

# Friday, 27th June'25

**Gold**

Current Value

**97,050.00****Crude Oil**

Current Value

**5,620.00****US VIX**

Current Value

**16.44****India VIX**

Current Value

**12.59**

India VIX measures market volatility based on Nifty options. A higher value indicates more expected market fluctuations, while a lower value suggests stability.

## Market Sentiment

**60.55****Greed** 😊

- **Extreme Fear (<30):** Good time to open positions
- **Fear (30-50):** Wait for market direction
- **Greed (50-70):** Be cautious with new positions
- **Extreme Greed (>70):** Avoid opening positions

# Today's Market Overview

Indian indices were mixed. Asian peers showed slight recovery. US markets remain resilient on strong tech earnings.

## NIFTY

Current Value

**25549**



## BankNifty

Current Value

**57,206.70**



## Indian Indices

| Index        | Change %      |
|--------------|---------------|
| Nifty Bank   | +1.03%        |
| Sensex       | +1.21%        |
| <b>NIFTY</b> | <b>+1.21%</b> |
| -            | -             |
| -            | -             |



## Asian Markets

| Index     | Change % |
|-----------|----------|
| HANG SENG | -0.61%   |
| KOSPI     | -0.16%   |
| -         | -        |
| -         | -        |
| -         | -        |



## US Markets

| Index       | Change % |
|-------------|----------|
| Dow Futures | +0.16%   |
| Dow         | +0.94%   |
| S&P         | +0.02%   |
| -           | -        |
| -           | -        |



## Europe Markets

| Index    | Change % |
|----------|----------|
| DAX      | +0.64%   |
| CAC      | -0.76%   |
| FTSE 100 | +0.19%   |
| -        | -        |
| -        | -        |

# Snapshot



## Top Gainer

| Company Name                | Change % |
|-----------------------------|----------|
| Brainbees Solutions...      | +17%     |
| Jai Balaji Industries...    | +12.12%  |
| Lloyds Engineering Works... | +8.56%   |
| Apar Industries             | +7.29%   |
| Raymond Lifestyle           | +5.99%   |



## Top Losers

| Company Name                  | Change % |
|-------------------------------|----------|
| Infibeam Avenues              | -7.7%    |
| Fertilisers & Chemicals Tr... | -6.95%   |
| Sharda Cropchem               | -4.88%   |
| Enviro Infra Engineers...     | -4.78%   |
| Endurance Technologies (CN... | -4.55%   |

## Volume Shockers

| Company Name  | Price   |
|---------------|---------|
| Adani Power   | ₹578.15 |
| I O C L       | ₹146.28 |
| Jio Financial | ₹312.50 |
| Vedanta       | ₹455.50 |
| B P C L       | ₹329.75 |

## 52 Week High

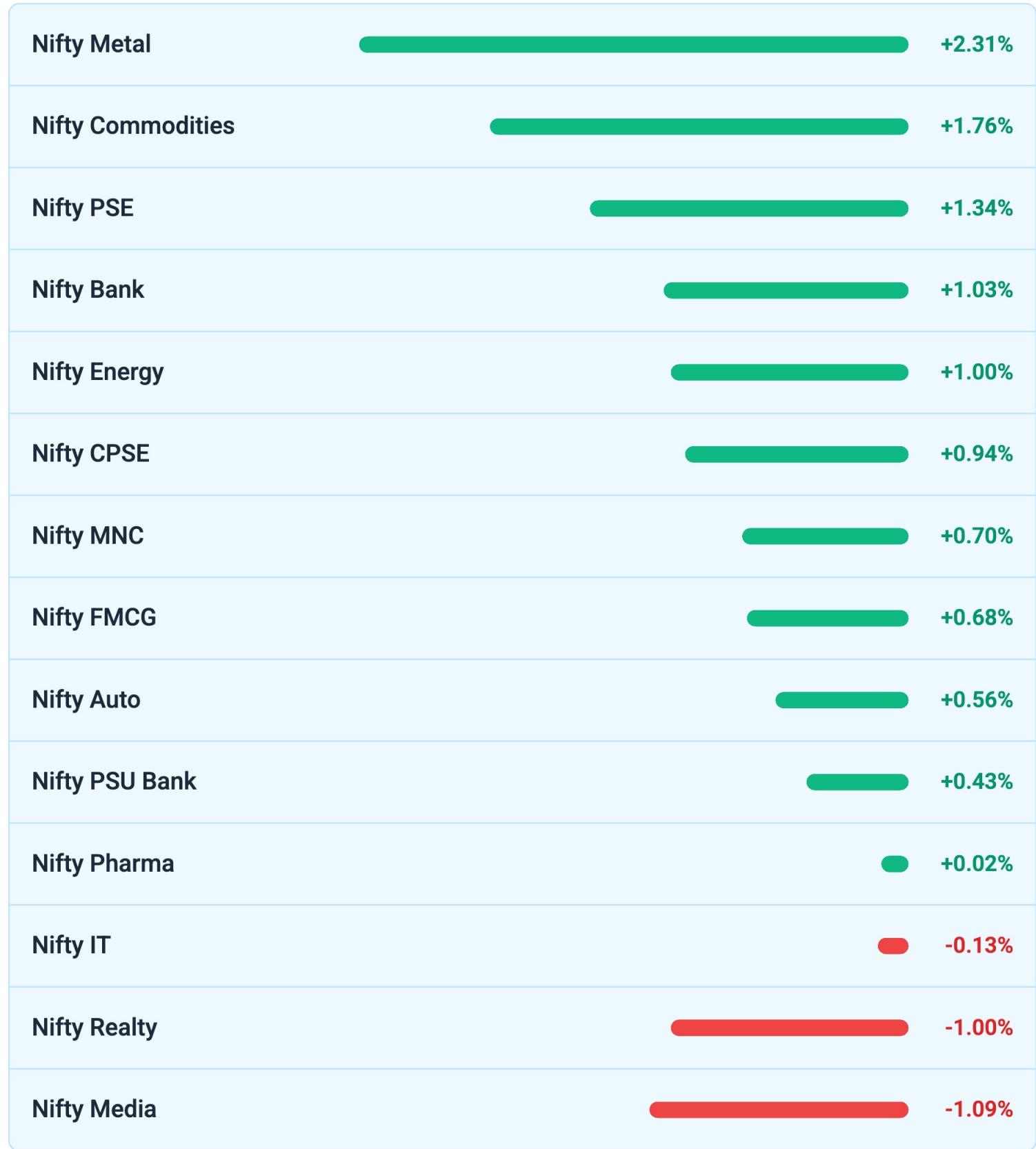
| Company Name              | Price      |
|---------------------------|------------|
| Max Financial Services... | ₹1,634.30  |
| Gillette India            | ₹10,780.50 |
| Bharti Airtel             | ₹2,014.30  |
| Dalmia Bharat             | ₹2,191.80  |
| L&T Finance               | ₹206.14    |

Volume above 1.5 times weekly average and minimum 5,000 for Nifty 500 stocks

Day's high equal to or above yearly high for Nifty 500 stocks

# Snapshot

 1 Day Change



# Snapshot



7 Day Change

|                   |   |        |
|-------------------|---|--------|
| Nifty Metal       |     | +5.58% |
| Nifty Media       |     | +4.49% |
| Nifty Commodities |     | +4.19% |
| Nifty PSU Bank    |     | +3.69% |
| Nifty Bank        |     | +2.93% |
| Nifty PSE         |   | +2.77% |
| Nifty Energy      |   | +2.57% |
| Nifty MNC         |  | +2.41% |
| Nifty Auto        |  | +2.25% |
| Nifty Pharma      |  | +1.71% |
| Nifty Realty      |  | +1.69% |
| Nifty CPSE        |  | +1.65% |
| Nifty FMCG        |  | +1.54% |
| Nifty IT          |  | +0.86% |

# Futures & Options

## Long Buildup

| Company Name        | OI Change % |
|---------------------|-------------|
| Union Bank of India | +14.63%     |
| Blue Star Ltd.      | +27.54%     |

## Short Buildup

| Company Name           | OI Change % |
|------------------------|-------------|
| Indraprastha Gas Ltd.  | +10.68%     |
| KPIT Technologies Ltd. | +6.01%      |

## Most Active Contracts - Index Future

| Company Name | Price      | Change % | Prev. Close | Volume | OI      |
|--------------|------------|----------|-------------|--------|---------|
| NIFTY        | ₹25,554.70 | +1.20%   | ₹25,252.20  | 75945  | 4190625 |
| BANKNIFTY    | ₹57,215.20 | +1.05%   | ₹56,619.20  | 43250  | 727290  |
| MIDCPNIFTY   | ₹13,307.00 | +0.52%   | ₹13,238.25  | 9002   | 374640  |
| FINNIFTY     | ₹27,246.90 | +1.50%   | ₹26,845.40  | 1030   | 32500   |
| NIFTYNXT50   | ₹68,299.00 | +0.88%   | ₹67,703.60  | 520    | 3800    |



## Most Active Contracts - Index Option

| Script Name    | Price   | Change % | Prev. Close | Volume   | OI       |
|----------------|---------|----------|-------------|----------|----------|
| NIFTY 25550 CE | ₹0.05   | -99.21%  | ₹6.35       | 20575122 | 11375400 |
| NIFTY 25500 CE | ₹49.15  | +406.70% | ₹9.70       | 17904142 | 5895525  |
| NIFTY 25600 CE | ₹0.05   | -98.81%  | ₹4.20       | 15963183 | 8375325  |
| NIFTY 25300 PE | ₹0.15   | -99.84%  | ₹95.75      | 10849680 | 7169325  |
| NIFTY 25400 CE | ₹149.60 | +648.00% | ₹20.00      | 10767178 | 2295600  |



## Most Active Contracts - Stock Futures

| Company Name | Price     | Change % | Prev. Close | Volume | OI        |
|--------------|-----------|----------|-------------|--------|-----------|
| RELIANCE     | ₹1,492.90 | +1.78%   | ₹1,466.80   | 40675  | 8079500   |
| HDFCBANK     | ₹2,014.40 | +1.74%   | ₹1,980.00   | 34505  | 7794050   |
| TATAMOTORS   | ₹681.50   | +0.90%   | ₹675.40     | 33995  | 3685000   |
| SBIN         | ₹796.80   | -0.53%   | ₹801.05     | 31388  | 9942750   |
| IDEA         | ₹7.22     | +0.98%   | ₹7.15       | 28848  | 126440000 |



## Most Active Contracts - Stock Options

| Script Name       | Price  | Change %  | Prev. Close | Volume | OI      |
|-------------------|--------|-----------|-------------|--------|---------|
| HDFCBANK 2000 CE  | ₹16.00 | +2566.67% | ₹0.60       | 31707  | 2305050 |
| SHREECEM 31000 CE | ₹0.05  | -96.88%   | ₹1.60       | 20908  | 15150   |
| DIXON 14000 PE    | ₹0.05  | -99.82%   | ₹27.45      | 20273  | 116850  |
| SHREECEM 30500 CE | ₹0.05  | -96.15%   | ₹1.30       | 18259  | 5275    |
| DIXON 14500 CE    | ₹0.05  | -99.87%   | ₹37.75      | 16583  | 99850   |

# Nifty 50 25549 1.21%

## Pivot levels

| Type      | R3       | R2       | R1       | PP       | S1       | S2       | S3       |
|-----------|----------|----------|----------|----------|----------|----------|----------|
| Standard  | 25961.63 | 25763.47 | 25656.23 | 25458.07 | 25350.83 | 25152.67 | 25045.43 |
| Fibonacci | 25763.47 | 25646.80 | 25574.73 | 25458.07 | 25341.40 | 25269.33 | 25152.67 |

## Advance / Decline

41

8

### Top 3 Gainers

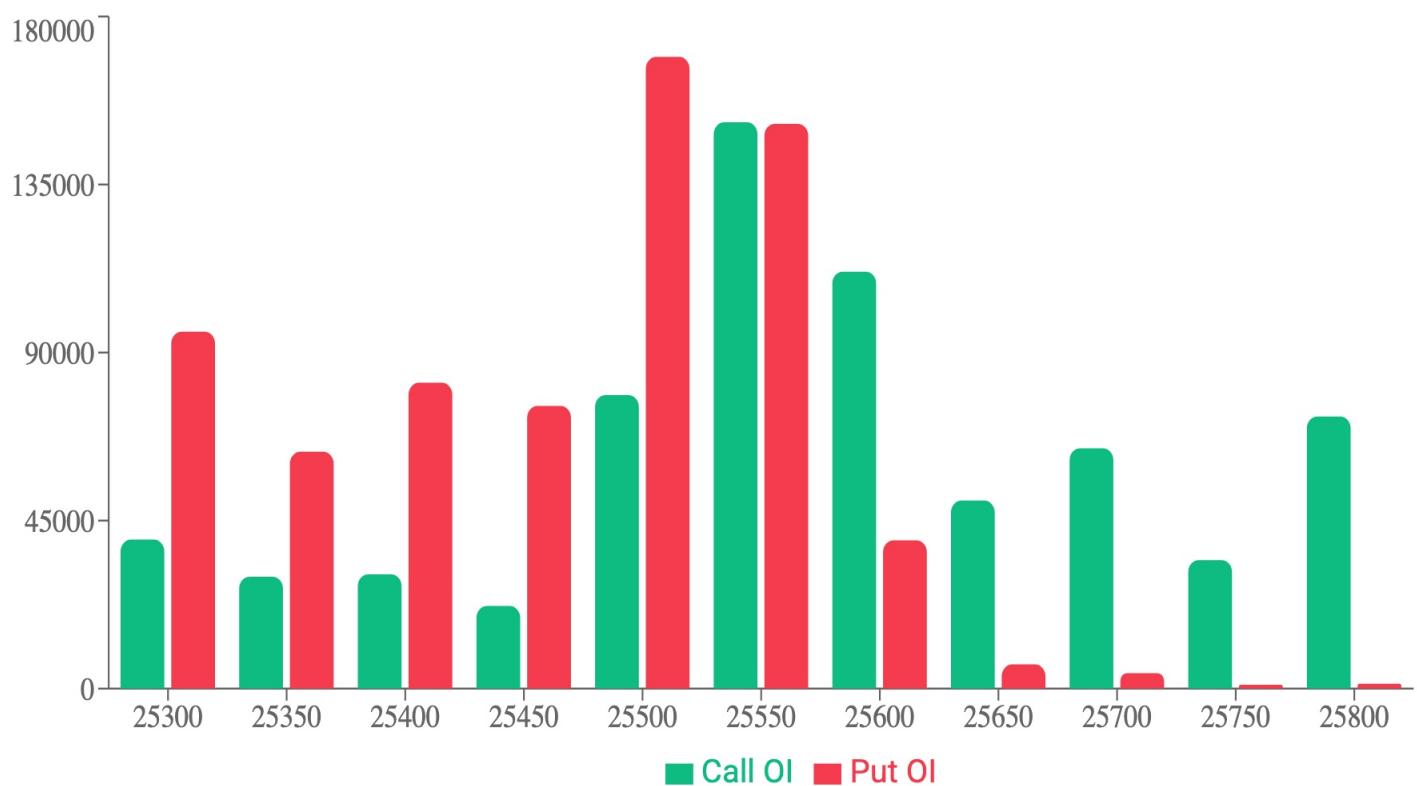
| Company Name    | Change % |
|-----------------|----------|
| Shriram Finance | +4.2%    |
| Jio Financial   | +3%      |
| Hindalco Inds.  | +2.7%    |

### Top 3 Losers

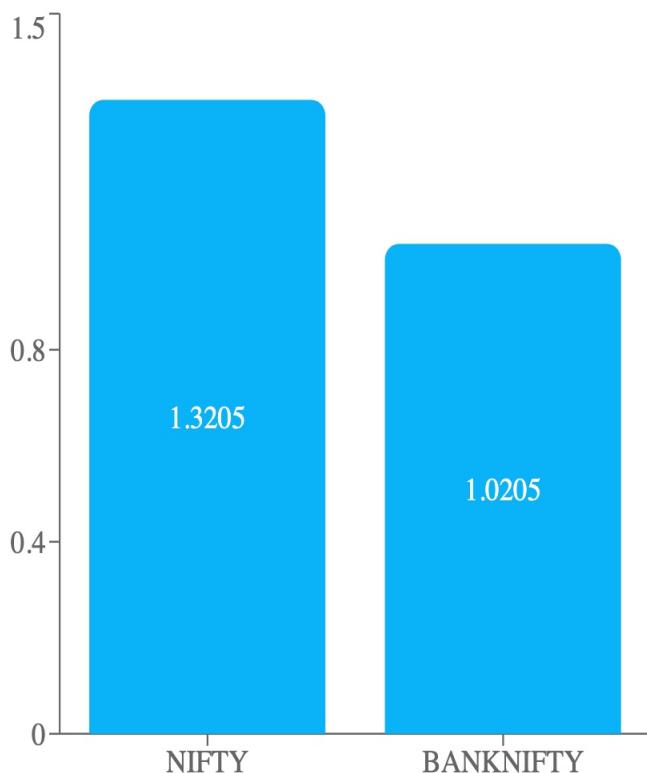
| Company Name   | Change % |
|----------------|----------|
| Dr Reddys Labs | -1.5%    |
| Tech Mahindra  | -0.9%    |
| Hero Motocorp  | -0.5%    |



## Weekly Option Chain - Nifty 50



## Weekly PCR - Nifty 50



A PCR above 1 indicates that the put volume has exceeded the call volume. It indicates an increase in the bearish sentiment.

A PCR below 1 indicates that the call volume exceeds the put volume. It signifies a bullish market ahead.

It's important to look at the overall trend of the PCR to see how the market sentiment is changing.

# Bank Nifty 57,206.70 +1.03%



## Pivot levels

| Type      | R3       | R2       | R1       | PP       | S1       | S2       | S3       |
|-----------|----------|----------|----------|----------|----------|----------|----------|
| Standard  | 58165.60 | 57714.50 | 57460.60 | 57009.50 | 56755.60 | 56304.50 | 56050.60 |
| Fibonacci | 57714.50 | 57445.19 | 57278.81 | 57009.50 | 56740.19 | 56573.81 | 56304.50 |



## Advance / Decline

9

3

### Top 3 Gainers

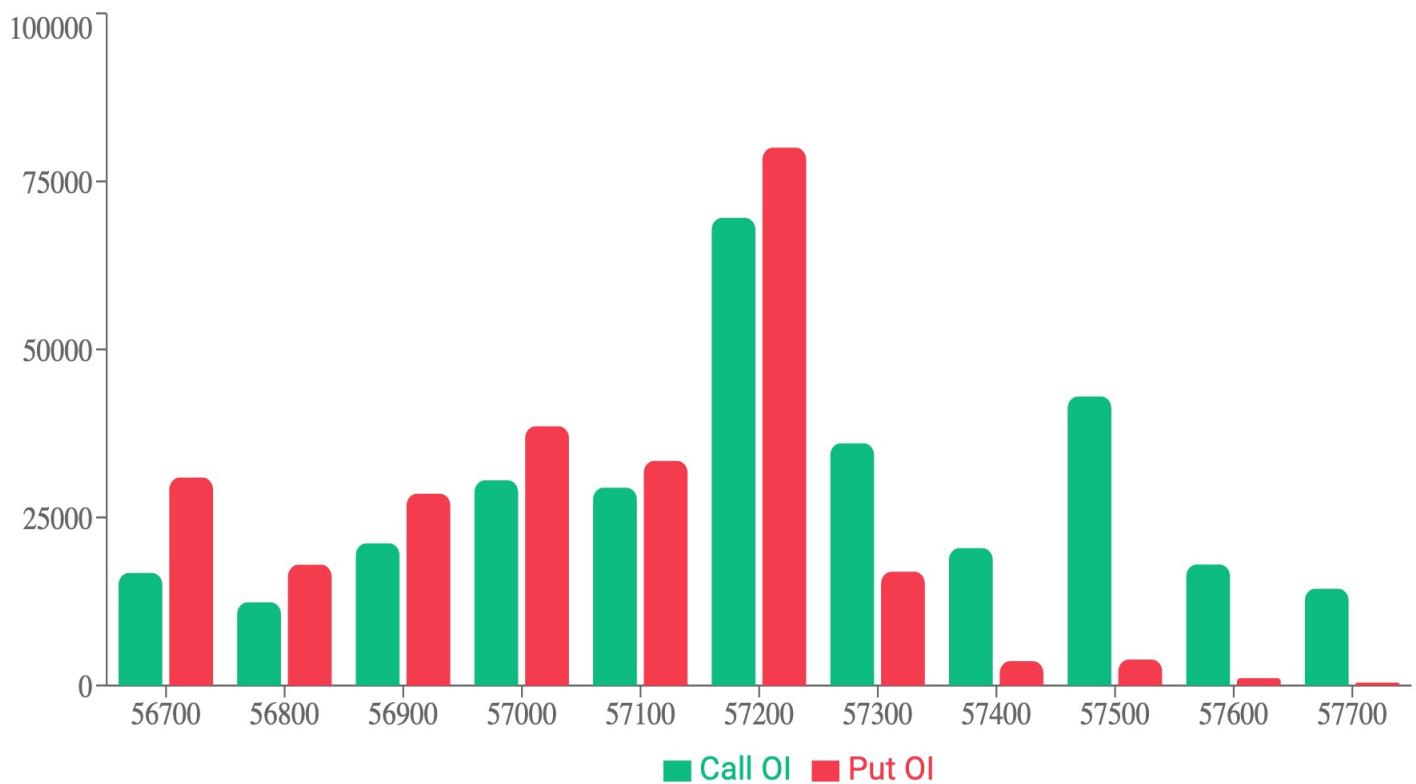
| Company Name     | Change % |
|------------------|----------|
| HDFC Bank        | +2.1%    |
| Axis Bank        | +1.7%    |
| AU Small Finance | +1.6%    |

### Top 3 Losers

| Company Name    | Change % |
|-----------------|----------|
| St Bk of India  | -0.4%    |
| IDFC First Bank | -0.3%    |
| Federal Bank    | -0.2%    |



## Weekly Option Chain - Bank Nifty



- High Call OI = potential resistance; High Put OI = potential support
- Increasing Call OI = bearish; Decreasing Call OI = bullish
- Increasing Put OI = bullish; Decreasing Put OI = bearish

# Top 10 Stocks in News

## 1. Nestle India *Source: Business Standard*

Crisis is the new normal: Nestle India's outgoing CMD to successor

## 2. New India Assurance Company *Source: CNBC TV18*

New India Assurance gets ₹2,298 crore GST show cause notice

## 3. HDFC Bank *Source: Zee Business*

HDFC Bank, Bharti Airtel, other stocks stocks that hit record highs on Thursday and why investors may want to take notice

## 4. Tracxn Technologies *Source: Financial Express*

Noida-based drone startup secures \$100-million funding

## 5. Steel Authority of India *Source: The Hindu*

Centre to set up high-level panel to examine displacement concerns in Rourkela rail project

## 6. Tata Power Company *Source: Business Standard*

Tata Power applies to expand electricity distribution in Maharashtra

## 7. Canara Bank *Source: The Indian Express*

Mid-day meal staff to get Rs 16 lakh insurance cover: Punjab education minister

## 8. Nykaa - FSN E-Commerce Ventures Ltd. *Source: The Economic Times*

Nykaa eyes Rs 6,000 crore GMV from in-house brands by FY30, ramps up fashion and AI bets

## 9. Bharti Airtel *Source: News18*

Airtel faces Rs 6.48-lakh penalty for subscriber verification rule violation

## 10. BEML *Source: News18*

BEML lays foundation for central warehousing centre in Bilaspur

# Institutional Activity

## ₹ FII & DII Activity

### Cash Market

FII

+12594.38

BULLISH

DII

195.23

BEARISH

### Futures Market (Net OI)

FII

+71903

BULLISH

DII

-2208

BEARISH

Pro

-32815

BEARISH

Client

-36880

BEARISH

### Index Options Market (Net OI)

FII

+20003

BULLISH

DII

+10204

BULLISH

Pro

-98928

BEARISH

Client

+68721

BULLISH



## Stock Results

Kansai

Samvardhana

Pilani

Dalmia Bharat

Ram Ratna

Nerolac

Motherson

Investment

Motherson Sumi

Wires

Kansai

Kalpataru

GNA Axles

Wiring India

GCCL Infra

Nerolac

Projects

Dynamic

Gujarat Credit

& Proj

Hindustan

V-Mart Retail

Cables

Shiva

Unilever  
Market myndz

Granito

# IPO Watch



## Ongoing IPO's

| Company Name            | Closing Date | Overall Subscription |
|-------------------------|--------------|----------------------|
| HDB Financial Services  | 27 June 2025 | 1.13x                |
| Sambhv Steel Tubes      | 27 June 2025 | 1.71x                |
| Indogulf Cropsciences   | 30 June 2025 | 0.39x                |
| Suntech Infra Solutions | 27 June 2025 | 16.62x               |
| Supertech EV            | 27 June 2025 | 1.39x                |



## Upcoming IPO's

|                         |                    |   |
|-------------------------|--------------------|---|
| Suntech Infra Solutions | Bajaj Energy       | Solar91 Cleantech                             |
| HDB Financial Services  | Studds Accessories | Zepto PhonePe                                 |
| FabIndia                | Arohan Financial   | National Securities Depository Limited (NSDL) |
| OYO                     | Snapdeal           | Tata Capital                                  |
| boAt                    | Droom              |   |

# Myndbyte - Your bite-sized AI briefing before the bell

## Market Sentiment

The market displayed a mixed sentiment with certain sectors showing resilience while others experienced mild corrections over the past week.

## General Observations

- Technology and auto sectors showed relative strength during the week, contributing positively to market sentiment.
- Real estate and infrastructure-linked stocks faced headwinds, possibly due to macroeconomic concerns.
- Corporate earnings announcements influenced stock-specific movements across sectors.
- Investor focus remained on regulatory developments and global cues impacting large-cap stocks.

## Corporate Developments

### Tata Motors

Tata Motors stock rose 3.5% following the announcement of strong JLR sales figures for the quarter.

### Infosys

Infosys gained 2.8% after securing a large multi-year digital transformation deal with a global client.

### Adani Ports

Adani Ports declined by 2.1% amid reports of regulatory scrutiny on port operations.

### HDFC Bank

HDFC Bank saw a 1.9% rise after reporting improved net interest margins in its quarterly results.

## Notable Sector Trends

### Nifty IT

Nifty IT index rose by 2.1% over the last 7 days, indicating positive momentum in the technology sector.

### Nifty Auto

Nifty Auto gained 1.8% over the week, supported by strong performance in select auto stocks.

### Nifty Realty

Nifty Realty declined by 2.3% over the past 7 days, reflecting subdued investor sentiment in the real estate space.

### Nifty FMCG

Nifty FMCG remained largely flat over the week, suggesting a neutral stance from investors in consumer staples.

## Market Insights

### Market Sentiment:

Accumulation phase - smart money buying quietly.

### Confidence Level:



### Interpretation:

Despite prevailing fear, sectors are gradually rising and FIIs are accumulating while clients are selling, indicating quiet smart money accumulation.

Action: Good time to start building positions carefully.

Matched Combination: Fear + Sector Slowly Rising + FII Buying + Client Selling

### Evidence:

- Market sentiment marked by fear
- Sectors showing slow but steady upward movement
- FII data indicates net buying activity
- Client data shows net selling

This is a factual summary based on publicly available market data. It is not intended as investment advice or recommendation. Please consult a registered financial advisor before making any trading decisions.

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