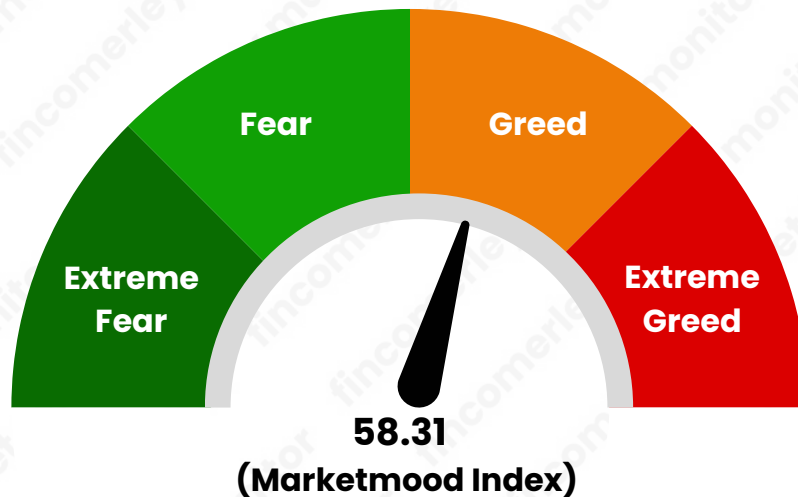


# Market Monitor

## Market Sentiment



- **Extreme Fear**  
Oversold zone (<30) – good time to open positions.
- **Fear (30–50):** Growing concern.  
Rebounding from Extreme Fear? Possible entry.  
Sliding toward it? Better to wait.
- **Greed (50–70):**  
*Rising greed – be cautious with new positions.*  
*Falling from Extreme Greed? Wait for clarity.*
- **Extreme Greed (>70):**  
Overbought zone – avoid new positions.

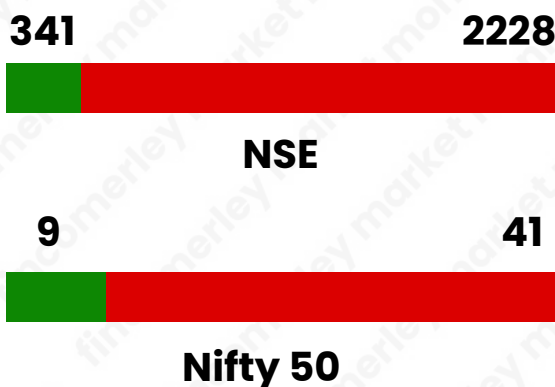
### Weekly Change

**68.77** → **58.31**  
Fear Greed

### Monthly Change

**67.62** → **58.31**  
Fear Greed

## Market Breadth



## FII & DII

11-02-2025	BUY (CR)	SELL (CR)
FII	3540	
DII	2952	
NET	6492	

# Global Indices

As of today at 7.20 am in the morning

Name	LTP	Change	Change%
✔ Gift Nifty	24,264.00	+176.00	+0.73%
⊘ Dow Jones	40,113.50	+0.10	+0.05%
⊘ S&P 500	5,525.21	+40.44	+0.74%
⊘ Nasdaq	17,382.94	+216.90	+1.26%
✔ Hang Seng	21,911.85	-68.89	-0.31%
✔ Nikkie 225	35,940.15	+234.48	+0.66%
⊘ FTSE 100	8,415.25	+7.81	+0.093%
✔ USD / INR	85.3680	+0.0080	+0.01%

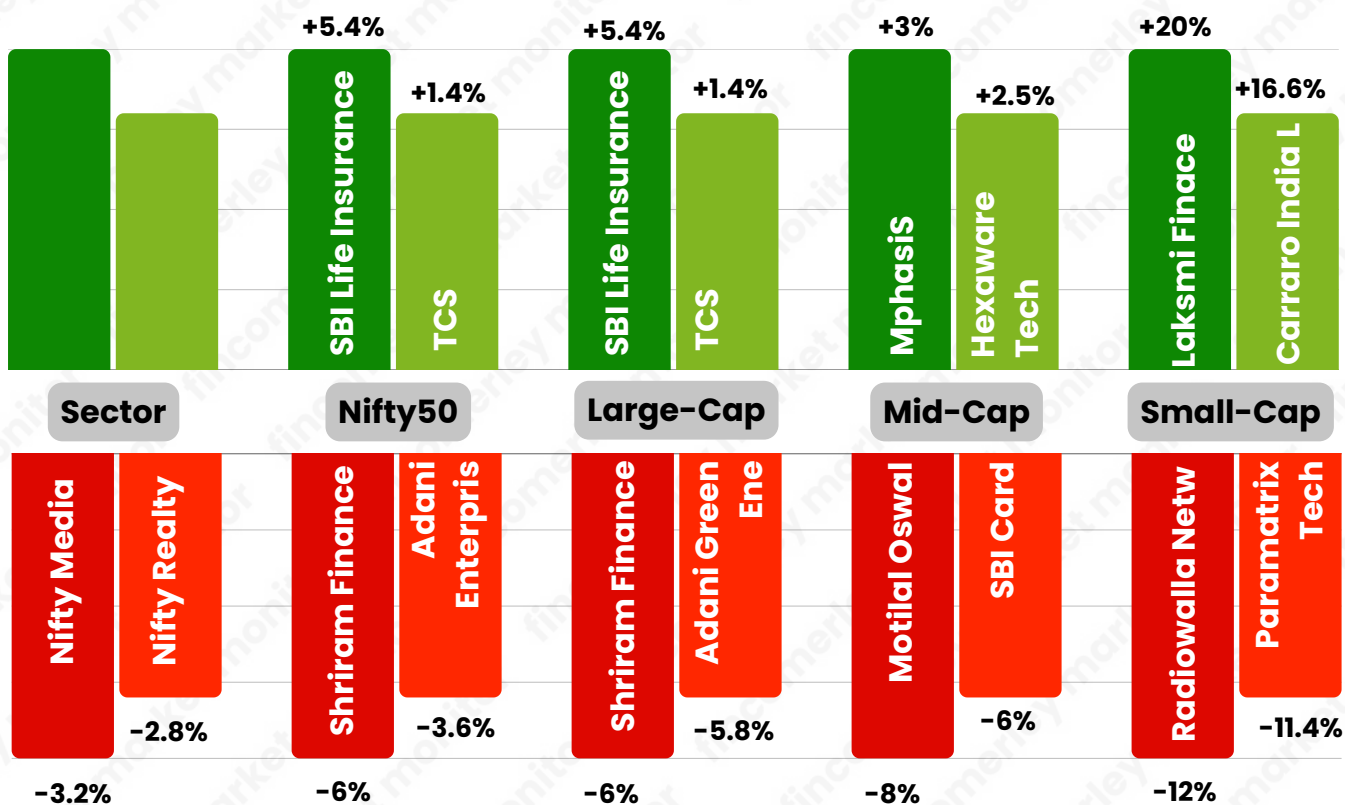
# Indian Indices

As of the most recent trading session.

Name	LTP	Change	Change %
⊘ Nifty 50	24,039.35	-207.35	-0.86%
⊘ Bank Nifty	54,664.05	-537.35	-0.97%
⊘ Sensex	79,212.53	-588.90	-0.74%
⊘ Gold FUT	94,992	-920	-0.96%
⊘ Crude Oil FUT	5,396	+16	+0.30%
⊘ India Vix	17.16	+0.91	+5.58%

✔ Open, Gains    ✔ Open, Losses    ⊘ Closed, Gains    ⊘ Closed, Losses

# Top 2 Performers & Under Performers



## Trending Stocks

### Volume Shockers

- Indian Energy Exchange Ltd.
- Dr. Lal Pathlabs Ltd.
- SBI Life Insurance Company Ltd.
- Jubilant Ingrevia Ltd.
- Cyient Ltd.

### Top 5 High Delivery Stocks

- SKF India Ltd. 90.4%
- Hyundai Motors 86.1%

### 52 Week High

- Navin Fluorine International Ltd.
- Ultratech Cement Ltd.
- JK Cement Ltd.
- Dalmia Bharat Ltd.
- SBFC Finance Ltd.

### Breakout Stocks

- Atul
- Dr Lal PathLab
- Tech Mahindra

Note: Trending stocks selected from the Nifty 500 category.



# Market Summary

- **GIFT Nifty trading more than 100 points higher indicates a gap-up opening for Indian markets.**
- On Friday, Indian markets ended lower, starting the May series on a weak note.
- Sensex dropped 589 points to 79,213, while Nifty fell 207 points to 24,039, slipping below its 200-DMA.
- Nifty Bank lost 537 points, closing at 54,664.
- Midcap Index declined by 1,400 points to 53,570, with broader markets underperforming.
- Nearly ₹9 lakh crore of market capitalisation was wiped out on Friday.
- Nifty Bank gained 0.7% and the Midcap Index rose nearly 2% for the week.
- Sentiment turned cautious after two days of heavy selling.
- US Markets Were Positive on Friday
- All three indexes extended their winning streak to four days and posted weekly gains.
- Dow +0.1% | S&P 500 +0.7% | Nasdaq +1.3%
- 10-year Treasury yield at 4.24% (down from 4.31% Thursday).
- Gold futures down 0.5% to \$3,330 per ounce.
- Crude oil up 0.6% to \$63.20 per barrel.
- Asian markets are trading mixed on Monday morning.



# Key Pre-Market Updates

On Friday, April 25, 2025, **India VIX** rose by 5.58% to close at 17.16. This marked the third consecutive day of gains. The steady rise in VIX over the past three days signals increasing nervousness and volatility in the market.

## Events

The government is set to release the March quick estimates for the **Index of Industrial Production (IIP)**. According to Bloomberg, factory activity is expected to grow by 3.3%. For February, IIP growth stood at 2.9%, while January recorded a 5% increase.

# Technical Analysis

## NIFTY 50

On Friday, Nifty 50 formed a high volatile candle with a lower wick, showing selling pressure and some buying at lower levels. It stayed between 23,850 and 24,365. Breaking this range could set the next move. The index still trades above key moving averages, keeping the broader trend positive. However, daily and weekly candles show weakness and selling from higher levels. Momentum indicators remain mixed.

### Key Resistance Levels

- **Pivot Points:**  
55,179, 55,456, and 55,905
- **Fibonacci Retracement:**  
24,282, 24,404 and 24,602

### Key Support Levels

- **Pivot Points:**  
54,282, 54,005, and 53,556
- **Fibonacci Retracement:**  
23,856 ,23,764 and 23,566

## Nifty Call Option Data (Weekly)

### Key resistance levels

- **Open interest:** 25,000 strike (1.04 Crore contracts)
- **Call writing:** 24,500 strike (addition of 49.88 lakh contracts)
- **Call unwinding:** 23,300 strike (shed 34,950 contracts)

## Nifty Put Option Data (Weekly)

### Key support levels

- **Open interest:** 23,500 strike (67.08 lakh contracts)
- **Put writing:** 23,500 strike (addition of 29.65 lakh contracts)
- **Put unwinding:** 24,200 strike (shed 8.99 lakh contracts)



## NIFTY BANK

Bank Nifty formed a bearish candle with a lower wick on Friday, showing buying interest at lower levels and underlying strength. It continued the lower highs–lower lows pattern for another session. On the weekly chart, it formed a bearish candle with an upper wick but stayed above last week's low, indicating that overall strength is still intact. The index also holds above all key moving averages, which continue to trend upward.

### Key Resistance Levels

- **Pivot Points:**  
55,179, 55,456, and 55,905
- **Fibonacci Retracement:**  
50,380, 51,149

### Key Support Levels

- **Pivot Points:**  
54,282, 54,005, and 53,556
- **Fibonacci Retracement:**  
50,380, 51,149

## Bank Nifty call option data (Monthly)

### Key resistance levels

- **Open interest:** 53,000 strike (9.93 lakh contracts)
- **Call writing:** 53,500 strike (addition of 4.41 lakh contracts)
- **Call unwinding:** 53,000 strike (shed 3 lakh contracts)

## Bank Nifty put option data (Monthly)

### Key support levels

- **Open interest:** 53,000 strike (15.34 lakh contracts)
- **Put writing:** 53,500 strike (added 4.83 lakh contracts)
- **Put unwinding:** 53,000 strike (shed 1.97 lakh contracts)



# Stocks in News



- **Hindustan Zinc Plans** Entry into Potash Mining; Eyes Lithium Potential in Rajasthan Block.
- **Mahindra & Mahindra** will acquire a majority stake in SML Isuzu for ₹555 crore and plans an open offer for 26% more shares.
- **Dixon Technologies'** unit IsmartU India will acquire KHY Electronics for ₹121 crore.
- **GAIL** signed an MoU with Container Corp. to explore LNG as an alternative fuel.
- **Aditya Birla Sun Life** plans to raise ₹950 crore through bonds and shares.
- **Sundaram Finance Holdings** completed a 24.16% stake acquisition in Axles India, making it a subsidiary.
- **Alembic Pharma** invested ₹205 crore to set up a new manufacturing facility in Madhya Pradesh.
- **Biocon** received European approval for its subsidiary's Denosumab biosimilars for treating bone loss in women.
- **Zydus Life** successfully cleared a USFDA inspection at a Gujarat plant with no critical data integrity issues.
- **Indian Overseas Bank** will meet on May 2 to discuss a fundraising plan for FY26.
- **Swiggy** signed an MoU with the Ministry of Cooperation to onboard dairy and other cooperative products.
- **Apollo Tyres'** Netherlands unit plans to shut its Enschede plant operations by summer 2026.





# Stocks in News



- **NRB Bearings** plans to invest around Rs 200 crore over the next two years to boost its manufacturing and R&D facilities. The focus will be on expanding capacities for various types of bearings.
- **RailTel Corporation of India** has secured a work order worth Rs 90.08 crore from the Institute of Road Transport.

# Quick Earnings Highlights

## Good

- Reliance industries
- Reliance jio
- DCB Bank
- Rossari Biotech
- Oracle Financial Service
- Force Motors
- Mahindra Holidays
- L&T Finance
- Zensar Tech
- MRPL
- SBFC

## Neutral

- Tata technologies
- RBL Bank
- Idfc first Bank
- Poonawala Fincorp
- Tejas Networks
- Bhansali Engineering
- Avantel
- India Cements

## BAD

- Lloyds Metals and Energy

Note: This classification is based on a standard evaluation of key financial metrics such as revenue, EBITDA, profit or loss, and margins. The companies listed above announced their results after market hours.

## Today's IPO Highlights

### **Ongoing** (Opens Today)

Ather Energy Ltd.

Iware Supplychain Services Ltd.

## F&O Updates

**Stocks Under F&O Ban:** Nil



## Corporate Actions

<b>Bonus</b>	
<b>Dividend</b>	<b>HCL Technologies Ltd.</b>
<b>Split</b>	
<b>Rights</b>	<b>GACM Technologies Ltd. Lloyds Engineering Works Ltd.</b>

## Results Today

**UltraTech Cement, Adani Green Energy, Adani Total Gas, IRCTC, TVS Motor Company, Oberoi Realty, Castrol India, IDBI Bank, KPIT Technologies, PNB Housing Finance, CSB Bank, Go Digit General Insurance, Hexaware Technologies, KFin Technologies, Nippon Life India Asset Management, Firstsource Solutions, Fino Payments Bank, UCO Bank, TVS Holdings, Shriram Asset Management, Aditya Birla Sun Life AMC, Indegene, Hatsun Agro Product, AWL Agri Business, Sanghi Industries.**

**"In trading, it's not about being right; it's about making money when you are right and losing little when you are wrong."**

**– George Soros**

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