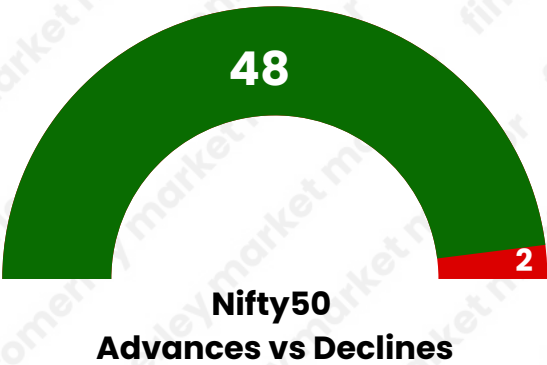




Wed,16 April 2025

Market Sentiment



MMI Weekly Change : 69.85 → 58.38

Greed (50–70) suggests rising greed. If MMI is moving from Neutral to Greed, be cautious before opening new positions. If MMI is dropping from Extreme Greed, wait for more clarity before seeking new opportunities.

India Vix

India VIX fell nearly 20% to close at 16.12 on Tuesday, signaling lower fear in the market. Analysts say the easing of nerves was due to improving sentiment and stability, supported by Trump’s tariff exemption announcement.

FII

FIIs turned buyers after 9 consecutive sessions of selling, with a strong net buy of **₹6,065.78 crore**.

DII

DIIs, who were buyers for the past 4 days, turned sellers on the 5th day, with a net sell of **₹1,951.60 crore**.



Global Indices

As of today at 7.20 am in the morning

| Name | LTP | Change | Change% |
|--------------|-----------|---------|---------|
| ✔ Gift Nifty | 23,280.00 | -104.50 | -0.45% |
| ✘ Dow Jones | 40,368.96 | -155.83 | -0.38% |
| ✘ S&P 500 | 5,396.63 | -9.34 | -0.17% |
| ✘ Nasdaq | 16,823.17 | -8.31 | -0.05% |
| ✘ Hang Seng | 21,252.41 | -213.87 | -1.00% |
| ✔ Nikkie 225 | 34,138 | -317 | -0.92% |
| ○ FTSE 100 | 8,249.12 | +114.78 | +1.39% |
| ✔ USD / INR | 85.7220 | +0.0590 | +0.07% |

Indian Indices

As of the most recent trading session.

| Name | LTP | Change | Change % |
|-----------------|-----------|-----------|----------|
| ○ Nifty 50 | 23,328.55 | +500.00 | +2.19% |
| ○ Bank Nifty | 52,379.50 | +1,377.15 | +2.70% |
| ○ Sensex | 76,734.89 | +1577.63 | +2.10% |
| ○ Gold FUT | 93,451 | +199 | +0.21% |
| ○ Crude Oil FUT | 5,266 | +2.0 | +0.04% |

✔ Open, Gains ✘ Open, Losses ○ Closed, Gains ✘ Closed, Losses

Market Summary



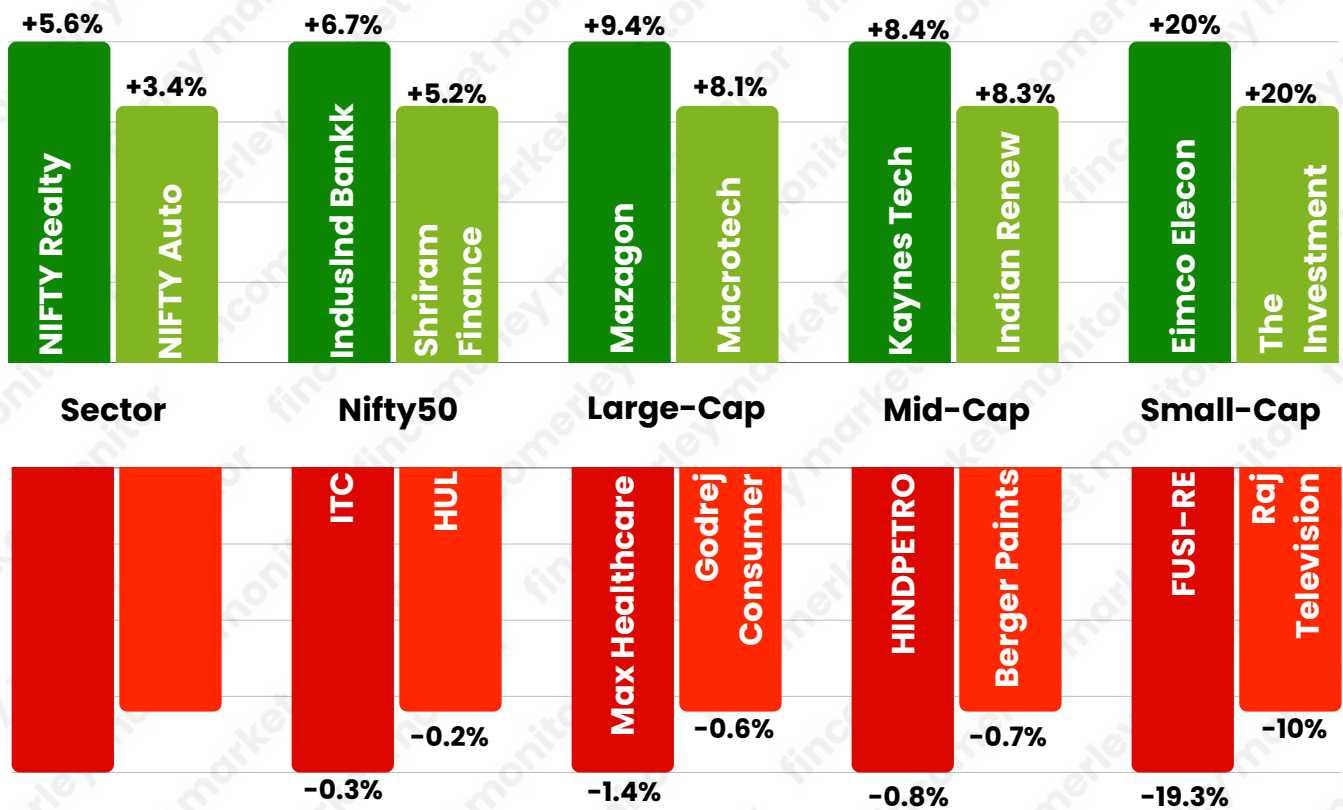
- **GIFT Nifty trading more than 100 points down indicates a gap-down opening for Indian indices.**
- On Tuesday, Indian markets bounced back sharply, erasing last week's losses.
- Nifty climbed 502 points to 23,329, while Sensex jumped 1,578 points to 76,735.
- Nifty Bank surged 1,377 points, ending at 52,380.
- All 13 sectoral indices closed in the green, with 49 of 50 Nifty stocks ending higher.
- Midcap and smallcap indices rose over 3% and 2.5% respectively.
- Investor wealth rose by ₹11 lakh crore in a single day, with BSE market cap at ₹412 lakh crore.
- US Markets Closed Lower Tuesday After Quiet Trading Day
- Markets dipped slightly as calm returned despite ongoing US-China trade tensions.
- Dow -0.4% | S&P 500 -0.2% | Nasdaq -0.1%
- Boeing fell 2% after reports China halted new aircraft deliveries.
- Investors digested recent tariff exemptions on semiconductors and electronics.
- 10-year Treasury yield dropped to 4.34%.
- Gold up 0.6% to \$3,247/oz | Crude oil flat at \$61.50/barrel
- Bitcoin slipped to \$84,000 after early highs above \$86,000
- Major Asian markets are trading in negative territory on Wednesday morning.



Key Pre – Market Updates

- **India's retail inflation** Fell to its lowest level since August 2019, mainly due to cheaper vegetables. In March, inflation eased to 3.34%, down from 3.61% in February, as per government data.
- **India's trade deficit** widened to \$21.54 billion in March, up from \$14.05 billion in February, as per Commerce Ministry data. Exports rose slightly by 0.7% to \$41.97 billion, while imports jumped 11.3% to \$63.51 billion.
- India is expected to get **above-normal rainfall this monsoon**, the weather department said on Tuesday. El Nino is not likely to affect the season. Most areas, except parts of the northeast, may see normal to above-normal rain.
- **India's wholesale inflation** stood at 2.05% in March, down from 2.38% in February. Prices of primary articles, especially food, eased, but manufactured goods saw a rise in prices during the month.
- **Indian markets bounced back** strongly, recovering earlier losses caused by US President Donald Trump's tariff move. The rebound came as trading resumed after a long weekend.
- **Airbus** plans to purchase parts worth \$2 billion from India every year, boosting its sourcing from the country.

Top 2 Performers & Under Performers



Trending Stocks

Volume Shockers

- Sai Life Sciences Ltd.
- Data Patterns (India) Ltd.
- Intellect Design Arena Ltd.
- KEC International Ltd.
- DOMS Industries Ltd.

Top 5 High Delivery Stocks

- Sundram Fasteners Ltd. **90.3%**
- Hyundai Motor India Ltd. **81.0%**
- Apollo Hospitals Enterprise Ltd. **77.8%**
- Crompton Greaves Consumer Electricals Ltd. **76.8%**
- NTPC Ltd. **76.2%**

Note: Trending stocks selected from the Nifty 500 category.

Technical Analysis

NIFTY 50

The Nifty 50 ended the day with a small red candle and a long lower shadow on the daily chart, which suggests the ongoing uptrend may continue. During the session, the index briefly dipped to touch the 100-day and 200-day exponential moving averages (EMAs) but managed to close above the 20-day and 50-day EMAs. It's now approaching the 78.6% Fibonacci retracement level, calculated from the March high to the April low. The RSI (Relative Strength Index) is at 55.97 and has shown a bullish crossover, indicating strengthening momentum.

Key Resistance Levels

- **Pivot Points:**
23,363, 23,401, and 23,463

Key Support Levels

- **Pivot Points:**
23,240, 23,201, and 23,140

Nifty Call Option Data (Monthly)

Key Resistance Levels

- **Open interest:** 24,000 strike (with 1.08 crore contracts)
- **Call writing:** 23,300 strike (addition of 61.08 lakh contracts)
- **Call unwinding:** 23,000 strike (shed 17.08 lakh contracts)

Nifty Put Option Data (Monthly)

Key Support Levels

- **Open interest:** 23,300 strike (with 97.04 lakh contracts)
- **Put writing:** 23,300 strike (addition of 94.89 lakh contracts)
- **Put unwinding:** 24,300 strike (shed 7,275 contracts)

NIFTY BANK

Bank Nifty formed a small green candle with a long lower shadow on the daily chart after opening with a strong gap-up, suggesting the uptrend is likely to continue. The index jumped 2.7% on higher-than-usual trading volume and is now nearing the upper band of the Bollinger Bands. Momentum indicators like RSI, MACD, and Stochastic RSI all showed positive crossovers, signaling further strength.

Key Resistance Levels

- **Pivot Points:**
52,481, 52,628, and 52,866
- **Fibonacci Retracement:**
53,014, 54,467

Key Support Levels

- **Pivot Points:**
52,005, 51,858, and 51,620
- **Fibonacci Retracement:**
51,260, 50,272

Bank Nifty call option data (Monthly)

Key Resistance Levels

- **Open interest:** 54,000 strike (with 14.43 lakh contracts)
- **Call writing:** 52,300 strike (addition of 1.92 lakh contracts)
- **Call unwinding:** 51,500 strike (shed 3.42 lakh contracts)

Bank Nifty put option data (Monthly)

Key Support Levels

- **Open interest:** 50,000 strike (with 11.05 lakh contracts)
- **Put writing:** 52,000 strike (addition of 5.36 lakh contracts)
- **Put unwinding:** 54,000 strike (shed 39,810 contracts)



- **Vedanta**'s oil and gas unit won seven new blocks in the OALP Round IX auction, increasing its total to 69 blocks across 73,000 square kilometers.
- **Oil India** added nine blocks in the same auction, expanding its exploration area by over 51,000 square kilometers.
- **NHPC** started commercial operations at Unit-IV (200 MW) of the Parbati-II project in Himachal Pradesh
- **Landmark Cars** posted a 17.3% yearly growth in revenue, reaching Rs 1,525 crore. Vehicle sales rose 21.1% to Rs 1,257 crore.
- **Dabur India** will set up a new company in the UK through its international arm.
- **Blue Dart Express** improved its reach in Northeast India by adding Guwahati as a direct flying destination.
- **Axis Bank** plans to explore fundraising options through equity and debt on April 24.
- **Sanofi India** confirmed it has no plans to sell or license its insulin brand Lantus.
- **Indraprastha Gas** will see a 20% cut in domestic gas supply starting April 16. It will receive new well gas at 125% of the shortfall, priced at 12% of the Indian crude basket.
- **Mahanagar Gas** faced an 18% cut in APM gas supply from April 16. The shortfall has been replaced with new well gas, which could hurt profitability.

Stocks in News



- **IndusInd Bank** reported a financial impact of Rs 1,979 crore from derivative accounting issues. The bank will reflect this in its FY25 results.
- **SEBI** has barred **Gensol Engineering**'s promoters from key roles due to alleged fund diversion and record falsification. The company's stock split has also been halted.

Quick Earnings Highlights

Good

- ICICI Prudential Life Insurance
- IREDA

Neutral

- ICICI Lombard General Insurance Co



F & O

Stocks Under F&O ban:

Birlasoft, Hindustan Copper, Manappuram Finance,
National Aluminium Company

Corporate Actions

Dividend

Mazagon dock

Price Band Revisions

From **20%** to **5%** : Dish TV

Results Today

Wipro, Angel One, Waaree Renewable Technologies, Swaraj Engines,
Cellecor Gadgets, GTPL Hathway, Reliance Industrial Infrastructure, Laxmi
Goldorna House, Lagnam Spintex, Ind Cement Cap, Infomedia Press,
Heera Ispat



– "The biggest risk is not taking any risk."

– Mark Zuckerberg

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