

# MOST Market Roundup

# Market Update

**Nifty : 24,031.70 +312.40 (+1.32%)      Sensex : 76,488.96 +1073.61 (+1.42%)**

- Equity benchmark indices witnessed a strong rally, with the Sensex surging over 1000 points and the Nifty closing above the 24,000 mark, supported by improving global sentiment following a sharp correction in crude oil prices. Brent crude declined more than 4% to a one-month low below \$100 per barrel, amid growing optimism over a potential peace agreement between the U.S. and Iran.
- Investor confidence improved significantly after reports indicated progress in diplomatic discussions aimed at reopening the Strait of Hormuz and restoring smoother global oil flows. Hopes that tensions in the Gulf region could ease further supported sentiment across global financial markets.
- Lower crude oil prices, easing pressure on the USD/INR to 95.2 level, optimism surrounding the ongoing U.S.-Iran peace negotiations, and strong global market cues collectively lifted domestic equities.
- The Nifty gained 312 points (1.3%) to close at 24031, while the Sensex advanced 1073 points (1.3%) to settle at 76,488.
- Sectorally, most indices ended in positive territory. The Nifty PSU Bank index emerged as the top performer, gaining nearly 3%, followed by Defence, Auto, and Realty indices, which rose up to 2% during the session.
- Among the global markets, Asia and European market gained up to 3% along with US Index future rose more than 1% due to oil price fell over 5% to 1-month low at below \$98/bbl on hope of United States and Iran had agreed in principle to a peace deal that would reopen the Strait of Hormuz.

## Technical Outlook:

- Nifty index opened gap up by around 220 points and remained afloat at higher zones even though it consolidated for most part of the day. It witnessed renewed buying in the last hour and managed to close above 24k levels with gains of more than 300 points. It formed a bullish candle on the daily frame and has been making higher lows from the last three sessions. Now it has to hold above 24000 zones for an up move towards 24200 then 24400 zones while on the downside support can be seen at 23900 then 23800 zones.
- S&P BSE Sensex index opened with a gap up of 720 points near 76100 zones and gave a range breakout of the last seven sessions. After the strong opening, it traded sideways for most part of the session followed by a sharp up move in the last hour. It formed a bullish marubozu candle on the daily chart and closed the session near its day's high with gains of around 1070 points indicating strong buying momentum. Now it has to hold above 76200 zones for an up move towards 77000 then 77200 levels while support have shifted higher to 76200 then 76000 zones.

## Derivative Outlook:

- Nifty future closed positive with gains of 1.58% at 24119 levels. Positive setup seen in Eicher Motors, Gail, Sammaan Capital, Oberoi Realty, Uno Minda, TMPV, Zydus Life, Wipro, PNB Housing and NBCC while weakness seen in Oil India, Nykaa, Max Health, ONGC, Godrej Consumer, Mankind, Dabur, Tata Consumer, Nestle and Dmart.
- On option front, Maximum Call OI is at 24000 then 24500 strike while Maximum Put OI is at 24000 then 23900 strike. Call writing is seen at 24000 then 24050 strike while Put writing is seen at 24000 then 23900 strike. Option data suggests a broader trading range in between 23500 to 24500 zones while an immediate range between 23800 to 24300 levels.

# Today's News

- **Puravankara** – Company acquires 14.57-acre land in Mandur, Bengaluru, with a GDV of Rs 2,300cr, boosting its development pipeline and Bengaluru portfolio.
- **Hindustan Zinc** - Company's Rampura Agucha Mine becomes India's first Zinc Mark certified mine, boosting ESG credibility and global customer trust.
- **Jupiter Wagon** - Company's JEM Energy signs MoUs with Chalukya Power and Pickrenew Energy, adding 110 MWh BESS projects to its INR 150 Cr orderbook, targeting INR 200 Cr for FY 2026-27.
- **Kalpataru Ltd.** announces a ₹1,250 crore cluster redevelopment project in Kandivali East, spanning 2.8 acres with 0.37 msf carpet area, enhancing its leadership in Mumbai's real estate market.
- **IRFC** – Company inks Rs 13,527 cr refinancing deal with L&T Metro Rail for Hyderabad Metro, boosting urban transit and sustainable mobility infrastructure.
- **Rosell Techsys** – Company focuses on semiconductor ramp-up and expands its US customer base, signaling growth opportunities in the tech sector.
- **JSW Steel** – Company partners with Bharatia and Carbon Iceland International to develop a 300 KTPA green methanol project in India, advancing industrial decarbonization.
- **Ashok Leyland** – Company secures a major order of 715 vehicles from VRL Logistics, reinforcing their decades-long partnership and leadership in commercial vehicles.

## Global Market Update

- **European Market** - European shares advance as oil declines with the US and Iran inching toward a deal to end the nearly three-month war. Trading volumes will be lower as markets including London are closed for a holiday. Both Germany and France Index gained 1% each.
- **Asian Market** – Asian markets witnessed smart rally while Japan's Topix benchmark rose 3% to closed at an all-time high as strong demand for AI servers lifted tech shares and signs of progress toward a US-Iran peace deal ignited risk appetite. Australia and China and South Korea Index gained up to 2%.
- **US Data** - US market close today.
- **Commodity** - Oil prices fell sharply by 5% to below \$98/bbl after American officials said that the United States and Iran had agreed in principle to a peace deal that would reopen the Strait of Hormuz.

# Pivot Table

Co. Name	Close	Low	S2	S1	PP	RI	R2	High
NIFTY 50	24,032	23,923	23,871	23,952	24,003	24,083	24,135	24,054
ADANIENT	2,847	2,739	2,696	2,771	2,815	2,891	2,935	2,859
ADANIPTS	1,805	1,793	1,783	1,794	1,804	1,815	1,824	1,813
APOLLOHOSP	8,415	8,375	8,343	8,379	8,411	8,447	8,479	8,443
ASIANPAINT	2,658	2,653	2,634	2,646	2,665	2,677	2,696	2,684
AXISBANK	1,311	1,294	1,286	1,298	1,306	1,319	1,327	1,315
BAJAJ-AUTO	10,504	10,431	10,229	10,367	10,568	10,706	10,907	10,770
BAJAJFINSV	1,810	1,783	1,773	1,791	1,802	1,820	1,830	1,812
BAJFINANCE	944	924	918	931	937	950	957	944
BEL	422	417	415	419	421	424	426	423
BHARTIARTL	1,879	1,863	1,849	1,864	1,878	1,893	1,908	1,893
CIPLA	1,413	1,399	1,389	1,401	1,411	1,423	1,432	1,420
COALINDIA	458	456	452	455	459	462	465	463
DRREDDY	1,333	1,299	1,282	1,308	1,324	1,349	1,366	1,341
EICHERMOT	7,432	7,215	7,143	7,287	7,360	7,504	7,577	7,432
ETERNAL	248	244	242	245	247	250	252	249
GRASIM	3,172	3,128	3,100	3,136	3,164	3,200	3,228	3,192
HCLTECH	1,167	1,162	1,153	1,160	1,169	1,176	1,185	1,178
HDFCBANK	787	775	771	779	784	792	796	788
HDFCLIFE	620	617	613	617	620	623	626	623
HINDALCO	1,099	1,081	1,061	1,080	1,100	1,119	1,139	1,120
HINDUNILVR	2,198	2,193	2,164	2,181	2,210	2,226	2,255	2,238
ICICIBANK	1,294	1,271	1,263	1,278	1,286	1,301	1,309	1,294
INDIGO	4,498	4,439	4,392	4,445	4,492	4,545	4,591	4,538
INFY	1,168	1,166	1,154	1,161	1,173	1,180	1,192	1,185

Co. Name	Close	Low	S2	S1	PP	RI	R2	High
ITC	304	302	301	303	304	306	307	306
JIOFIN	242	240	239	240	242	244	245	244
JSWSTEEL	1,289	1,284	1,277	1,283	1,290	1,296	1,304	1,297
KOTAKBANK	393	387	384	389	392	397	400	395
LT	4,035	3,962	3,935	3,985	4,012	4,062	4,089	4,038
M&M	3,145	3,111	3,081	3,113	3,143	3,175	3,206	3,174
MARUTI	13,188	13,101	13,040	13,114	13,175	13,249	13,310	13,236
MAXHEALTH	1,001	994	973	987	1,008	1,022	1,043	1,029
NESTLEIND	1,418	1,410	1,393	1,406	1,422	1,435	1,451	1,439
NTPC	391	386	384	388	390	394	397	393
ONGC	285	284	281	283	286	288	292	290
POWERGRID	295	294	292	294	296	298	300	299
RELIANCE	1,366	1,357	1,351	1,359	1,365	1,373	1,379	1,371
SBILIFE	1,903	1,880	1,871	1,887	1,896	1,912	1,921	1,905
SBIN	972	958	952	962	967	977	982	973
SHRIRAMFIN	963	957	950	956	963	970	977	971
SUNPHARMA	1,844	1,825	1,815	1,830	1,839	1,854	1,863	1,849
TATACONSUM	1,187	1,182	1,172	1,179	1,189	1,197	1,206	1,199
TATASTEEL	210	209	208	209	210	212	213	212
TCS	2,307	2,293	2,276	2,292	2,309	2,325	2,342	2,326
TECHM	1,439	1,421	1,411	1,425	1,435	1,449	1,459	1,445
TITAN	4,152	4,110	4,085	4,118	4,144	4,178	4,204	4,170
TMPV	374	366	363	369	371	377	380	374
TRENT	4,304	4,290	4,247	4,276	4,319	4,348	4,391	4,362
ULTRACEMCO	11,733	11,614	11,532	11,633	11,714	11,815	11,896	11,796
WIPRO	206	204	201	204	207	209	212	210

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