



# **MOSt Market Roundup**



# Market Update

**Nifty : 25,790.25 +106.95 (+0.42%)**

**Sensex : 83,878.17 +301.93 (+0.36%)**

- Equity benchmarks, the Sensex and the Nifty, snapped a five-day losing streak as value buying emerged in an oversold market, supported by optimism that the US and India are working toward resolving differences related to their trade deal. The indices staged a sharp recovery during the session, with the Sensex rebounding nearly 1,000 points from its intraday low, while the Nifty recovered over 300 points on hopes of progress in the US-India trade negotiations.
- Additionally, traders covered short positions ahead of the Q3 earnings announcements by IT majors HCL Technologies and TCS, along with the release of domestic inflation data later today. Expectations of strong quarterly results and a favourable Union Budget further boosted market sentiment.
- Most sectoral indices—including auto, metal, IT, defence, banking, and FMCG—recovered from their intraday lows. The Sensex ended 301 points, or 0.3%, higher at 82,878 after hitting an intraday low of 83,962, while the Nifty gained 107 points, or 0.4%, to close at 25,790 after touching a low of 25,473.
- The Nifty Metal index rose 2% amid rising base metal prices on the London Metal Exchange, with aluminium prices surging to a four-year high. Hindustan Copper jumped 4.8% to close at ₹545.
- In global markets, US index futures declined, while European markets traded mixed after US Federal Reserve Chair Jerome Powell stated that he is under criminal investigation.

## Technical Outlook:

- Nifty index opened negative and continued steep selling pressure which made the index break 25500 marks. The second half of the session however saw a massive recovery from the support levels and it recouped around 350 points from the intraday low to cross 25800 marks. It formed a bullish candle on the daily frame with longer lower shadow indicating smart buying from the lower levels. It managed to close in gains of around 110 points but is still forming lower highs – lower lows from the last five sessions. Now it has to cross and hold above 25800 for strength to rebuild towards 25950 then 26150 marks while support can be seen at 25650 then 25500 zones.
- S&P BSE Sensex index opened on a negative note and extended its weakness in the first half with bears clearly dominating the session. However sentiment reversed sharply in the second half as bulls took control and staged a strong recovery of more than 1000 points from its intraday low. This late buying erased much of the bearish pressure and signalled a potential change in the recent market undertone. On the daily chart it formed a hammer candle indicating a possible shift in momentum. Now it has to cross and hold above 84000 zone for an upside move towards 84200 then 84500 while hold below the same could see weakness towards 83500 and then 83300 zones.

## Derivative Outlook:

- Nifty future closed positive with gains of 0.36% at 25880 levels. Positive setup seen in Coal India, Tata Steel, Godrej CP, MCX, Hindalco, AU Bank, Muthoot Finance, Titan, Lupin and Union Bank while weakness in Cummins India, Delhivery, CG Power, Biocon, Fortis, Bajaj Finance, Paytm, IRCTC, RVNL and Max Healthcare.
- On option front, Maximum Call OI is at 26000 then 25800 strike while Maximum Put OI is at 25700 then 25500 strike. Call writing is seen at 25800 then 25850 strike while Put writing is seen at 25700 then 25600 strike. Option data suggests a broader trading range in between 25400 to 26200 zones while an immediate range between 25600 to 26000 levels.

# Today's News

- **Websol Energy** - Company got approval from the Andhra Pradesh government for its greenfield 4 GW solar cell and 4 GW solar module project with total investment Rs3538cr.
- **Maruti Suzuki approves land parcel purchase worth nearly ₹5,000 crore in Gujarat** - Company's board has given its approval to acquire land for the expansion of production capacity in Gujarat.
- **Premier Energies To Add 7.4 GW Cell, 6 GW Module Capacity Annually At Rs 11,000-Crore Capex** - Company is looking to more than double its annual cell and module manufacturing capacity to 10.6 gigawatt and 11.1 gigawatt, respectively, as part of its Rs 11,000-crore expansion plan, to meet domestic demand, a company official said.
- **Trump, Modi are 'real friends' as India-US 'actively engage' on trade, says US Ambassador Sergio Gor** - The India-US relationship is rooted in genuine friendship, US Ambassador to India Sergio Gor said on Monday, as he assumed charge in New Delhi and signaled continuity in trade discussions between the two countries. "Real friends can disagree, but resolve the difference," Gor said, framing ongoing trade negotiations as part of a broader, resilient partnership built on trust between Prime Minister Narendra Modi and US President Donald Trump.
- **Man Industries** - Man Industries won order worth Rs550cr.
- **Kotak Bank** - Company names Anup Kumar Saha additional director.
- **Globus Spirits** - Revenue up 19.1% (YoY) at Rs 717 crore, Ebitda at Rs 75 crore versus Rs 34.3 crore (YoY) Ebitda Margin at 10.5% versus 5.7% (YoY) and Net Profit at Rs 30.7 crore versus Rs 55 lakh (YoY).
- **IREDA** - Total income up 26% at Rs 2,140 crore versus Rs 1,699 crore (YoY) Net profit up 37.6% at Rs 585 crore versus Rs 425 crore (YoY).

## Global Market Update

- **European Market** - European stocks retreated from record highs as concerns over the independence of the Federal Reserve sapped investor confidence.
- **Asian Market** - Asian stocks rose as a rally in the region's tech shares and a weaker US dollar boosted sentiment, helping offset broader concerns over rising geopolitical tensions.
- **Commodity** - Brent Crude - Oil held its biggest two-day gain since October, as escalating protests in Iran threatened supply from OPEC's fourth-biggest producer. Brent traded above \$63 a barrel.

# Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,790	25,473	25,353	25,571	25,692	25,911	26,032	25,813
ADANIENT	2,177	2,119	2,098	2,137	2,159	2,198	2,220	2,180
ADANIPORTS	1,446	1,404	1,389	1,417	1,432	1,461	1,475	1,447
APOLLOHOSP	7,267	7,111	7,044	7,156	7,223	7,334	7,401	7,290
ASIANPAINT	2,896	2,808	2,776	2,836	2,868	2,928	2,960	2,900
AXISBANK	1,275	1,267	1,261	1,268	1,274	1,281	1,287	1,280
BAJAJ-AUTO	9,479	9,360	9,247	9,363	9,476	9,591	9,704	9,589
BAJAJFINSV	2,001	1,973	1,960	1,981	1,993	2,014	2,027	2,006
BAJFINANCE	950	940	929	939	950	961	972	961
BEL	418	411	407	412	416	421	425	420
BHARTIARTL	2,043	2,001	1,983	2,013	2,031	2,061	2,078	2,049
CIPLA	1,464	1,444	1,435	1,450	1,459	1,473	1,482	1,468
COALINDIA	433	416	410	421	427	439	445	433
DRREDDY	1,217	1,200	1,193	1,205	1,212	1,224	1,231	1,219
EICHERMOT	7,443	7,322	7,239	7,341	7,424	7,526	7,609	7,507
ETERNAL	285	277	273	279	283	289	292	286
GRASIM	2,805	2,738	2,705	2,755	2,788	2,838	2,872	2,822
HCLTECH	1,667	1,642	1,626	1,647	1,662	1,682	1,698	1,677
HDFCBANK	936	930	924	930	936	942	948	942
HDFCLIFE	755	750	741	748	757	764	773	767
HINDALCO	921	897	888	905	913	930	938	922
HINDUNILVR	2,409	2,361	2,342	2,375	2,395	2,428	2,448	2,414
ICICIBANK	1,420	1,392	1,379	1,400	1,412	1,432	1,445	1,424
INDIGO	4,849	4,771	4,732	4,790	4,830	4,888	4,928	4,869
INFY	1,598	1,593	1,580	1,589	1,601	1,610	1,622	1,613

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	338	336	334	336	338	340	341	340
JIOFIN	288	281	278	283	286	291	294	289
JSWSTEEL	1,185	1,146	1,134	1,159	1,172	1,198	1,211	1,185
KOTAKBANK	2,134	2,106	2,093	2,114	2,126	2,147	2,160	2,139
LT	4,024	3,944	3,916	3,970	3,998	4,053	4,081	4,027
M&M	3,685	3,599	3,549	3,617	3,667	3,735	3,785	3,717
MARUTI	16,605	16,271	16,153	16,379	16,497	16,723	16,841	16,615
MAXHEALTH	1,016	994	984	1,000	1,010	1,026	1,036	1,020
NESTLEIND	1,313	1,292	1,281	1,297	1,307	1,323	1,334	1,318
NTPC	338	334	330	334	337	341	344	341
ONGC	236	232	230	233	234	237	239	236
POWERGRID	259	254	252	256	258	261	263	260
RELIANCE	1,484	1,451	1,439	1,462	1,473	1,496	1,508	1,485
SBILIFE	2,091	2,080	2,067	2,079	2,092	2,104	2,118	2,106
SBIN	1,015	996	988	1,001	1,009	1,023	1,031	1,017
SHIRIRAMFIN	969	962	949	959	972	982	996	986
SUNPHARMA	1,736	1,714	1,701	1,719	1,731	1,749	1,762	1,744
TATACONSUM	1,190	1,174	1,164	1,177	1,187	1,200	1,210	1,197
TATASTEEL	183	178	176	179	182	185	188	184
TCS	3,243	3,174	3,145	3,194	3,223	3,272	3,301	3,252
TECHM	1,585	1,563	1,549	1,567	1,581	1,598	1,612	1,594
TITAN	4,229	4,145	4,108	4,168	4,205	4,265	4,302	4,242
TMPV	351	348	344	347	351	354	357	354
TRENT	4,050	3,959	3,918	3,984	4,025	4,091	4,132	4,066
ULTRACEMCO	12,120	11,786	11,672	11,896	12,010	12,234	12,348	12,124
WIPRO	263	259	257	260	262	266	268	265

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