



MOSt Market Roundup



Market Update

Nifty : 25,574.35 +82.05 (+0.32%)

Sensex : 83,535.35 +319.07 (+0.38%)

- Equity benchmarks ended higher, with the Sensex climbing over 300 points and the Nifty reclaiming the 25,550 mark, supported by a rally in global markets. Investor sentiment improved on expectations of an end to the prolonged U.S. government shutdown and optimism over a robust corporate earnings season. Positive cues also came from hopes of progress in the U.S.-India trade deal and strong domestic economic indicators.
- Buying was seen across IT, metal, sugar, select pharma, and defense stocks. The Sensex advanced 319 points, or 0.40%, to close at 83,535, while the Nifty gained 82 points, or 0.30%, to settle at 25,574.
- Globally, U.S. index futures rose over 1%, while Asian and European markets gained up to 1%, driven by a rebound in technology shares following last week's selloff on valuation concerns. Optimism around a resolution to the U.S. government shutdown further boosted sentiment.
- The Nifty IT Index surged 1.5%, led by Infosys, HCL Tech, LTI Mindtree, and TCS, following strong quarterly results and gains in the Nasdaq Futures. Defense stocks also witnessed renewed buying interest after HAL signed a major deal with General Electric (GE), USA, for the supply of 113 F404-GE-IN20 engines and related support packages for 97 LCA Mk1A aircraft. HAL shares jumped 3.5% to close at ₹4,790, while the Nifty Defense Index advanced 1.2%.
- In the metal space, the Nifty Metal Index rose 0.6% after National Aluminium Company (Nalco) reported strong Q2 results. Nalco shares surged 10% to ₹257 with heavy trading volumes of 7.27 crore shares on the NSE.

Technical Outlook:

- Nifty index opened on a positive note and moved upwards beyond 25650 zones. It witnessed some consolidation in the second half of the session but support levels were intact. Throughout the session it maintained the upside trajectory with advances outpacing declines.
- It formed a bullish candle on the daily frame and negated its lower highs – lower lows formation of the last six sessions. Now it has to hold above 25500 zones for momentum to continue towards 25650 then 25800 zones while supports can be seen at 25450 then 25300 zones.

Derivative Outlook:

- Nifty future closed positive with gains of 0.42% at 25696 levels. Positive setup seen in Uno minda, Torrent pharma, KPIT Technologies, BHEL, SAIL, IIFL, Lupin, Larus labs, Power India and Bajaj Finance while weakness in Trent, NCC, Max Healthcare, Fortis, Tata consumer, VBL, Mankind Pharma, HFCL, Samvardhana Motherson and Apollo Hospital.
- On option front, Maximum Call OI is at 25700 then 25600 strike while Maximum Put OI is at 25600 then 25500 strike. Call writing is seen at 25650 then 25700 strike while Put writing is seen at 25600 then 25500 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

- **Dreamfolks Services** - Company will invest Rs11.46 crore to acquire a 50.01% partnership stake in Ten 11 Hospitality LLP, a premium railway lounge operator.
- **Emcure Pharmaceuticals** - Novo Nordisk India has entered into a strategic partnership with Emcure Pharmaceuticals to launch Poviztra®, the second brand of Wegovy® (semaglutide injection 2.4 mg), as part of efforts to widen access to its globally acclaimed anti-obesity therapy.
- **IndusInd Bank** - Company announced the appointment of Mr. Amitabh Kumar Singh as its new Chief Human Resources Officer (CHRO). Mr. Singh brings with him over 28 years of experience in human resources, having spent 21 years with the ICICI Group.
- **Alembic Pharma** - Company announced that it has received final approval from the US FDA for its Abbreviated New Drug Application (ANDA) sumatriptan injection USP. This is Alembic's first drug device combination product. Sumatriptan injection USP, 4 mg/0.5 mL and 6 mg/0.5 mL, single-dose autoinjector system, have an estimated market size of US\$ 73 million for twelve months ending September 2025 according to IQVIA.
- **Marksans Pharma's Goa facility clears US FDA inspection with zero observations** - Company announced that its second manufacturing facility in Verna, Goa, successfully completed a current Good Manufacturing Practice (cGMP) inspection conducted by the US Food and Drug Administration (US FDA) with zero Form 483 observations.
- **Adani-JKH Sri Lanka Terminal Posts Strong Volume Growth** - Colombo West International Terminal, backed by Adani Ports and Sri Lanka's John Keells Holdings, is seeing "spectacular" transshipment volume growth, driven in part by economic expansion in India, according to Chief Executive Officer Munish Kanwar. Monthly box volumes have reached an average 100,000 since the terminal began operations in April. Expects year ending March 2026 volumes of about 1 million containers.
- **Government considers Sugar Exports of 1.5 Million Tons** - Government is considering a proposal to allow sugar mills to export 1.5 million tons of the sweetener in 2025-26, as the outlook for an abundant harvest raises concerns about a looming glut.

Global Market Update

- **Asian Market** - Asian stocks rose, supported by a rebound in technology shares following a selloff last week on concerns over lofty valuations. Hopes of a possible end to the longest US government shutdown also lifted sentiment. Japan, Hong Kong, South Korea and Taiwan Index surged 1%.
- **European Market** - European stocks climbed on Monday as hopes for a deal to end the US government shutdown boosted risk. UK, Germany and France Index gained up to 1%.
- **US Data** - Manufacturing PMI.
- **Commodity** - Oil rose 1% to above \$64/bbl as wider markets were lifted by a push to end the US government shutdown, with crude traders also looking toward a data-heavy week that'll yield insights into whether a global glut is forming.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,574	25,504	25,427	25,501	25,577	25,651	25,727	25,653
ADANIENT	2,365	2,364	2,348	2,357	2,372	2,381	2,396	2,388
ADANIPORTS	1,444	1,441	1,427	1,435	1,450	1,458	1,473	1,464
APOLLOHOSP	7,534	7,515	7,430	7,482	7,567	7,619	7,705	7,653
ASIANPAINT	2,652	2,611	2,588	2,620	2,643	2,675	2,699	2,667
AXISBANK	1,216	1,216	1,204	1,210	1,221	1,227	1,239	1,233
BAJAJ-AUTO	8,770	8,686	8,612	8,691	8,765	8,844	8,917	8,838
BAJAJFINSV	2,120	2,096	2,084	2,102	2,114	2,133	2,145	2,127
BAJFINANCE	1,087	1,063	1,054	1,070	1,079	1,095	1,104	1,088
BEL	417	414	411	414	417	420	424	420
BHARTIARTL	2,021	1,992	1,977	1,999	2,014	2,035	2,050	2,029
CIPLA	1,508	1,504	1,497	1,502	1,510	1,515	1,522	1,517
COALINDIA	382	376	374	378	380	384	386	382
DRREDDY	1,199	1,195	1,187	1,193	1,201	1,207	1,216	1,210
EICHERMOT	6,895	6,801	6,755	6,825	6,870	6,940	6,985	6,916
ETERNAL	302	301	296	299	304	307	311	309
GRASIM	2,762	2,729	2,700	2,731	2,760	2,791	2,820	2,789
HCLTECH	1,540	1,511	1,499	1,519	1,532	1,553	1,566	1,545
HDFCBANK	985	980	975	980	985	990	996	991
HDFCLIFE	750	749	742	746	753	757	764	760
HINDALCO	785	784	774	779	790	795	806	800
HINDUNILVR	2,409	2,404	2,389	2,399	2,414	2,424	2,439	2,429
ICICIBANK	1,347	1,341	1,337	1,342	1,346	1,351	1,354	1,350
INDIGO	5,586	5,541	5,490	5,538	5,589	5,637	5,688	5,640
INFY	1,515	1,490	1,478	1,497	1,508	1,527	1,538	1,520

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	406	404	402	404	406	408	409	407
JIOFIN	302	300	298	300	302	303	305	303
JSWSTEEL	1,181	1,172	1,166	1,174	1,179	1,187	1,192	1,185
KOTAKBANK	2,090	2,081	2,068	2,079	2,092	2,103	2,116	2,105
LT	3,917	3,894	3,868	3,893	3,918	3,942	3,968	3,944
M&M	3,666	3,645	3,605	3,635	3,676	3,706	3,746	3,716
MARUTI	15,600	15,380	15,275	15,438	15,542	15,705	15,809	15,647
MAXHEALTH	1,100	1,096	1,068	1,084	1,113	1,129	1,157	1,141
NESTLEIND	1,262	1,260	1,252	1,257	1,265	1,270	1,278	1,273
NTPC	325	324	322	323	326	328	330	328
ONGC	252	250	246	249	252	255	258	256
POWERGRID	268	267	264	266	268	270	272	271
RELIANCE	1,490	1,476	1,463	1,477	1,489	1,502	1,514	1,501
SBILIFE	1,990	1,985	1,965	1,978	1,998	2,010	2,031	2,018
SBIN	951	949	940	945	954	959	968	963
SHIRIRAMFIN	821	817	809	815	823	829	837	831
SUNPHARMA	1,693	1,686	1,677	1,685	1,694	1,702	1,711	1,703
TATACONSUM	1,141	1,139	1,116	1,129	1,151	1,164	1,186	1,174
TATASTEEL	182	180	179	180	181	183	184	183
TCS	3,025	2,992	2,966	2,995	3,022	3,051	3,078	3,048
TECHM	1,397	1,384	1,374	1,386	1,395	1,406	1,416	1,404
TITAN	3,800	3,769	3,749	3,775	3,795	3,820	3,840	3,815
TMPV	411	406	403	407	410	414	417	413
TRENT	4,284	4,263	4,058	4,171	4,376	4,488	4,693	4,580
ULTRACEMCO	11,750	11,701	11,591	11,671	11,780	11,860	11,969	11,890
WIPRO	240	237	235	237	239	242	244	242

Siddhartha Khemka
Head - Retail Research

Chandan Taparia, CMT, CFTe
Head - Derivatives & Technical Research

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Nainesh Rajani

Email: nainesh.rajani@motilaloswal.com

Contact: (+65) 8328 0276

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Grievance Redressal Cell:

Contact Person	Contact No.	Email ID
Ms. Hemangi Date	022 40548000 / 022 67490600	query@motilaloswal.com
Ms. Kumud Upadhyay	022 40548082	servicehead@motilaloswal.com
Mr. Ajay Menon	022 40548083	am@motilaloswal.com
Mr. Neeraj Agarwal	022 40548085	na@motilaloswal.com
Mr. Siddhartha Khemka	022 50362452	po.research@motilaloswal.com

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