MARUTI	15,490	15,260	15,177	15,334	15,416	15,573	15,655	15,499
MAXHEALTH	1,136	1,120	1,111	1,124	1,133	1,145	1,154	1,142
NESTLEIND	1,263	1,256	1,249	1,256	1,263	1,270	1,278	1,271
NTPC	326	321	318	322	325	328	331	327
ONGC	253	250	248	250	252	254	256	254
POWERGRID	272	269	267	269	271	273	275	273
RELIANCE	1,480	1,476	1,462	1,471	1,485	1,494	1,507	1,498
SBILIFE	2,004	1,958	1,942	1,973	1,989	2,019	2,035	2,004
SBIN	955	944	934	944	955	965	975	965
SHRIRAMFIN	818	781	767	792	806	832	845	820
SUNPHARMA	1,693	1,683	1,668	1,681	1,695	1,707	1,722	1,710
TATACONSUM	1,167	1,156	1,138	1,153	1,170	1,185	1,202	1,188
TATASTEEL	182	175	172	177	180	184	187	182
TCS	2,994	2,961	2,943	2,968	2,986	3,012	3,030	3,004
TECHM	1,387	1,385	1,369	1,378	1,394	1,403	1,419	1,410
TITAN	3,768	3,736	3,709	3,739	3,765	3,795	3,821	3,792
TMPV	406	401	399	402	405	408	411	407
TRENT	4,619	4,611	4,549	4,584	4,646	4,681	4,743	4,708
ULTRACEMCO	11,850	11,834	11,761	11,806	11,878	11,923	11,995	11,951
WIPRO	237	236	234	235	237	239	241	239

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