

# MOST Market Roundup



# Market Update

**Nifty : 24,246.70 -82.25 (-0.34%)**

**Sensex : 79,801.43 -315.06 (-0.39%)**

- Equity benchmarks Sensex and Nifty ended slightly lower due to profit booking after a six-day rally. Traders locked in gains ahead of the April F&O expiry, amid concerns over trade negotiations led by former U.S. President Trump with China and European nations.
- A weak start in European markets and a decline in U.S. index futures—driven by uncertainty over Trump’s trade policies—also weighed on domestic sentiment. The Nifty slipped 82 points or 0.34% to close at 24,246, while the Sensex dropped 315 points or 0.4% to settle at 79,801.
- Major sectoral indices such as FMCG, Realty, and Auto declined by up to 1.5%. In contrast, the Nifty Pharma Index gained 1% on expectations of strong quarterly earnings. Notably, Natco Pharma and Divi’s Lab surged 7% and 5%, respectively.
- The Nifty FMCG Index fell 1% after Hindustan Unilever and Nestlé reported Q4 results slightly below expectations. Hindustan Unilever dropped 4%, ending at 2,325. The advance-decline ratio for Nifty 500 stocks stood at 2:3, reflecting profit-taking in midcap and small-cap counters.

## Technical Outlook:

- Nifty Index opened slightly negative and traded with high volatility in the initial hour. In the later part of the day Nifty traded sideways in a small range of around 65 points. It took support near 24220 marks and witnessed bounce back in the last hour. It closed the day with a loss of around 80 points.
- It formed a small bodied candle on daily frame with shadow on both the sides indicating buying at lower levels with limited upside. Now till it holds above 24100 zones for an up move towards 24400 then 24600 levels while support can be seen at 24100 and then 24000 level.

## Derivative Outlook:

- Nifty future closed negative with loss of 0.30% at 24375 levels. Positive setup seen in Divis Lab, Dalmia Bharat, Tata Elxsi, RBL Bank, AU Bank, Paytm, Aarti Industries, Inox Wind, Hindustan Zinc, GMR Airports, Apollo tyres, SRF and OFSS while weakness in Voltas, Hindustan Unilever, VBL, Bharat Forge, Biocon, CG Power, AB Capital, Page Industries, Sona coms, Granules and Max Healthcare.
- On option front, Maximum Call OI is at 25000 then 24500 strike while Maximum Put OI is at 24000 then 23500 strike. Call writing is seen at 24800 then 25000 strike while Put writing is seen at 23500 then 24000 strike. Option data suggests a broader trading range in between 23500 to 25000 zones while an immediate range between 23800 to 24700 levels.

# Today's News

- **Samhi Hotels** – Company has partnered with GIC for a hotel investment platform with a planned investment of up to \$300 million. The partnership will start with 5 hotels owned by SAMHI, valued at approximately Rs 2200cr.
- **Axiscades** – Company has appointed Anurag Sharma as CEO of its ADD-Solution division to drive European growth and lead software-driven engineering innovation.
- **AurionPro** – Company's subsidiary, AryaXAI, has launched AI Alignment Labs in Paris and Mumbai to accelerate research in artificial intelligence, focusing on developing aligned AI solutions.
- **Lupin** – Company has received US FDA approval for Tolvaptan Tablets, a medication used to slow kidney function decline in adults with certain kidney diseases.
- **NTPC Green** – Company will consider borrowing up to Rs 5,000cr during FY26 in its upcoming board meeting on April 29.
- **Vascon Engineers** – Company has received a Letter of Intent worth Rs 85.43cr from Yucca Promoters LLP for constructing a commercial building in Pune.
- **Ircon International** – Company as had the contract value for tunnel systems revised to Rs 203cr from Rs 144cr by Indian Railways.
- **Honasa Consumer** – Company has promoted Avinash Dhagat to the position of Chief Supply Chain Officer.
- **Morepen Laboratories Launches New Products** – Company has launched four new products: Ticapen, UdoFix, LycoMore, and Acifix.
- **Ixigo Teams Up With AbhiBus For 2025 T20 Season** – Company has partnered with Chennai Super Kings as the official bus travel partner for the 2025 T20 season.

# Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	24,247	24,216	24,139	24,193	24,270	24,324	24,402	24,348
ADANIANT	2,441	2,425	2,406	2,424	2,443	2,460	2,479	2,461
ADANIAPORTS	1,236	1,232	1,222	1,229	1,239	1,245	1,255	1,248
APOLLOHOSP	7,130	7,094	7,045	7,088	7,136	7,179	7,227	7,185
ASIANPAINT	2,466	2,436	2,409	2,438	2,464	2,493	2,520	2,491
AXISBANK	1,209	1,199	1,188	1,198	1,209	1,219	1,230	1,220
BAJAJ-AUTO	8,215	8,169	8,078	8,147	8,237	8,306	8,396	8,328
BAJAJFINSV	2,103	2,085	2,058	2,081	2,108	2,130	2,158	2,135
BAJFINANCE	9,290	9,273	9,021	9,155	9,408	9,542	9,795	9,660
BEL	305	303	301	303	306	308	311	309
BHARTIARTL	1,846	1,840	1,816	1,831	1,854	1,869	1,893	1,878
CIPLA	1,554	1,525	1,514	1,534	1,545	1,565	1,576	1,556
COALINDIA	400	397	395	397	399	402	404	401
DRREDDY	1,205	1,176	1,163	1,184	1,197	1,218	1,231	1,210
EICHERMOT	5,632	5,620	5,521	5,577	5,676	5,731	5,830	5,775
ETERNAL	237	235	231	234	238	240	244	241
GRASIM	2,731	2,673	2,650	2,690	2,713	2,754	2,777	2,736
HCLTECH	1,590	1,576	1,563	1,577	1,590	1,604	1,617	1,603
HDFCBANK	1,915	1,905	1,896	1,905	1,915	1,924	1,933	1,924
HDFCLIFE	705	705	698	701	709	712	720	716
HEROMOTOCO	3,963	3,925	3,896	3,929	3,959	3,992	4,022	3,988
HINDALCO	628	626	623	625	629	632	635	633
HINDUNILVR	2,324	2,317	2,206	2,265	2,376	2,435	2,546	2,487
ICICIBANK	1,401	1,399	1,385	1,393	1,407	1,415	1,429	1,421
INDUSINDBK	819	793	773	796	817	840	861	838

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
INFY	1,473	1,462	1,451	1,462	1,472	1,483	1,494	1,483
ITC	430	429	425	427	432	434	438	436
JIOFIN	259	257	255	257	258	260	262	260
JSWSTEEL	1,044	1,030	1,022	1,033	1,040	1,051	1,058	1,048
KOTAKBANK	2,218	2,214	2,199	2,209	2,223	2,233	2,247	2,238
LT	3,298	3,280	3,268	3,283	3,295	3,310	3,322	3,307
M&M	2,898	2,865	2,834	2,866	2,897	2,929	2,960	2,928
MARUTI	11,901	11,858	11,751	11,826	11,933	12,008	12,115	12,040
NESTLEIND	2,427	2,379	2,304	2,366	2,440	2,502	2,576	2,515
NTPC	363	362	359	361	364	366	369	366
ONGC	250	248	246	248	250	251	253	251
POWERGRID	314	313	311	313	314	316	317	316
RELIANCE	1,304	1,290	1,285	1,294	1,299	1,309	1,314	1,305
SBILIFE	1,615	1,603	1,585	1,600	1,618	1,633	1,652	1,637
SBIN	812	811	806	809	814	817	822	819
SHRIRAMFIN	699	695	689	694	700	705	711	706
SUNPHARMA	1,807	1,774	1,762	1,785	1,796	1,819	1,830	1,808
TATACONSUM	1,161	1,098	1,072	1,117	1,143	1,187	1,213	1,169
TATAMOTORS	668	660	655	662	666	673	677	671
TATASTEEL	141	140	140	141	141	142	143	142
TCS	3,406	3,388	3,377	3,392	3,402	3,416	3,427	3,413
TECHM	1,447	1,434	1,416	1,431	1,449	1,465	1,483	1,468
TITAN	3,387	3,344	3,324	3,356	3,375	3,407	3,426	3,395
TRENT	5,320	5,256	5,182	5,251	5,325	5,394	5,468	5,399
ULTRACEMCO	12,175	11,870	11,760	11,967	12,078	12,285	12,396	12,188
WIPRO	243	242	239	241	243	245	247	245

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