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8-Oct-25

MOSt Market Roundup

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Market Update

Nifty : 25,046.15 -62.15 (-0.25%) **Sensex : 81,773.66 -153.09 (-0.19%)**

- Equity benchmark Nifty ended slightly lower as investors booked profits after four consecutive sessions of gains, ahead of the release of the U.S. FOMC minutes later today. Market participants also adopted a cautious stance ahead of IT major TCS's quarterly results due tomorrow. Profit booking was seen across sectors such as auto, defence, realty, FMCG, pharma, and financials, which fell up to 1.5%. However, buying interest emerged in technology stocks, with the Nifty IT index rising 1.5%.
- The Nifty slipped 62 points, or 0.2%, to close at 25,046. The advance-decline ratio for Nifty 500 stocks stood at 1:3, reflecting selling pressure in mid- and small-cap segments. IT stocks witnessed renewed buying interest ahead of TCS's Q2 results, with Infosys, TCS, LTI Mindtree, Coforge, and HCL Tech gaining between 1% and 3%.
- In global markets, U.S. indices fell around 0.5% overnight as investors locked in profits after S&P 500 Index sharp 35% rally since April lows. Asian and European markets traded mixed amid cautious sentiment

Technical Outlook:

- Nifty index opened negative and after a slight ray of hope towards 25200 in the first hour, it sunk lower throughout the day. It took some pause near the psychological 25k marks where Nifty found firm footing.
- It formed a small bodied bearish candle with longer shadows on either sides which indicates swings and broke its higher highs – higher lows formation of the last four sessions. Now it has to hold above 25000 zones for an up move towards 25200 then 25350 zones while supports can be seen at 24900 then 24800 zones.

Derivative Outlook:

- Nifty future closed negative with losses of 0.45% at 25112 levels. Positive setup seen in RBL Bank, Titan, National Aluminium, IIFL Finance, SBI Card, Coforge, KEI Industries, Federal bank, BPCL and Bharti Airtel while weakness in RVNL, IRFC, Titaghar Rail System, Oberoi Realty, IREDA, Dabur, NCC, PFC, HUDCO and Tata Motors.
- On option front, Maximum Call OI is at 25200 then 25100 strike while Maximum Put OI is at 25000 then 25100 strike. Call writing is seen at 25200 then 25100 strike while Put writing is seen at 25050 then 25100 strike. Option data suggests a broader trading range in between 24500 to 25500 zones while an immediate range between 24800 to 25300 levels.

Today’s News

- **Data center business to boost Anant Raj’s bottom line in coming years, says chief business officer -** Developer Anant Raj’s data center business marks the company’s strategic diversification from traditional real estate into digital infrastructure. Leveraging its experience in commercial property development, the company is now building high-capacity data centres to meet India’s growing demand for secure, localised IT infrastructure.

- **SML Isuzu's** total production for September rose by 21.6% year-over-year, reaching 1,049 units. The company's total sales in September grew by 17.8% YoY, totalling 812 units.

- **Venus Pipe -** Company approved the allotment of 1.2 lakh equity shares at an issue price of Rs 1,700 per share to warrant holders.

- **JSW Cement -** Company has commissioned vide its subsidiary Shiva cement, a new state-of-the-art cement grinding unit at Sambalpur in Odisha.

- **Utkrash Small Finance -** Company announced right issue at Rs13 a share in the ratio of 8 for 13 held.

- **PN Gadgil Q2 Results update -** Company’s in the second quarter reported a revenue growth of 8.6% to Rs 2,173 crore year-on-year. The festive season continues to remain key drives of growth. The Same Store Sales Growth was up 29% compared to the previous quarter. While the e-Commerce segment contribution to revenue stood at 6.6%.

Global Market Update

- **Asian Market -** Asian stocks fell, driven by losses in technology shares on fresh concerns over the justification for the artificial intelligence boom.

- **European Market -**European stocks gained as gold smashed past $4,000 an ounce for the first time, lifting mining shares. The French CAC 40 gained 0.6% after outgoing Prime Minister Sebastien Lecornu said there’s a shared will to have a budget by the end of the year and he plans to present solutions to President Emmanuel Macron by the end of the day.

- **US Data -** FOMC Meeting Minutes.

- **Commodity -** Oil prices rise in early trading but remain in a narrow range as investors weigh concerns over a looming supply surplus in global markets. Brent crude gain 1% to $66/bbl.

Pivot Table

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
NIFTY 50	25,046	25,009	24,898	24,972	25,082	25,156	25,266	25,193
ADANIENT	2,525	2,500	2,465	2,495	2,530	2,560	2,595	2,565
ADANIPORTS	1,391	1,386	1,371	1,381	1,396	1,406	1,421	1,411
APOLLOHOSP	7,669	7,644	7,573	7,621	7,691	7,739	7,810	7,762
ASIANPAINT	2,323	2,320	2,288	2,306	2,337	2,355	2,387	2,369
AXISBANK	1,180	1,174	1,162	1,171	1,183	1,192	1,204	1,195
BAJAJ-AUTO	8,769	8,751	8,655	8,712	8,808	8,865	8,960	8,903
BAJAJFINSV	2,010	2,005	1,985	1,997	2,018	2,031	2,051	2,038
BAJFINANCE	1,023	1,012	1,005	1,014	1,021	1,030	1,037	1,028
BEL	404	403	397	400	406	409	415	412
BHARTIARTL	1,939	1,928	1,908	1,924	1,943	1,959	1,978	1,963
CIPLA	1,492	1,491	1,472	1,482	1,501	1,511	1,529	1,519
COALINDIA	382	381	378	380	383	385	388	386
DRREDDY	1,235	1,231	1,220	1,227	1,239	1,247	1,259	1,251
EICHERMOT	6,891	6,890	6,812	6,851	6,929	6,969	7,047	7,007
ETERNAL	341	336	333	337	340	344	347	343
GRASIM	2,781	2,765	2,731	2,756	2,790	2,815	2,849	2,823
HCLTECH	1,453	1,427	1,415	1,434	1,446	1,465	1,478	1,459
HDFCBANK	977	975	968	973	979	984	991	986
HDFCLIFE	750	743	736	743	750	757	764	757
HINDALCO	768	766	757	762	772	778	787	782
HINDUNILVR	2,496	2,486	2,463	2,480	2,502	2,519	2,541	2,525
ICICIBANK	1,368	1,364	1,354	1,361	1,371	1,378	1,389	1,382
INDIGO	5,631	5,625	5,588	5,609	5,646	5,668	5,705	5,684
INFY	1,492	1,455	1,439	1,465	1,482	1,508	1,525	1,498

Co. Name	Close	Low	S2	S1	PP	R1	R2	High
ITC	400	398	396	398	400	402	404	402
JIOFIN	305	304	300	302	307	309	313	311
JSWSTEEL	1,146	1,143	1,130	1,138	1,150	1,158	1,170	1,163
KOTAKBANK	2,113	2,112	2,099	2,106	2,119	2,126	2,139	2,133
LT	3,728	3,715	3,689	3,709	3,734	3,754	3,779	3,760
M&M	3,425	3,423	3,365	3,395	3,452	3,482	3,540	3,510
MARUTI	16,014	15,979	15,819	15,917	16,076	16,174	16,333	16,236
MAXHEALTH	1,144	1,128	1,120	1,132	1,140	1,151	1,159	1,147
NESTLEIND	1,177	1,159	1,149	1,163	1,173	1,187	1,197	1,183
NTPC	334	332	328	331	335	338	342	339
ONGC	242	241	238	240	243	245	249	247
POWERGRID	285	285	281	283	287	289	292	290
RELIANCE	1,367	1,365	1,349	1,358	1,374	1,383	1,398	1,389
SBILIFE	1,772	1,758	1,737	1,755	1,775	1,793	1,813	1,796
SBIN	857	857	850	854	861	864	871	868
SHRIRAMFIN	666	662	656	661	667	672	678	673
SUNPHARMA	1,631	1,629	1,612	1,622	1,638	1,648	1,664	1,655
TATACONSUM	1,120	1,110	1,102	1,111	1,119	1,128	1,136	1,127
TATAMOTORS	680	679	664	672	687	695	710	702
TATASTEEL	172	170	168	170	172	174	176	174
TCS	3,032	2,968	2,939	2,985	3,014	3,060	3,089	3,043
TECHM	1,456	1,432	1,413	1,435	1,454	1,475	1,494	1,473
TITAN	3,565	3,460	3,415	3,490	3,535	3,610	3,655	3,580
TRENT	4,624	4,606	4,519	4,572	4,659	4,711	4,798	4,746
ULTRACEMCO	11,980	11,940	11,792	11,886	12,034	12,128	12,276	12,182
WIPRO	244	243	241	242	244	246	248	246

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