

Gemini Stock Analysis Report

Based on the attached "Stock Detailed Analysis Report" for **CIPLA.NS**, here is the positional trading analysis.

Step 1: Audit the Data

- **Data Present:**
 - **Price Action:** Daily, Weekly, and 15-minute candlestick charts with EMA overlays (20, 50, 200).
 - **Trend Indicators:** MACD, Supertrend, Moving Averages.
 - **Volatility:** Bollinger Bands, Volatility Squeeze analysis.
 - **Momentum:** RSI (Relative Strength Index).
 - **Fundamentals:** Revenue/Net Income trends (Long-term and Short-term).
 - **Volume:** Distribution day analysis and Volume Moving Averages.
 - **Relative Strength:** Comparison against ^{^CNXP}PHARMA sector.
 - **Data Missing:**
 - **Specific News Catalyst:** While we see Net Income dropped -47.92% (Page 3), the report does not specify *why* (e.g., US FDA observation, one-off loss, or margin compression), which is crucial for determining if the drop is structural or temporary.
 - **Fibonacci Retracements:** No automated Fibonacci levels provided to identify potential support zones below current lows.
 - **Confidence Level: High.** The technical data is comprehensive, and the trend direction is unambiguous. The contradictory text on Page 14 (labeling a move "**Bullish**" while the chart clearly shows a crash) is noted and corrected by visual inspection of the charts.
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Step 2: Analyze the Setup

- **Trend Direction (**Bearish**):** The stock is in a confirmed **Strong Downtrend**.
 - **EMA Alignment:** Price (1324) < 20 EMA (1393) < 50 EMA (1450) < 200 EMA (1492). This "stacked" formation confirms bearish dominance on the daily timeframe.
 - **Supertrend:** The daily Supertrend signaled "SELL" on 2025-10-28 and remains bearish with resistance at 1403.44.
- **Momentum & Oscillators:**
 - **RSI:** Currently at **23.05** (Page 16). This indicates the stock is deeply **Oversold**. While this often precedes a relief bounce, oversold conditions can persist in strong downtrends (a "waterfall" decline).
 - **MACD:** The histogram is negative, and the MACD line is below the signal line (Page 12), confirming bearish momentum, though the momentum is "weakening" slightly (likely due to the severity of the drop slowing down, not a reversal).
- **Volume & Distribution:**
 - Page 18 indicates a cluster of **Distribution Days** (selling on high volume) leading up to the current date (Jan 2026). This suggests institutional exit.
- **Relative Strength:**
 - RS Score is 45/100 and lagging the Pharma sector (Page 4). We generally avoid long positions in stocks with RS below 50 unless playing a specific reversal setup.
- **Fundamental Context:**
 - The short-term fundamentals (Page 3) are alarming. A **-47.92% drop in Net Income** Quarter-over-Quarter suggests a material change in the business, justifying the price decline.

Conclusion: The stock is attempting to find a floor at a new 52-week low. There is no evidence of a "bottom" yet. This is currently a "falling knife."

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Step 3: Formulate the Recommendation

Decision: NO.

Analysis: Do not enter this stock at the current market price of 1324. The probability of a sustainable 5-15% upside is low because the stock faces massive overhead resistance (EMAs and trapped buyers). Entering now is gambling on a V-shaped recovery, which is statistically rare in the face of deteriorating fundamentals and distribution volume.

Conditional Plan (Reversal Setup): Since the stock is deeply oversold (RSI 23), a "dead cat bounce" or a mean reversion trade is possible, but it requires confirmation of stability. I will strictly wait for the trend to shift from "crashing" to "consolidating."

- **Condition to Buy:** The stock must close above the **Daily 20 EMA** AND the **Supertrend Resistance**. This proves that the immediate selling pressure has exhausted and buyers have regained short-term control.
- **Entry Price:** **INR 1,415 - INR 1,425** (A daily close above this zone clears the 20 EMA at ~1393 and the Supertrend barrier at ~1403, confirming a trend change).
- **Stop Loss:** **INR 1,320** (Just below the current swing low/support).
- **Take Profit:** **INR 1,500 - INR 1,550** (Targeting the 200 EMA and the Upper Bollinger Band gap fill).

News & Analyst Targets

Equity Research Update: Cipla Ltd (CIPLA)

Date: January 31, 2026 **Subject:** Q3 FY26 Review, Brokerage Actions, and Regulatory Updates

1) Latest News for CIPLA This Week

The most significant event for Cipla this week was the announcement of its **Q3 FY26 earnings**, which significantly missed street estimates, triggering a sharp decline in the stock price.

- **Weak Q3 FY26 Financials:** Cipla reported a **57% year-on-year (YoY) drop in consolidated net profit** to INR 675 crore (vs. ~INR 1,570 crore in Q3 FY25). Revenue remained flat YoY at INR 7,074 crore.
- **Margin Contraction:** EBITDA margins contracted sharply to **17.7%** (down from ~28% YoY), driven by a "perfect storm" of headwinds:
 - **US Market Pressure:** A sharp decline in sales of **gRevlimid** (lenalidomide), a high-margin cancer drug.
 - **Supply Disruptions:** Pause in the supply of **Lanreotide** (a key complex injectable) due to regulatory issues at its partner's facility.
 - **Operational Costs:** One-off impacts from new labor code adjustments and higher R&D spend.
- **Stock Performance:** Following the results, Cipla shares fell over 4-5% and are currently trading near 52-week lows (approx. INR 1,310 - INR 1,320 levels).
- **Management Transition:** The company confirmed that current MD Umang Vohra will step down in March 2026, with **Achin Gupta** set to take over as the new CEO, signaling a strategic pivot towards domestic market focus and chronic therapies.

2) Brokerage Upgrades & Downgrades

The analyst community has responded negatively to the earnings miss, with most brokerages slashing price targets and some downgrading their ratings.

Gemini Stock Analysis Report

- **Jefferies** downgraded the stock to '**Underperform**' from 'Hold', citing the steep erosion in US margins and lack of near-term catalysts.
- **Nuvama** reiterated its '**Reduce**' rating, calling the margin miss a "negative surprise" and highlighting the near-term profitability challenges.
- **Nomura** maintained a '**Buy**' rating but significantly **cut its target price**, viewing the current valuation as reasonable despite the temporary setbacks.
- **Motilal Oswal** maintained a '**Neutral**' stance but lowered its target, noting that earnings are expected to decline in FY26 after years of robust growth.

3) Other News Impacting CIPLA

Several regulatory and operational developments are weighing on the stock:*

- US FDA / Lanreotide Issue (Critical):** The production of Lanreotide has been **temporarily paused**. This follows a US FDA inspection of partner **Pharmathen's** facility in Greece (Nov 2025), which resulted in 9 observations. Cipla expects re-supply to resume only in H1 FY27 (April-September 2026).
- Product Recalls:** Cipla USA is recalling over **15,000 syringes of Lanreotide Injection** and **92,000 tubes of Diclofenac Sodium Topical Gel** in the US market due to manufacturing and specification issues.*
- Legal Settlement:** A patent litigation involving **Gilead Sciences and Cipla** regarding the HIV drug *Biktarvy* was reportedly dismissed in the US District Court (Delaware) this week, with terms allowing FDA approval of Cipla's generic under agreed conditions.*
- Partnership:** Cipla has been named the official "Recovery Partner" for the **2026 Two Oceans Marathon**, reinforcing its brand visibility in the wellness space.

4) Latest Analyst Targets for CIPLA

Below is a summary of the revised price targets and ratings released by major brokerages following the Q3 FY26 results (Late January 2026).

Brokerage Firm	Previous Rating	Current Rating	Old Target (INR)	New Target (INR)	Upside/Downside*
Jefferies	Hold	Underperform	1,450	1,170	-11.4%
Nuvama	Reduce	Reduce	1,400	1,280	-3.0%
Motilal Oswal	Neutral	Neutral	1,500	1,310	-0.8%
Nomura	Buy	Buy	1,770	1,510	+14.4%
Elara Capital	Accumulate	Accumulate	1,670	1,438	+8.9%
HSBC	Hold	Hold	1,350	1,285	-2.7%
Kotak Institutional	Add	Add	1,625	1,475	+11.7%

(Upside/Downside calculated based on an approximate CMP of INR 1,320 as of Jan 30, 2026)

Analyst Take: The immediate outlook is bearish due to the "earnings cliff" in the US business. However, long-term investors are watching for the resolution of the Lanreotide supply chain issues and the leadership transition under Mr. Achin Gupta.

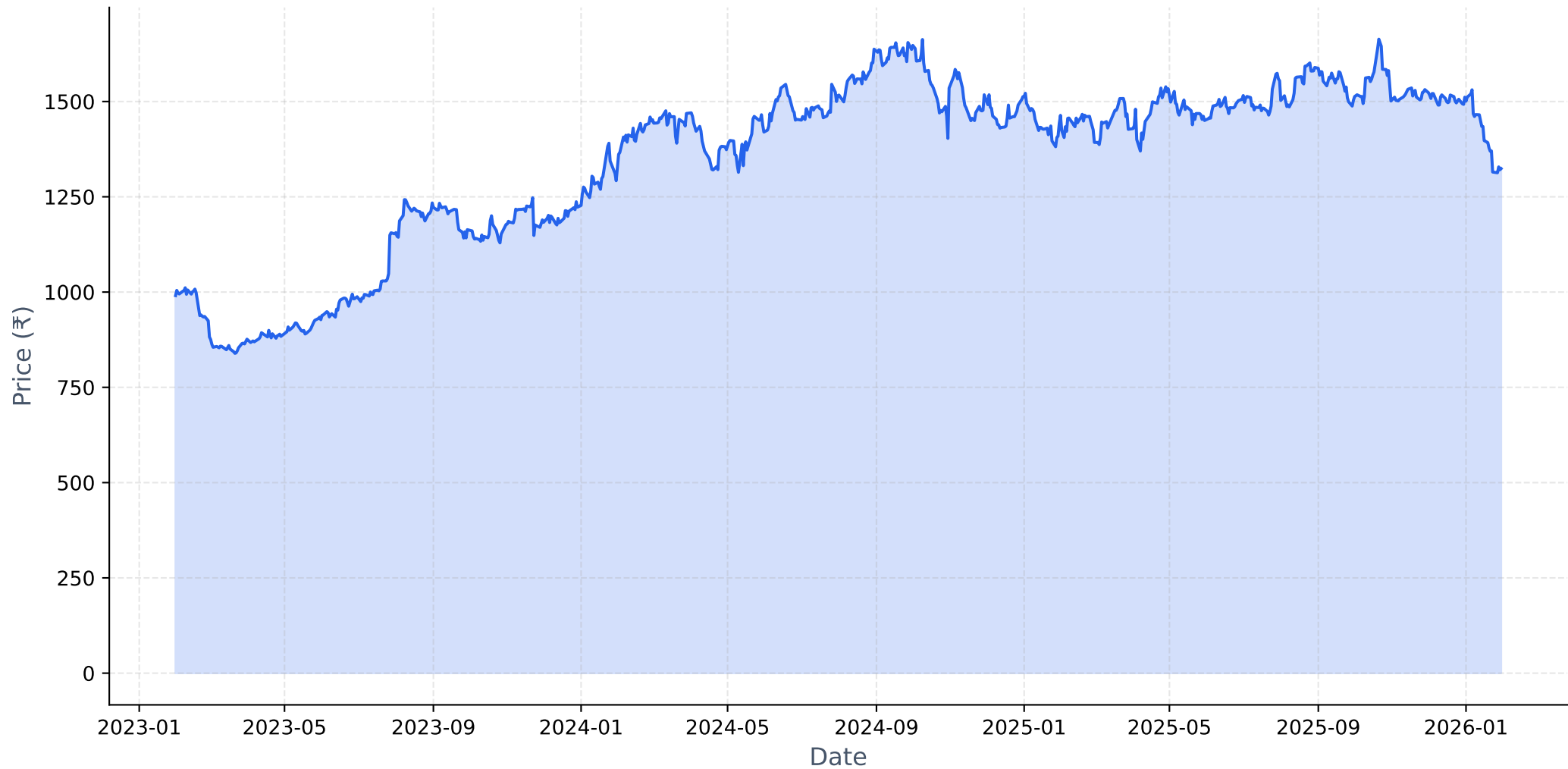
Stock Detailed Analysis Report

CIPLA.NS

Current Price: ₹1324.00

Generated: 2026-01-31 11:34

CIPLA.NS - 3 Year Daily Price Chart



Long-term Fundamental Analysis (4 Years)

Metric	Is Growing?	Accelerating?	1Y Growth	3Y CAGR
Revenue	Yes	No	6.68%	7.88%
Net Income	Yes	No	27.93%	27.96%
ROE	Yes	No	9.52%	11.86%
EPS	Yes	No	27.89%	27.91%

Short-term Fundamental Analysis (6 Quarters)

Metric	Is Growing?	Recent QoQ	Avg QoQ
Revenue	Yes	1.84%	0.06%
Net Income	No	-47.92%	-10.84%
ROE	No	-14.71%	-14.71%
EPS	No	-47.92%	-5.57%

CIPLA.NS - Relative Strength Analysis

== OVERVIEW ==:

Benchmark Index:	^CNXPHARMA
Sector:	Pharma
Classification:	Neutral
RS Score:	45.0/100

:

== RS RATIOS ==:

1M RS:	0.911 [Neutral]
3M RS:	0.881 [Neutral]
6M RS:	0.878 [Neutral]
1Y RS:	0.955 [Neutral]

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== TURNAROUND ANALYSIS ==:

Turnaround Status:	Not Detected
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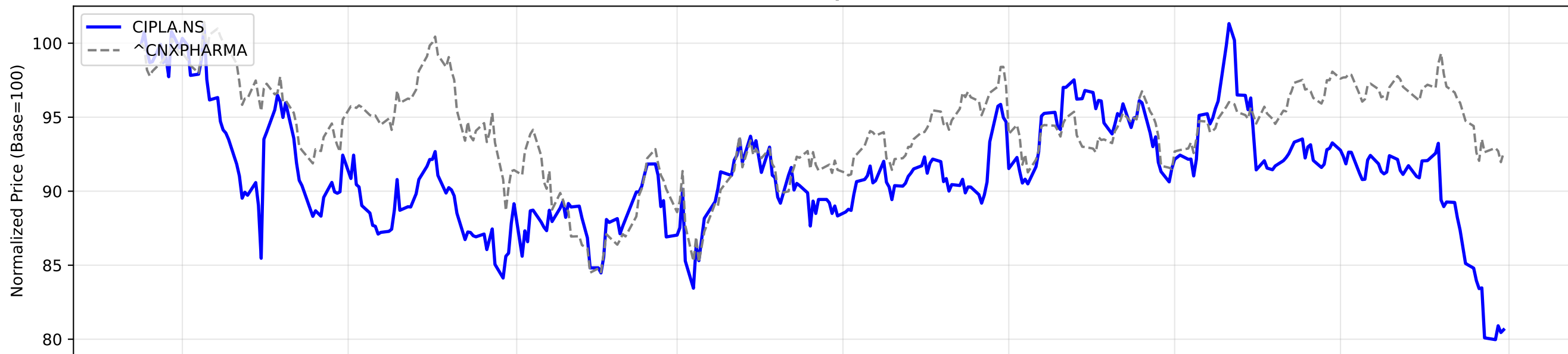
SIGNAL CRITERIA::

✓ Emerging RS:	1M (0.911) > 3M (0.881)
✓ Medium-term Lagging:	6M=0.878, 1Y=0.955 (≤ 1.0)
✗ Performance Improving:	Not improving

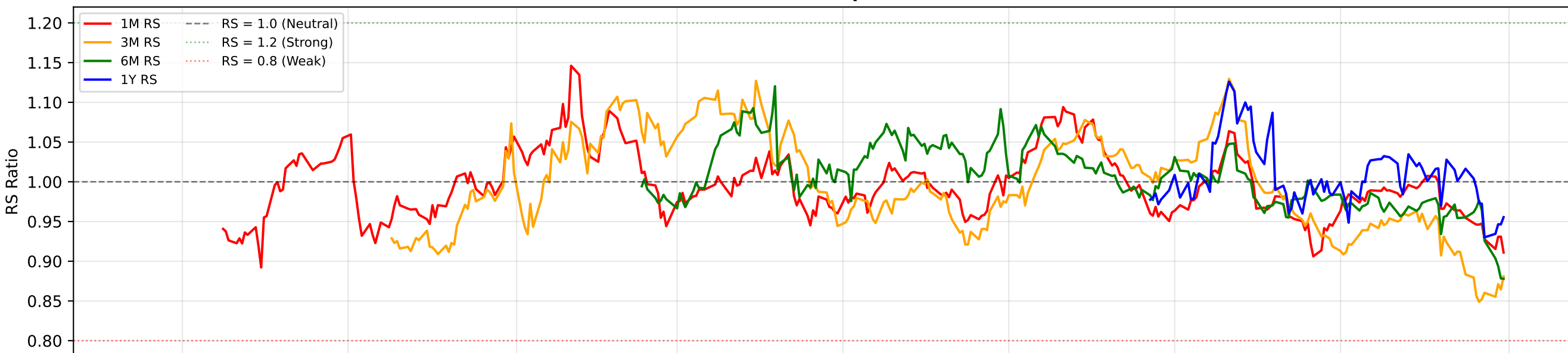
Relative Strength Analysis: CIPLA.NS vs ^CNXPHARMA

Classification: Neutral

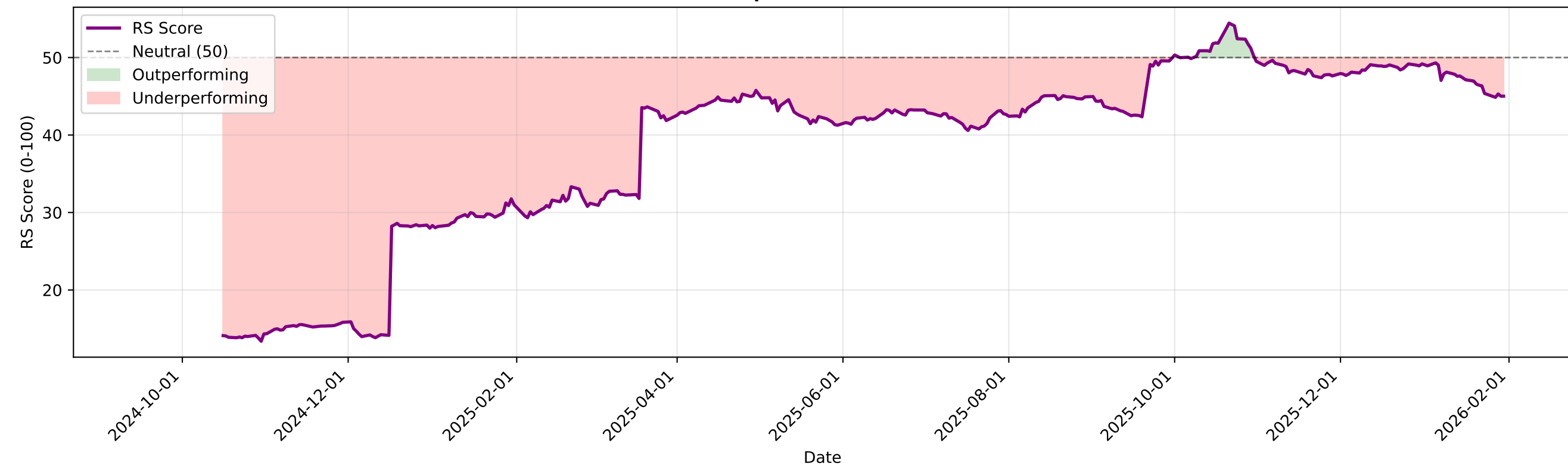
Price Performance Comparison (Normalized)



RS Ratio Trends (Multiple Timeframes)



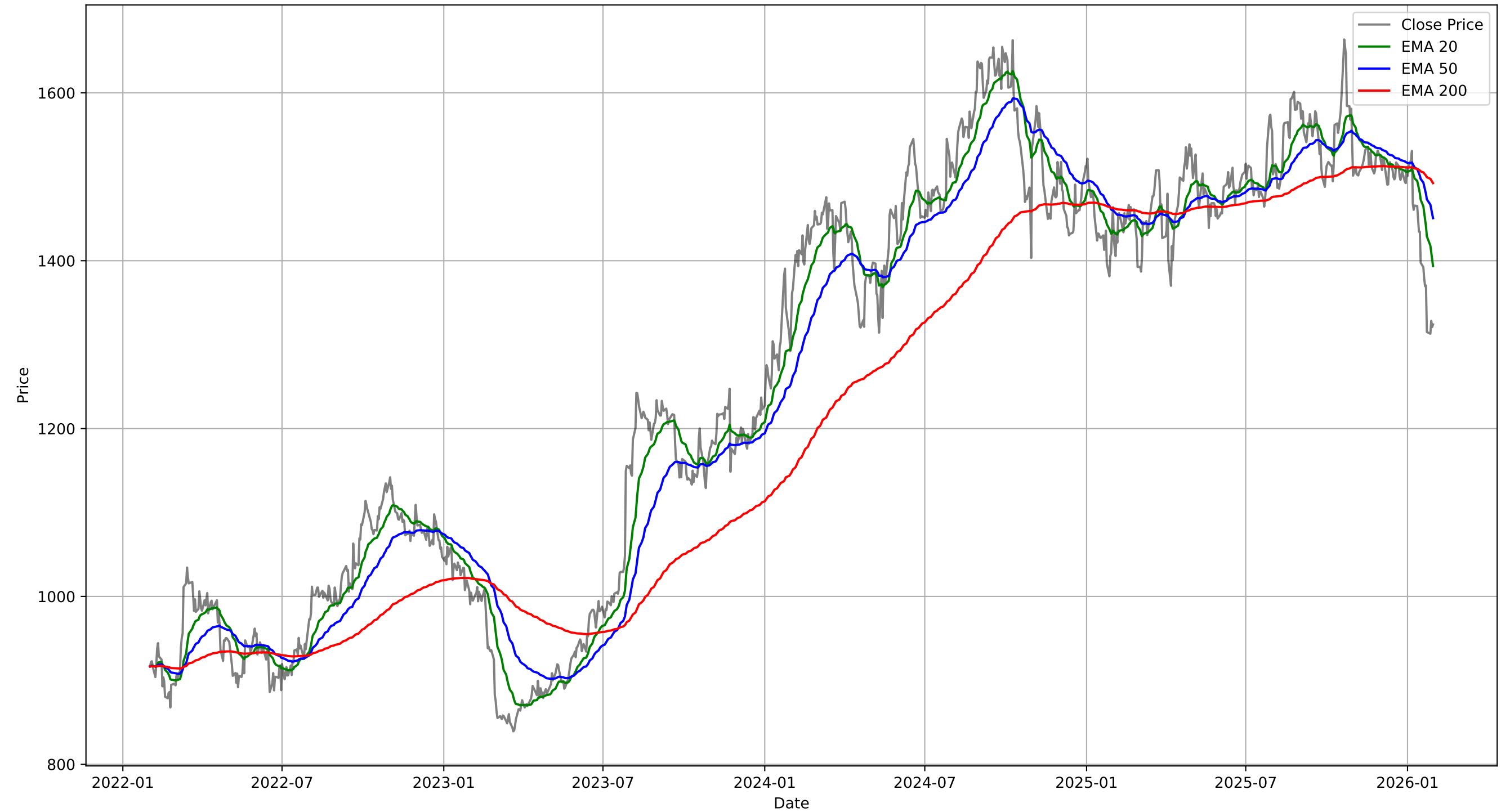
RS Composite Score Timeline



CIPLA.NS - EMA Crossover Summary

EMA 20:	1393.60
EMA 50:	1450.70
EMA 200:	1492.48
Trend Status:	Strong Downtrend

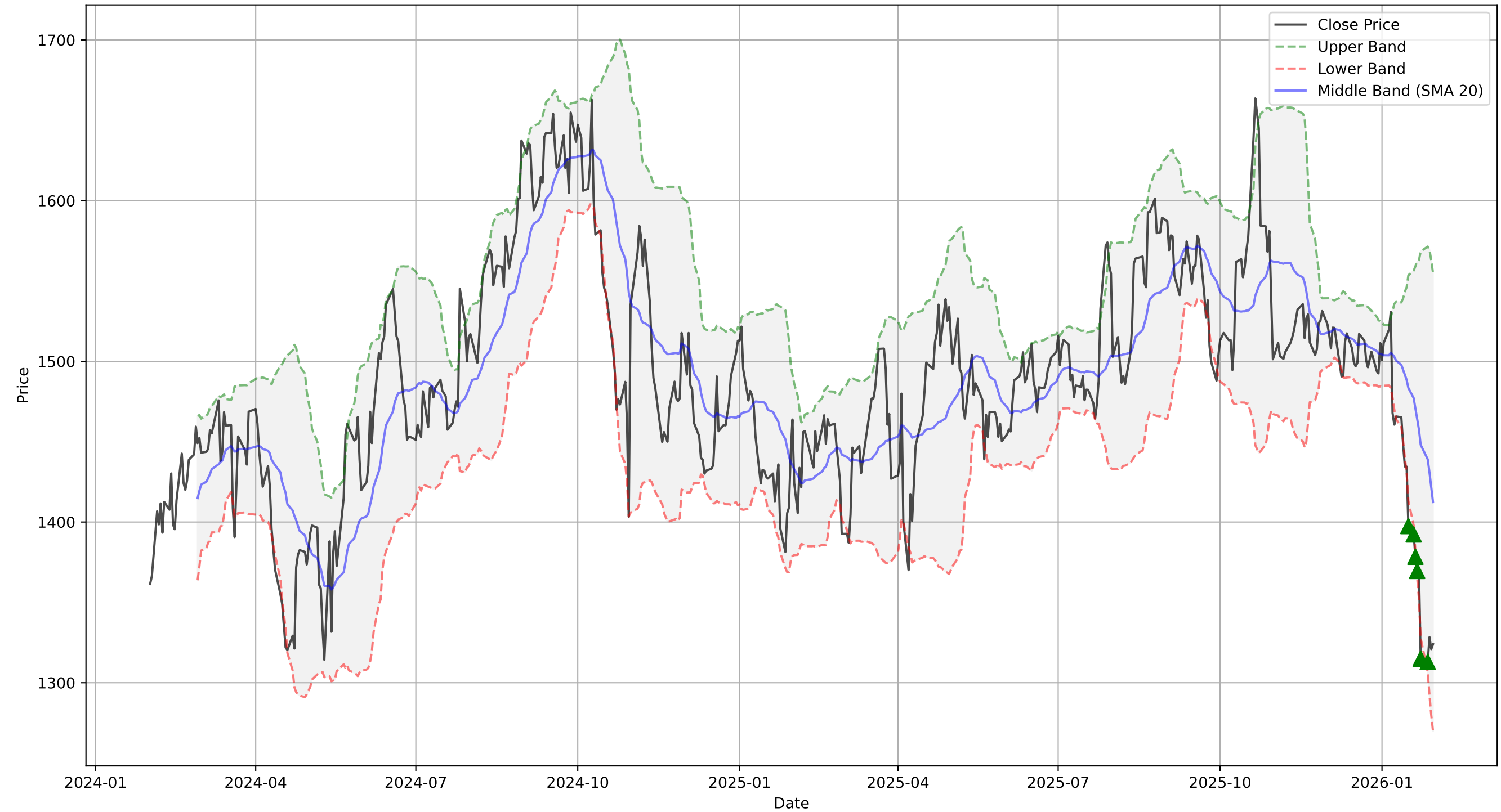
CIPLA.NS EMA Crossover Analysis



CIPLA.NS - Bollinger Bands Summary

Current Price:	1324.00
Upper Band:	1555.09
Middle Band (SMA 20):	1412.42
Lower Band:	1269.75
%B:	0.1901
Band Width:	0.2020
Status:	Lower Half
Signal:	None
Recent Signal 1:	Buy Signal at 2026-01-21 00:00:00+05:30
Recent Signal 2:	Buy Signal at 2026-01-23 00:00:00+05:30
Recent Signal 3:	Buy Signal at 2026-01-27 00:00:00+05:30

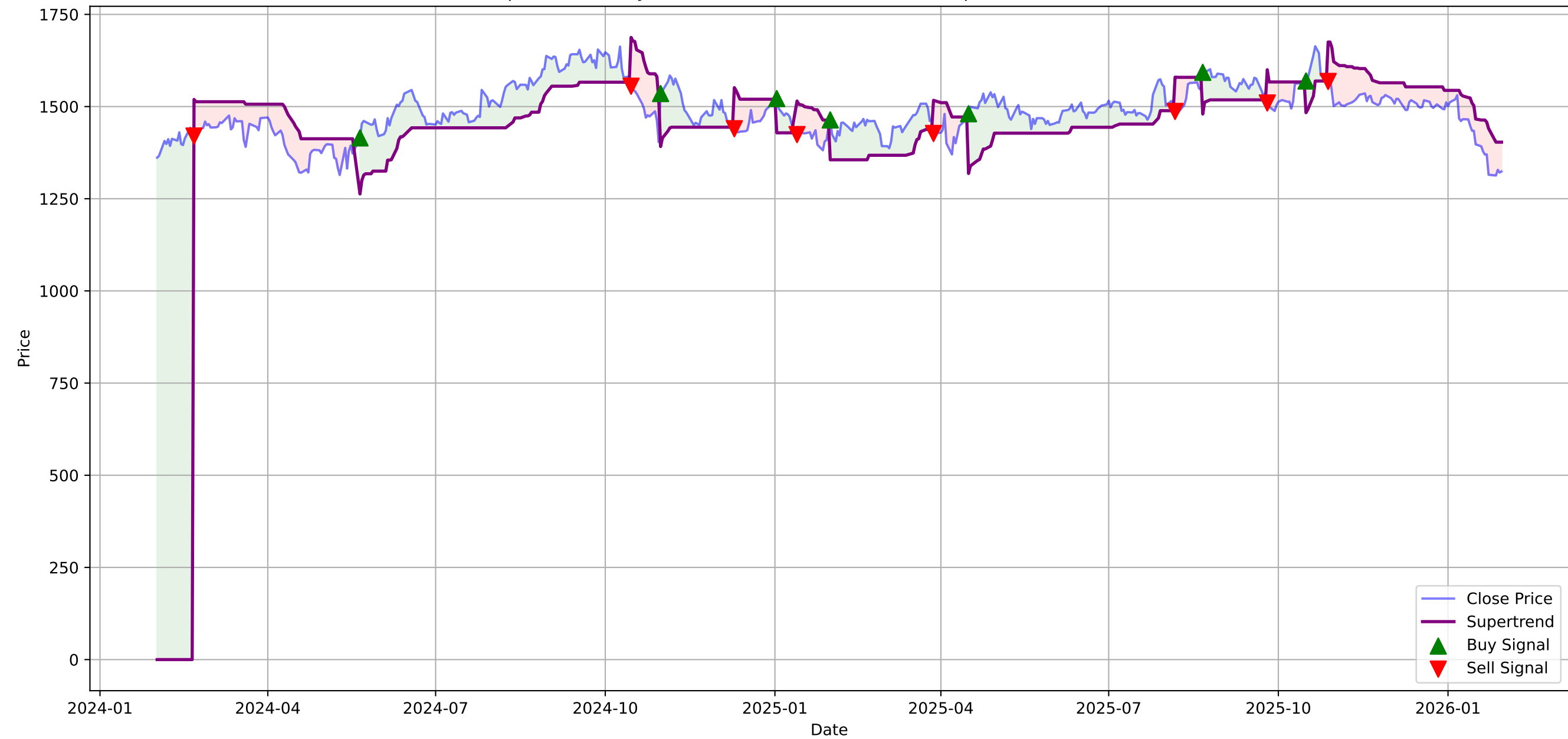
CIPLA.NS Bollinger Bands (20, 2) Analysis



CIPLA.NS - Supertrend Summary

Status:	DOWNTREND (Sell)
Supertrend Value:	1403.44
Signal Identified On:	2025-10-28

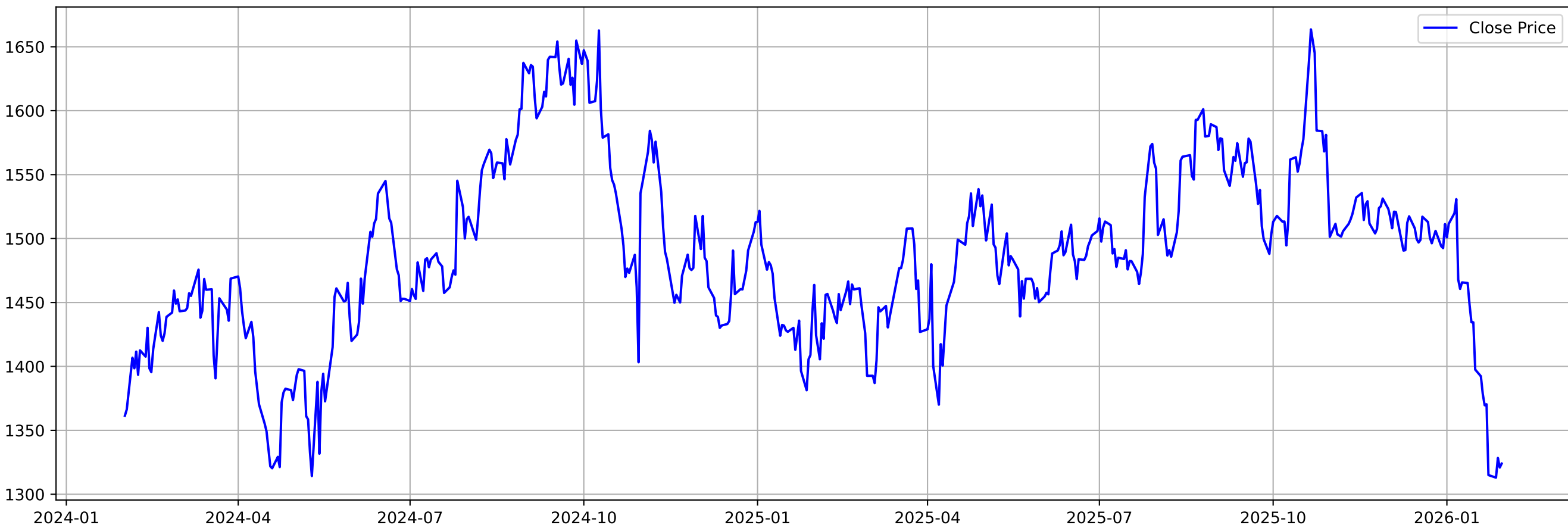
Supertrend Analysis for CIPLA.NS (Period: 14, Multiplier: 3.0, Interval: 1d)



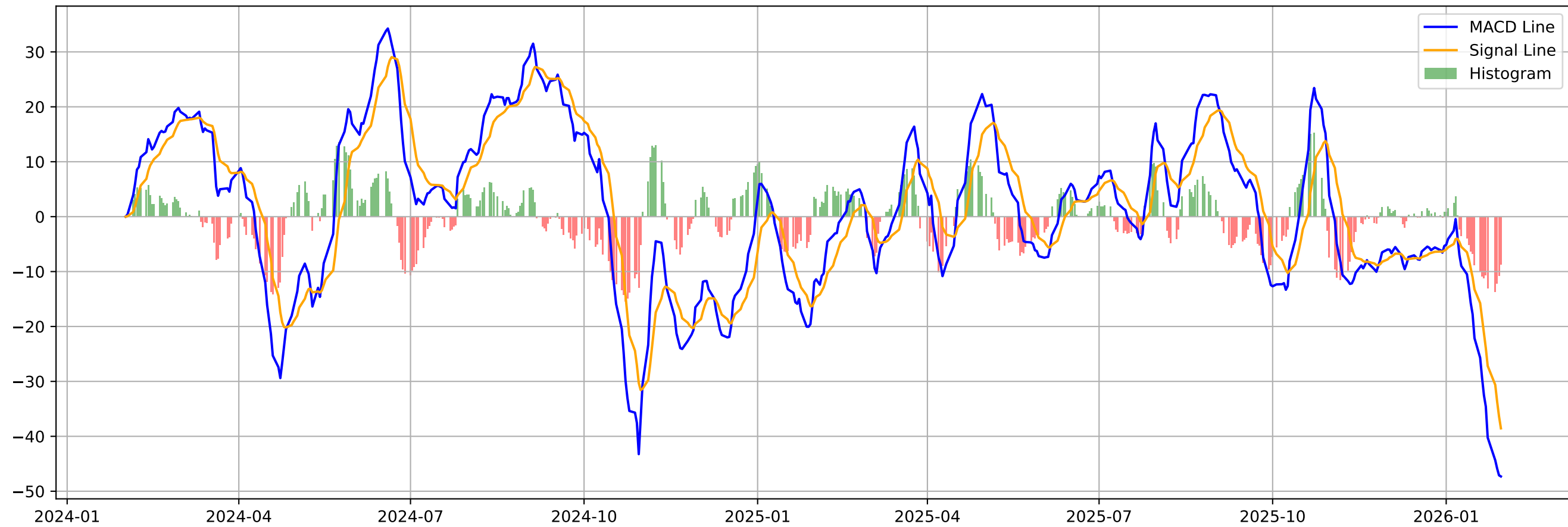
CIPLA.NS - MACD Summary

MACD Line:	-47.31
Signal Line:	-38.55
Histogram:	-8.76
Trend:	Bearish
Momentum:	Weakening
Signal:	None

CIPLA.NS Price



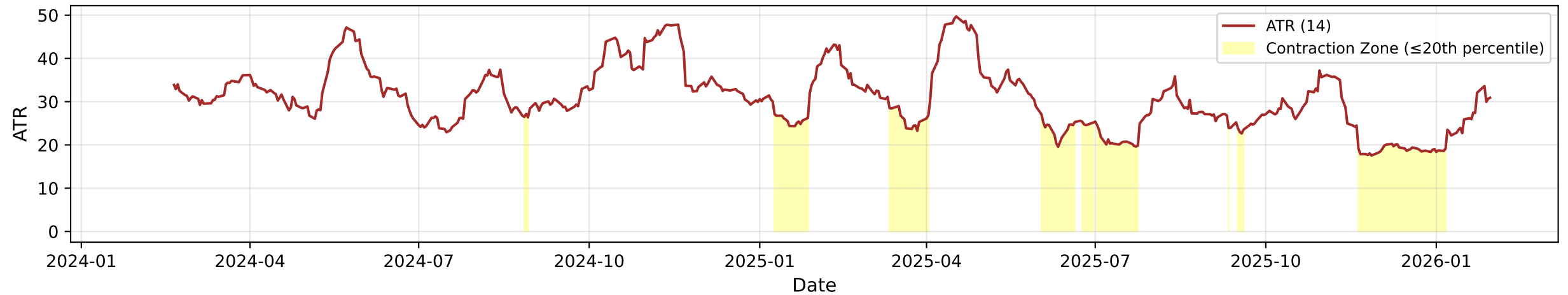
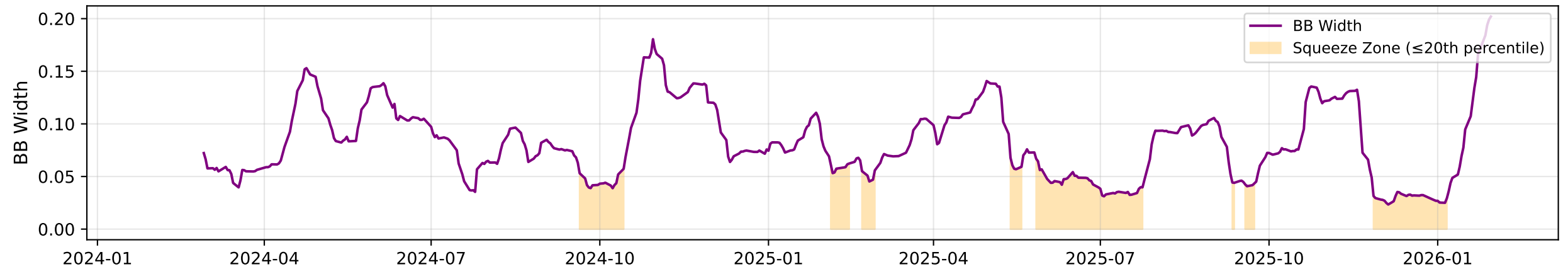
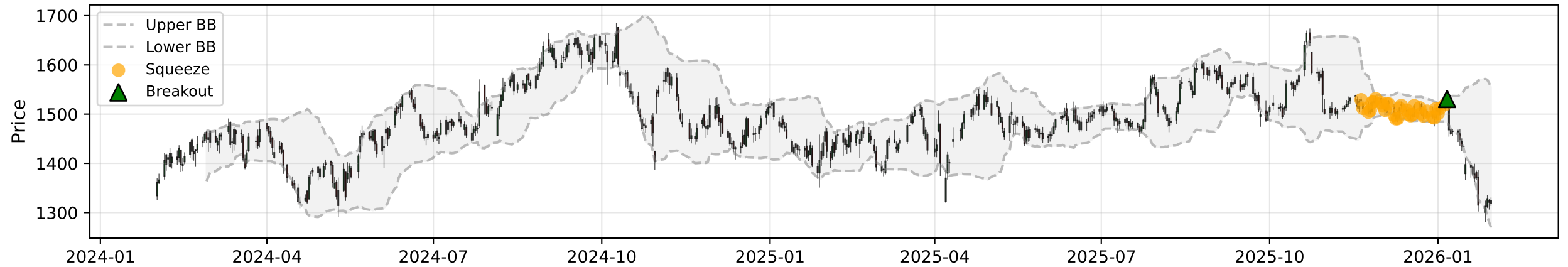
CIPLA.NS MACD (12, 26, 9)



CIPLA.NS - Volatility Squeeze Summary

BB Width:	0.2020
ATR:	30.9143
Total Signals:	33
Signal 1:	BB Squeeze + ATR Contraction at 2025-12-31 00:00:00+05:30 (Pr
Signal 2:	BB Squeeze + ATR Contraction at 2026-01-01 00:00:00+05:30 (Pr
Signal 3:	BB Squeeze + ATR Contraction at 2026-01-02 00:00:00+05:30 (Pr
Signal 4:	BB Squeeze + ATR Contraction at 2026-01-05 00:00:00+05:30 (Pr
Signal 5:	BB Squeeze + ATR Contraction (Bullish Breakout) at 2026-0

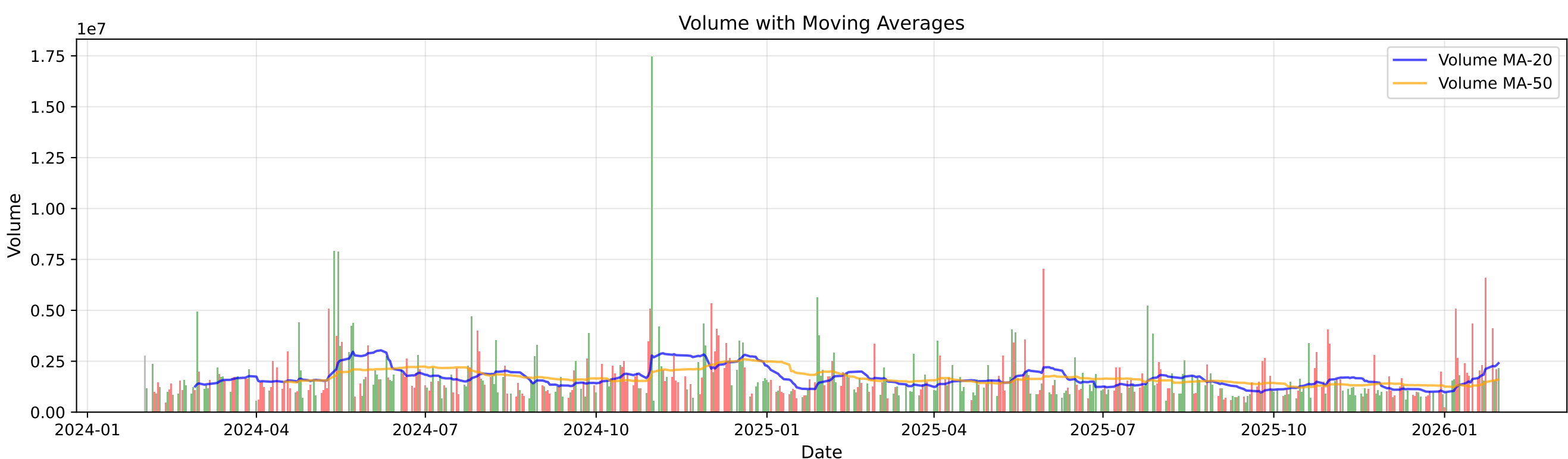
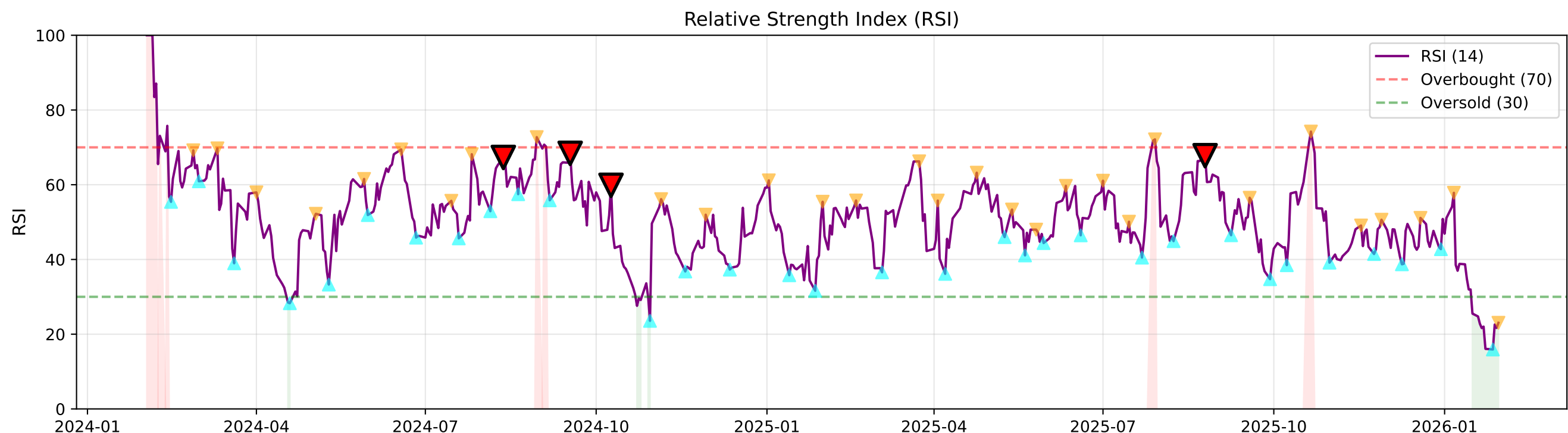
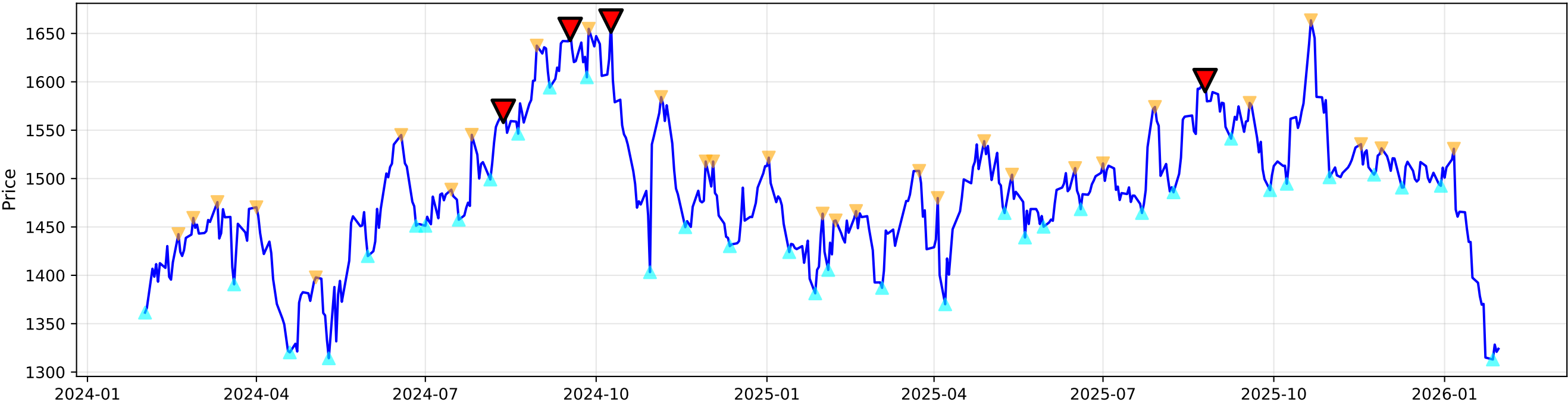
CIPLA.NS - Volatility Squeeze Analysis



CIPLA.NS - RSI-Volume Summary

Current RSI:	23.05
Current Volume:	2157808
Volume MA 20:	2403586
Bullish Divergences:	0
Bearish Divergences:	4
Bearish Div 1:	Date: 2024-10-09 00:00:00+05:30, Price: 1662.74
Bearish Div 2:	Date: 2025-08-25 00:00:00+05:30, Price: 1601.20

CIPLA.NS RSI-Volume Divergence Analysis



CIPLA.NS - Volume Analysis

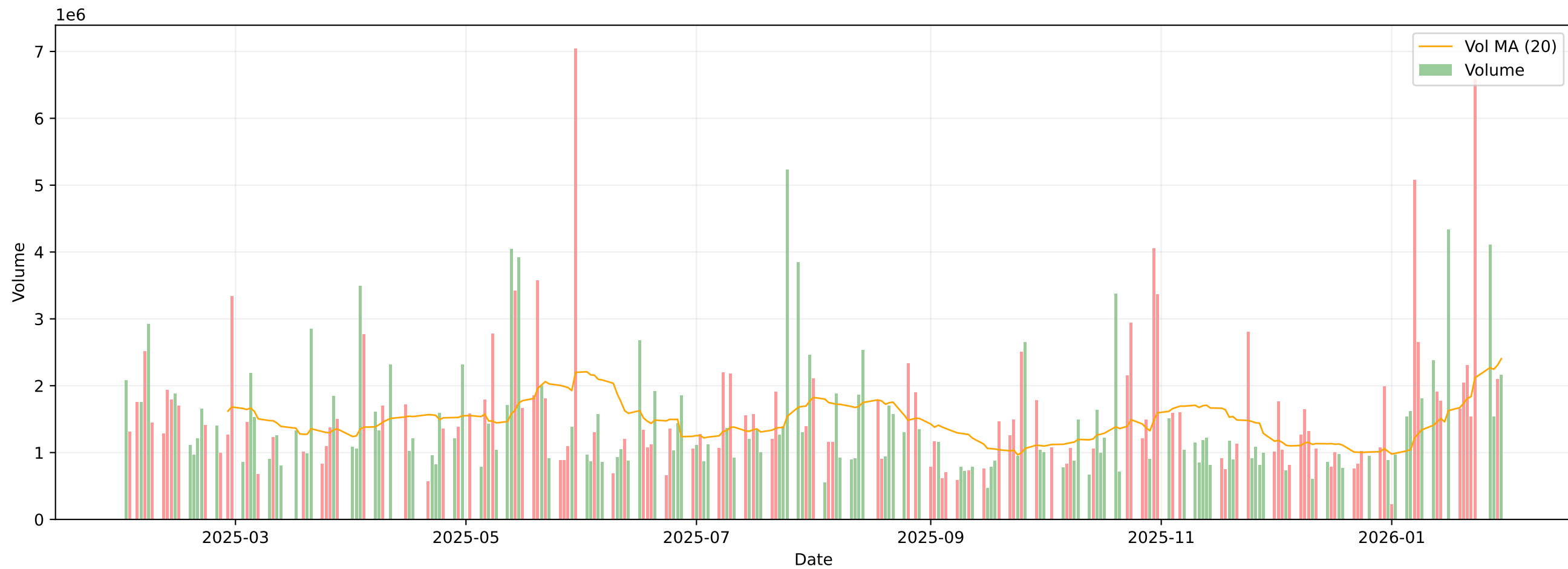
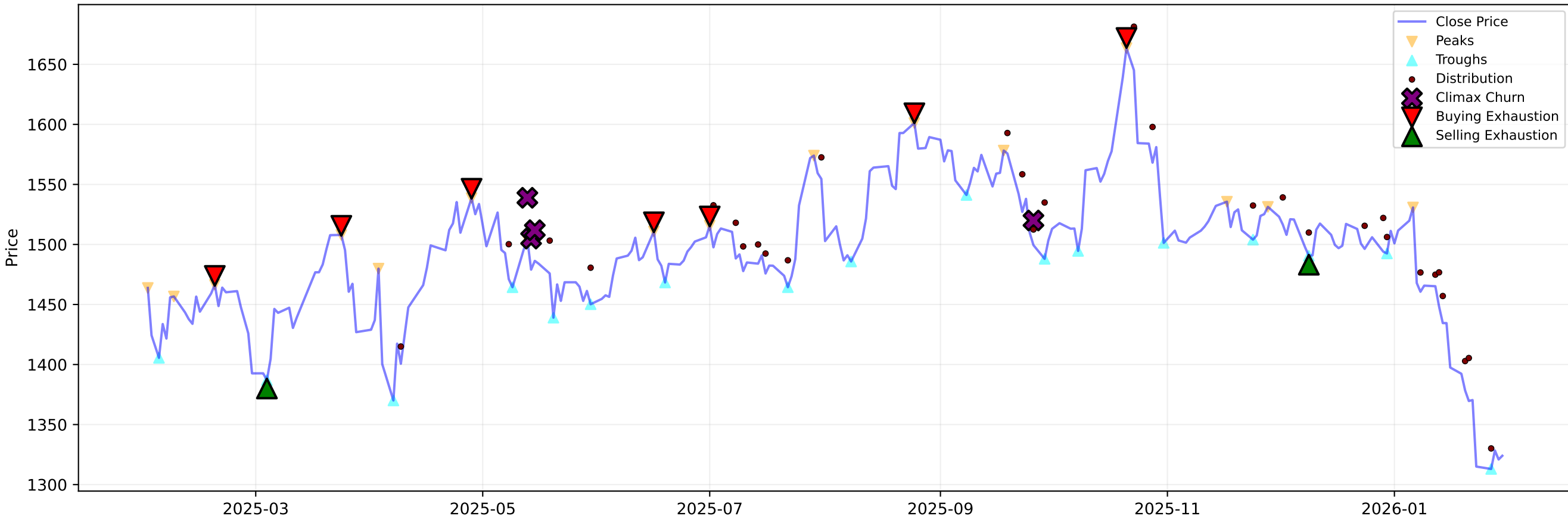
== VOLUME ANALYSIS ==:

Status: 44 Signals Detected

:

2026-01-13 [-]:	Distribution Day
2026-01-14 [-]:	Distribution Day
2026-01-20 [-]:	Distribution Day
2026-01-21 [-]:	Distribution Day
2026-01-27 [-]:	Distribution Day

CIPLA.NS - Volume Analysis



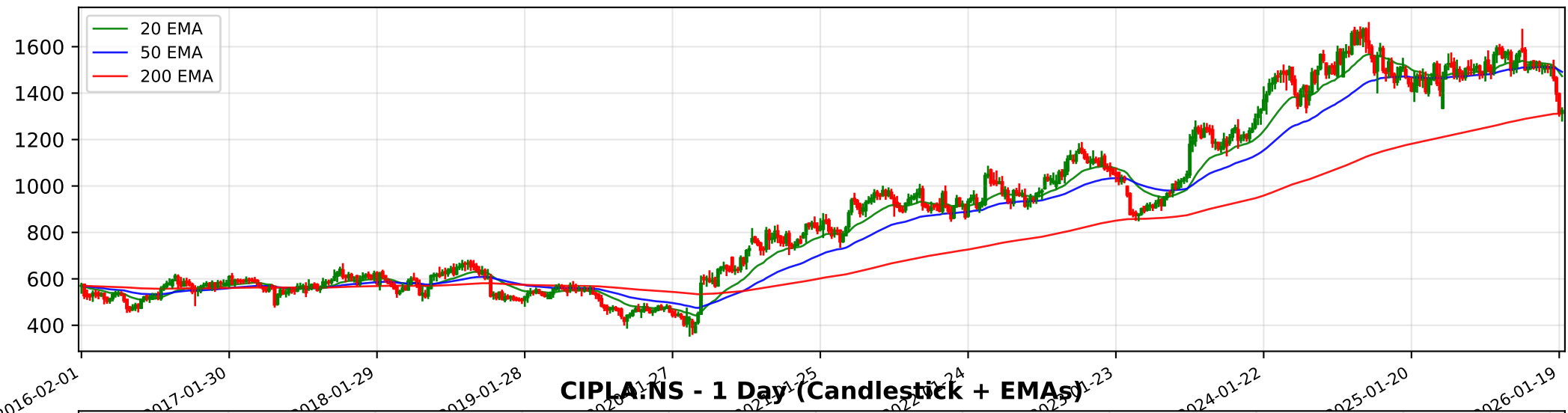
Multi-Timeframe Supertrend Analysis

Timeframe	Status	Value	Last Price	Signal Date
1 Week	DOWNTREND (Sell)	1433.51	1324.0	2026-01-05
1 Day	DOWNTREND (Sell)	1403.44	1324.0	2025-10-28
15 Min	UPTREND (Buy)	1317.3	1324.0	2026-01-30

Multi-Timeframe MACD Analysis

Timeframe	Trend	Momentum	Signal
1 Week	Bearish	Strengthening	No Signal
1 Day	Bearish	Weakening	No Signal
15 Min	Bullish	Weakening	No Signal

CIPLA.NS - 1 Week (Candlestick + EMAs)



CIPLA.NS - 1 Day (Candlestick + EMAs)



CIPLA.NS - 15 Min (Candlestick + EMAs)



Trendlyne Snapshot - CIPLA_main

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MARKETS / SECTOR : PHARMACEUTICALS & BIOTECHNOLOGY / INDUSTRY : PHARMACEUTICALS / CIPLA LTD.

Cipla Ltd.

NSE: CIPLA | BSE: 500087

Cipla Live Share Price Today, Share Analysis and Chart

Slowing Down Stock

In 7 Starfolio Baskets

1324.00

3.10 (0.23%)

New 52W Low in past week

2.2M

NSE+BSE Volume

NSE 30 Jan, 2026 3:31 PM (IST)

Watchlist

Portfolio

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My Notes

TRADE STOCK

OverviewFORECASTERSTOCK REPORTBuy Sell ZoneF&OFinancialsNewsReportsTechnicalsShareholdingDealsCorporate ActionsAlertsAbout

Cipla Key Metrics

Preset Metrics

Default

Market Capitalization >High in Industry	106,950.2	PE TTM >Above Industry Median	23.5	PEG TTM >Negative PEG TTM	-2.6	Price to Book >Above Industry Median
Institutional holding current Qtr % >Market Runner Up	54.6	Operating Revenue growth TTM % >Below Industry Median	5.1	Net Profit Qtr Growth YoY % >Negative Net Profit Qtr Growth YoY %	-57	Net Profit TTM Growth % >Negative Net Profit TTM Growth %
Operating Profit Margin Qtr % >Above Industry Median	17.7	Operating Profit Margin TTM % >Above Industry Median	22.8	Piotroski Score >Below Industry Median	4	Rel Perf vs Nifty50 quarter% >
ROE Annual % >		ROA Annual % >				

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Key Metrics

DVM

Price Chart

Forecaster

Financials

Technicals

Shareholding

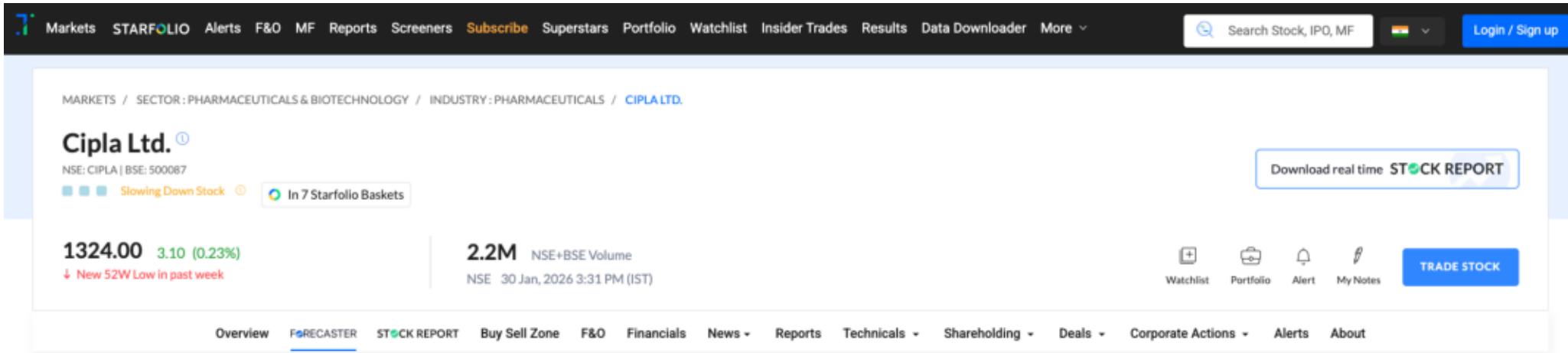
Deals

Documents

Corporate actions

Company Profile

Trendlyne Snapshot - CIPLA_forecaster



Cipla - CIPLA - stock price prediction, stock forecast, target price, analyst ratings from 36 analysts

Cipla has a share price target of Rs 1459, revenue growth forecast of 2.9%, and profit growth estimate of -20.6% for FY26, based on top 36 analyst calls.



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SAMPLE DATA BELOW

