

Gemini Stock Analysis Report

Based on the detailed 23-page analysis report for **PERSISTENT.NS**, here is the positional trading assessment.

Step 1: Audit the Data

- **Data Present:**
 - **Price Action:** Daily and Weekly candlestick charts with EMA overlays (20, 50, 200).
 - **Trend Indicators:** Supertrend (Daily & Weekly), MACD (12, 26, 9), and Moving Averages.
 - **Momentum/Volatility:** RSI (14), Bollinger Bands, and Volatility Squeeze analysis.
 - **Volume:** Volume Analysis with specific "Distribution" and "Exhaustion" signals.
 - **Relative Strength:** RS comparison vs. Benchmark (^CNXIT).
 - **Fundamental Snapshot:** Revenue/EPS growth trends and valuation metrics (PE, PEG).
- **Data Missing:**
 - **Institutional Activity:** While volume is present, specific FII/DII flow data is not explicitly detailed beyond general volume bars.
 - **Option Chain:** No Open Interest (OI) data to confirm resistance/support levels via derivatives.
- **Confidence Level: High.** The report provides a comprehensive technical suite sufficient for a positional trade decision. The date of the report is simulated/future-dated (Jan 31, 2026); analysis is performed assuming this is "today's" data.

Step 2: Analyze the Setup

- **Trend & Structure:**
 - **Long-Term:** The stock is in a primary uptrend (Price > EMA 200 at 5794, and Weekly Supertrend is **Bullish**).
 - **Intermediate-Term:** The stock is undergoing a significant correction. It is trading *below* the EMA 20 (6235) and EMA 50 (6194). The Daily Supertrend triggered a "Sell" in Dec 2025.
 - **Current State:** The price (6035) is hugging the **Lower Bollinger Band**, indicating strong downward pressure.
- **Momentum:**
 - **Bearish:** MACD is below the signal line and descending. RSI is at 39.80, indicating weakness but not yet deeply oversold (typically <30).
 - **Relative Strength:** The stock is classified as "Neutral" (RS Score 50.5) and is currently underperforming its sector benchmark (^CNXIT), evidenced by the pink shading in the RS Composite chart.
- **Key Signals:**
 - **Negative:** High frequency of "Distribution Days" in Jan 2026.
 - **Positive:** A "Selling Exhaustion (**Bullish** Div)" signal was detected on 2026-01-30 (Page 18). This suggests the selling pressure may be nearing a climax.
 - **Support Confluence:** The stock is approaching a critical support cluster: The **EMA 200 sits at 5794**.

Step 3: Formulate the Recommendation

Decision: NO (Do Not Enter at Current Market Price)

Rationale: Entering now is technically "catching a falling knife." While the long-term trend is up, the intermediate momentum is strongly bearish. The price is below the 20 and 50-day EMAs, and the Relative Strength is lagging. The optimal positional entry requires a test of major support or a reclaim of momentum.

Conditional Plan (Wait for Support Test): The highest probability setup for a 1-4 month hold is to buy the

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dip at the long-term institutional support level (EMA 200), rather than buying the breakout which is currently too far away (above 6235).

- **Condition to Buy:** Wait for the price to drop into the **5800-5850** zone (Confluence of EMA 200 and Weekly Support). Look for a daily candle close that shows rejection of lower prices (e.g., a Hammer or Doji) in this zone.
- **Entry Price:** INR 5,825 (Limit order near EMA 200).
- **Stop Loss:** INR 5,590 (Hard stop closing below the swing low/support buffer; approx 4% risk).
- **Take Profit:** INR 6,450 (Targeting the Upper Bollinger Band and previous breakdown levels; approx 10-11% upside).

News & Analyst Targets

Based on the latest available information as of **January 31, 2026**, here is the research update on **Persistent Systems (PERSISTENT)**.

1) Latest News for Persistent Systems (This Week: Jan 26-31, 2026)

- **Q3 FY26 Results Analysis:** The primary news this week follows the company's Q3 FY26 earnings announced earlier in the week.
 - **Revenue Growth:** Reported revenue of **\$422.5 million**, up **17.3% YoY** and **4.0% QoQ**, marking its 23rd consecutive quarter of revenue growth.
 - **Profitability:** Net Profit (PAT) rose **17.8% YoY** to **INR 439.5 crore**. However, margins faced a temporary hit (~150 bps impact) due to one-time labor code changes, though adjusted EBIT margin stood resilient at **16.7%**.
 - **Dividend:** The Board declared an interim dividend of **INR 22 per share**. The stock traded ex-dividend earlier this week (Record date: Jan 27, 2026).
- **Management Resignation:** On January 30, 2026, the company announced the resignation of **Vijay Verma**, Executive Vice President (Service Line BU), effective immediately. His responsibilities have been taken over by Nitha Puthran.
- **Stock Reaction & Derivatives:** Despite the "beat" on revenue, the stock has faced selling pressure this week (down ~3-5% post-results), attributed to "sell on news" behavior and valuation concerns. Data shows a sharp surge in Open Interest (short buildup) on Jan 29-30, indicating bearish sentiment from traders in the short term.

2) Brokerage Upgrades & Downgrades

- **MarketsMojo:** Downgraded the stock from **"Strong Buy"** to **"Buy"** on Jan 27, 2026. The rationale cited was that while fundamentals remain robust (ROE ~22%), the valuation has become stretched following the recent run-up.
- **ICICI Direct:** Maintained a **BUY** rating post-Q3 results, revising their target price upward to **INR 7,200** (Jan 30, 2026), citing strong deal momentum and AI-led differentiation.
- **InCred Equities:** Maintained a **HOLD** rating but raised their target price to **INR 6,863**, balancing the strong financial services/healthcare growth against rich valuations.
- **Nuvama:** Reiterated a **BUY** rating earlier in the week, highlighting strong operational performance relative to peers.

3) Other Impacting News

- **AI Monetization Success:** Management highlighted significant traction in its AI-led platforms, specifically **SASVA**, which is driving vendor consolidation deals. The company reported a 150 bps margin improvement specifically from tool-driven/AI pricing models, offsetting some cost pressures.
- **Labor Code Impact:** The one-time charge related to "New Labour Codes" was a key talking point in the

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earnings call. Analysts are monitoring this to ensure it is indeed non-recurring and won't drag margins in Q4 FY26.

- **Sector Sentiment:** The broader Indian IT sector is seeing a "mixed" trend this week. While mid-tier IT firms like Persistent are outperforming large-caps in growth rates, the "higher-for-longer" valuation concern is causing rotation out of high-flying mid-caps into defensive large-caps.

4) Latest Analyst Targets (Post-Q3 FY26 Results)

The consensus view remains "Outperform," but the upside is viewed as limited in the short term due to the stock's premium valuation multiple (trading significantly above sector median P/E).

Brokerage / Firm	Rating	Target Price (INR)	Outlook / Key Rationale
ICICI Direct	Buy	7,200	Strong growth in BFSI & Healthcare; AI deal wins.
Motilal Oswal	Buy	7,600	Projecting top-tier revenue growth (19% CAGR).
InCred Equities	Hold	6,863	Valuation concerns despite strong execution.
Sharekhan	Buy	5,010*	Target under review/lagging recent price action.
Consensus Mean	Outperform	6,817	Average of ~35 analyst estimates.

**Note: Some targets may be in the process of revision following the immediate Q3 earnings release.*

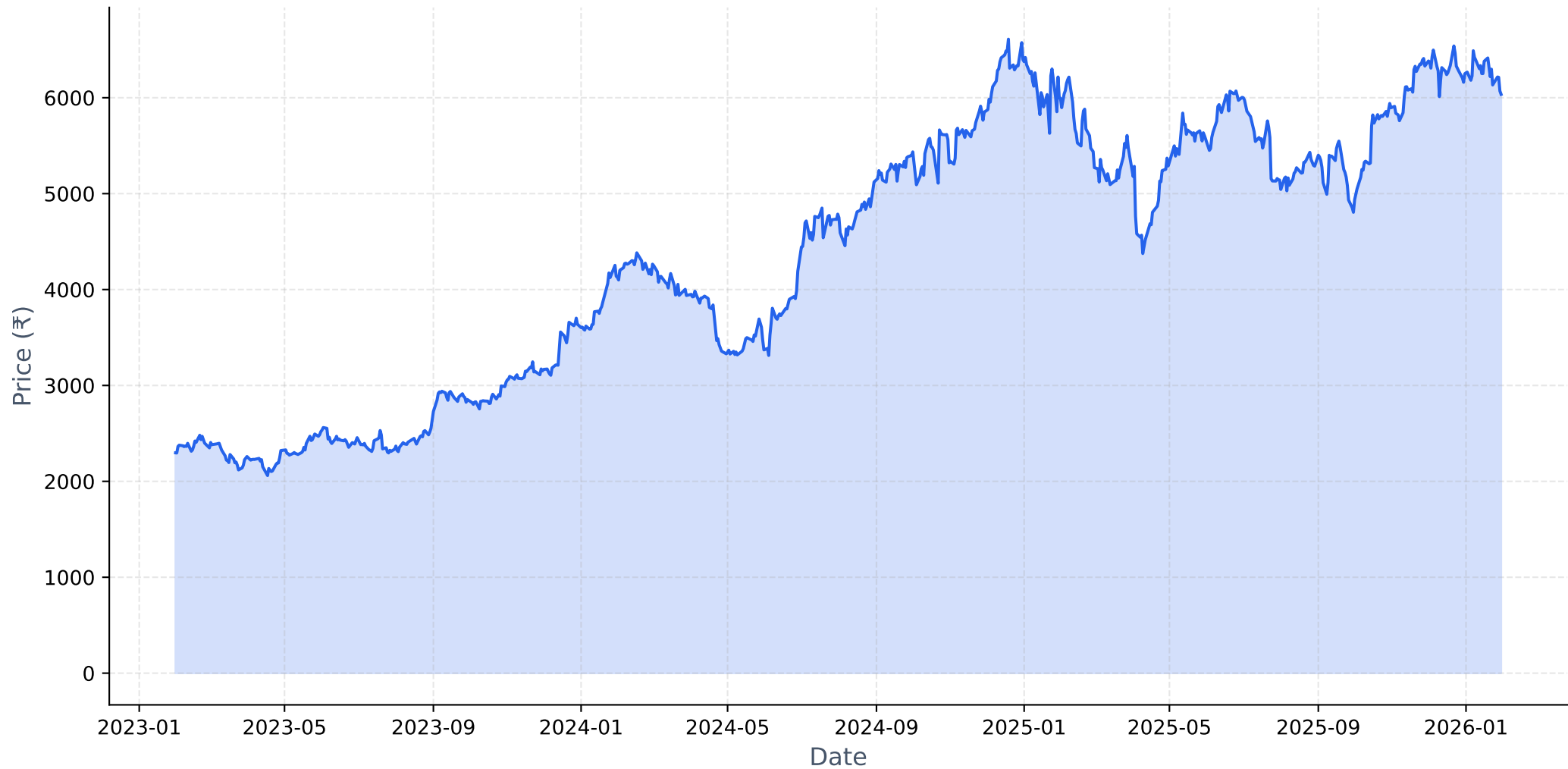
Stock Detailed Analysis Report

PERSISTENT.NS

Current Price: ₹6035.00

Generated: 2026-01-31 11:33

PERSISTENT.NS - 3 Year Daily Price Chart



Long-term Fundamental Analysis (4 Years)

Metric	Is Growing?	Accelerating?	1Y Growth	3Y CAGR
Revenue	Yes	No	21.56%	27.87%
Net Income	Yes	Yes	28.05%	26.58%
ROE	Yes	No	0.46%	2.63%
EPS	Yes	No	25.92%	26.40%

Short-term Fundamental Analysis (6 Quarters)

Metric	Is Growing?	Recent QoQ	Avg QoQ
Revenue	Yes	13.34%	6.93%
Net Income	Yes	3.42%	7.92%
ROE	Yes	7.23%	7.23%
EPS	Yes	2.62%	7.56%

PERSISTENT.NS - Relative Strength Analysis

== OVERVIEW ==:

Benchmark Index:	^CNXIT
Sector:	IT
Classification:	Neutral
RS Score:	50.5/100
:	

== RS RATIOS ==:

1M RS:	0.972 [Neutral]
3M RS:	0.958 [Neutral]
6M RS:	1.096 [Leader]
1Y RS:	1.050 [Leader]
:	

== TURNAROUND ANALYSIS ==:

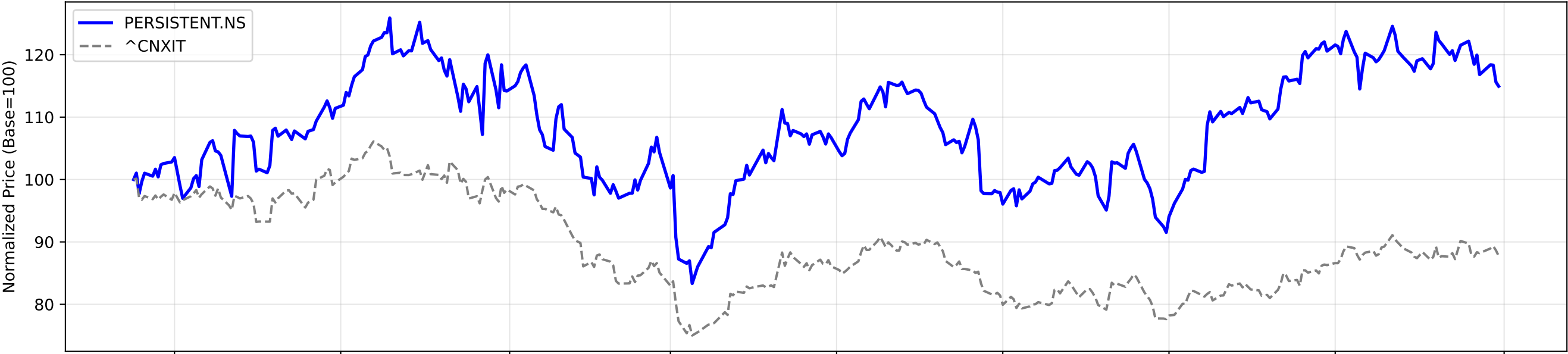
Turnaround Status:	Not Detected
:	

SIGNAL CRITERIA::

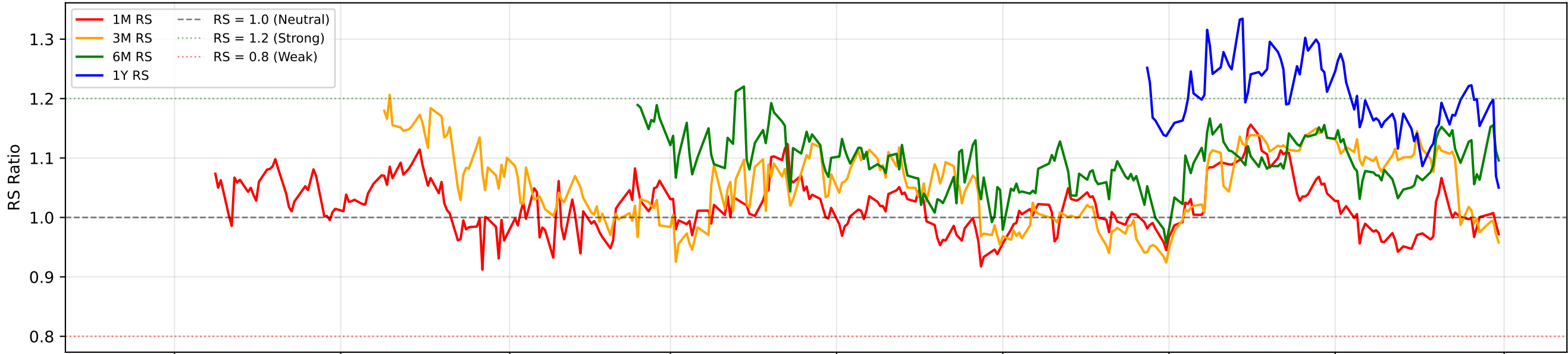
✓ Emerging RS:	1M (0.972) > 3M (0.958)
✗ Medium-term Lagging:	Not lagging
✗ Performance Improving:	Not improving

Relative Strength Analysis: PERSISTENT.NS vs ^CNXIT
Classification: Neutral

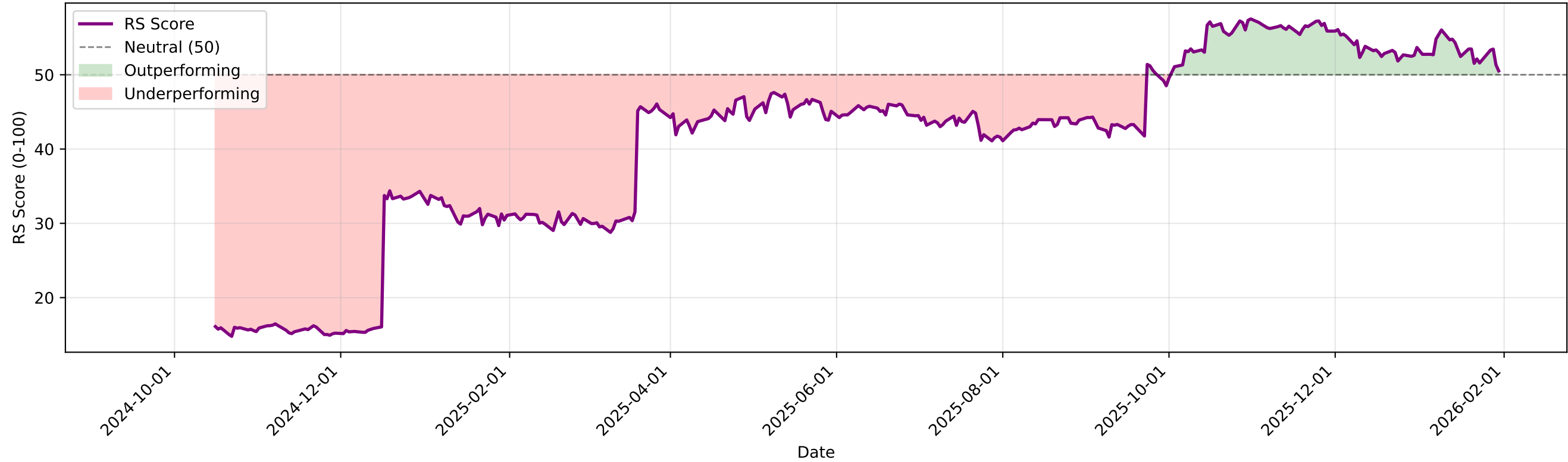
Price Performance Comparison (Normalized)



RS Ratio Trends (Multiple Timeframes)



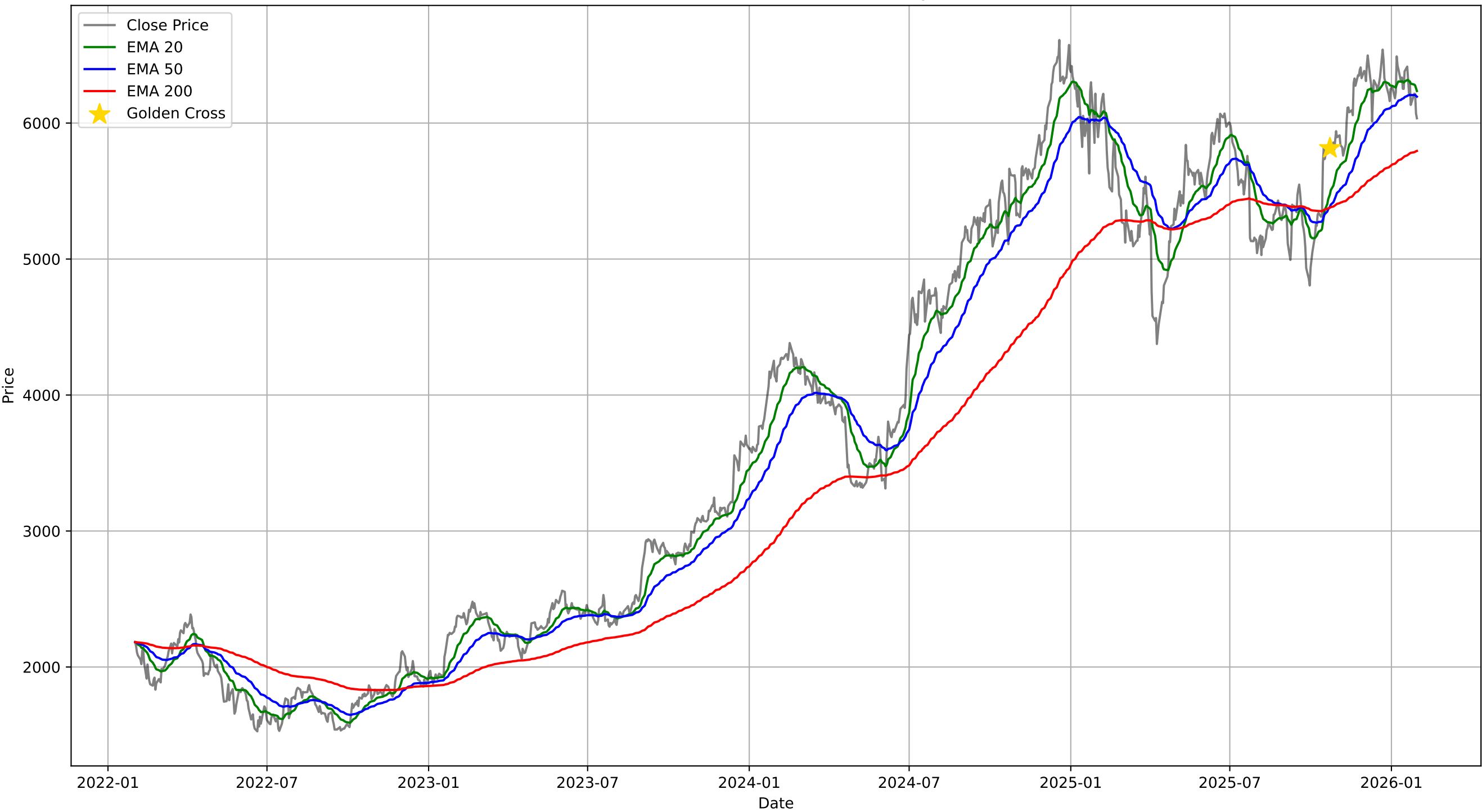
RS Composite Score Timeline



PERSISTENT.NS - EMA Crossover Summary

EMA 20:	6235.41
EMA 50:	6194.20
EMA 200:	5794.84
Trend Status:	Strong Uptrend
Golden Cross Date:	2025-10-23 00:00:00+05:30
Golden Cross Price:	5815.04

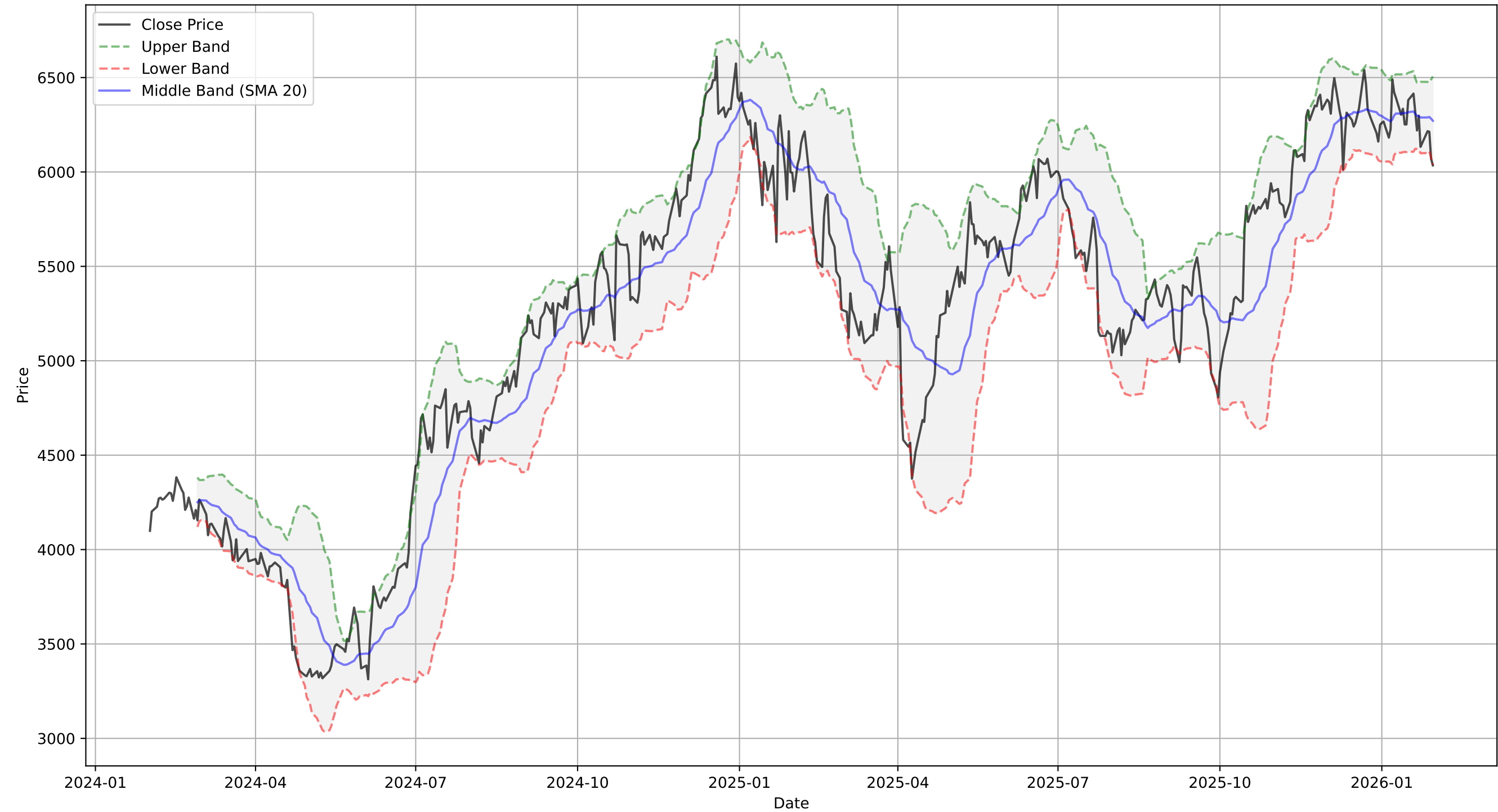
PERSISTENT.NS EMA Crossover Analysis



PERSISTENT.NS - Bollinger Bands Summary

Current Price:	6035.00
Upper Band:	6505.72
Middle Band (SMA 20):	6271.08
Lower Band:	6036.44
%B:	-0.0031
Band Width:	0.0748
Status:	Below Lower Band
Signal:	None

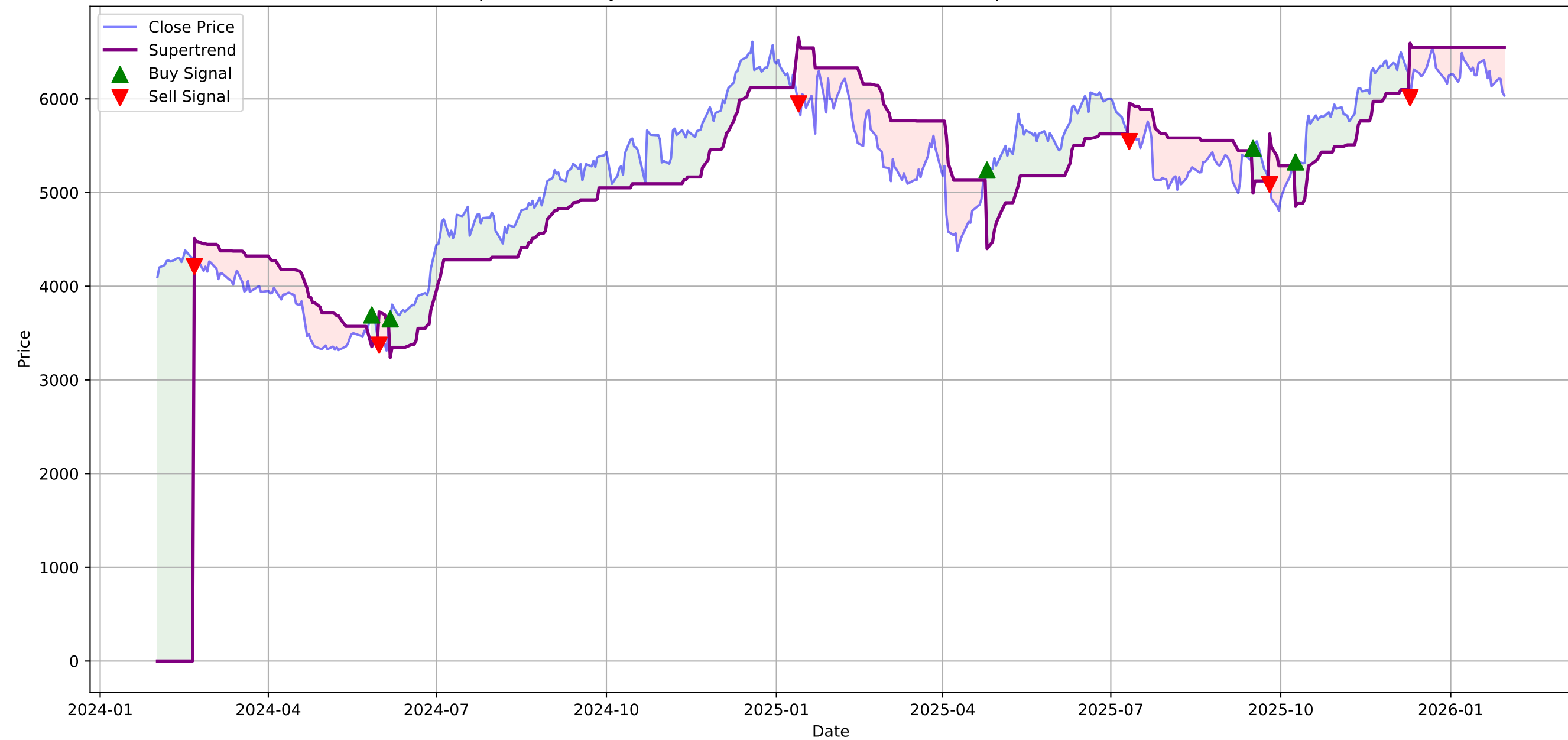
PERSISTENT.NS Bollinger Bands (20, 2) Analysis



PERSISTENT.NS - Supertrend Summary

Status:	DOWNTREND (Sell)
Supertrend Value:	6548.72
Signal Identified On:	2025-12-10

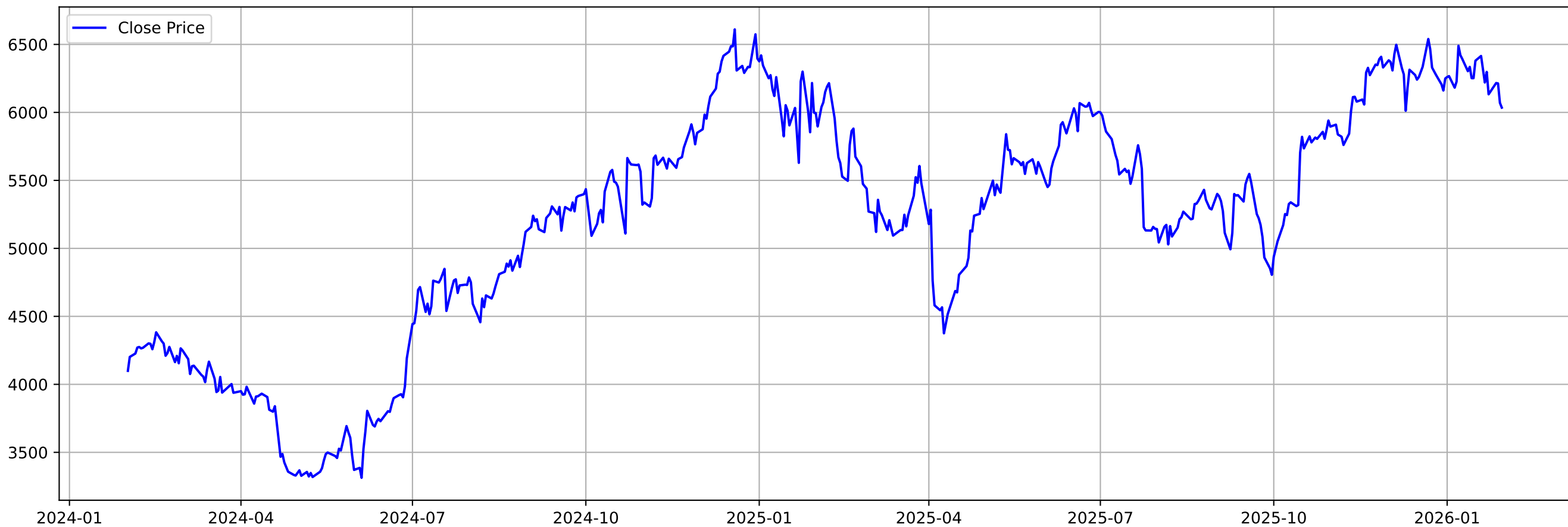
Supertrend Analysis for PERSISTENT.NS (Period: 14, Multiplier: 3.0, Interval: 1d)



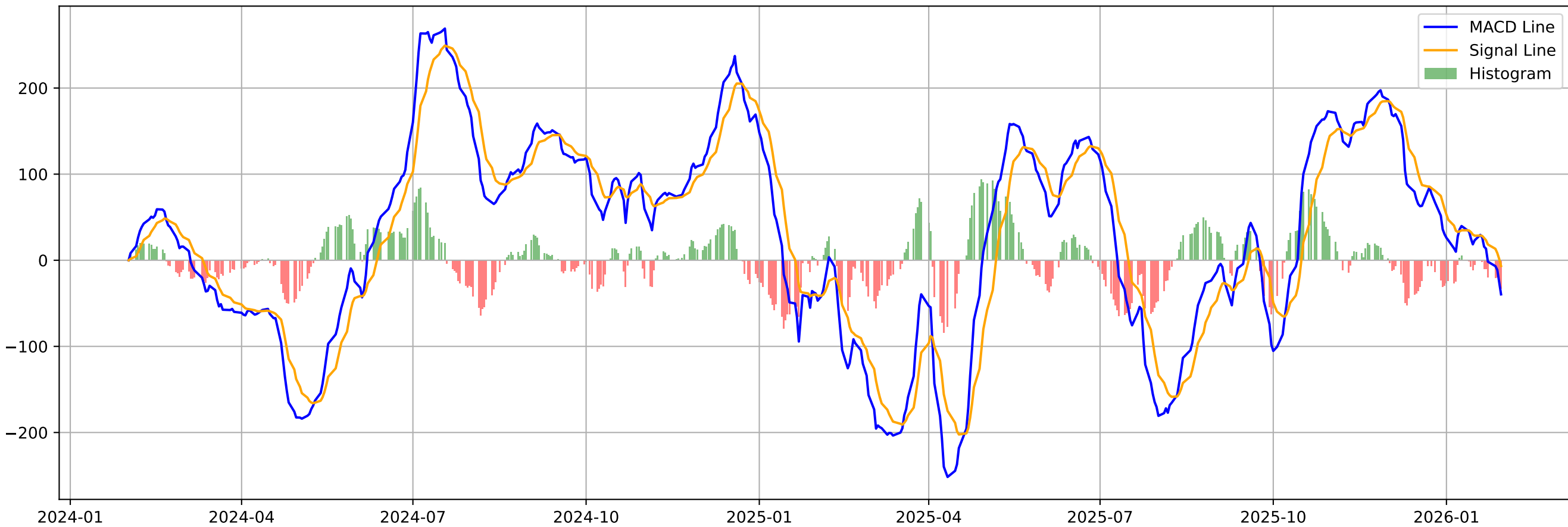
PERSISTENT.NS - MACD Summary

MACD Line:	-39.59
Signal Line:	-6.63
Histogram:	-32.96
Trend:	Bearish
Momentum:	Strengthening
Signal:	None

PERSISTENT.NS Price



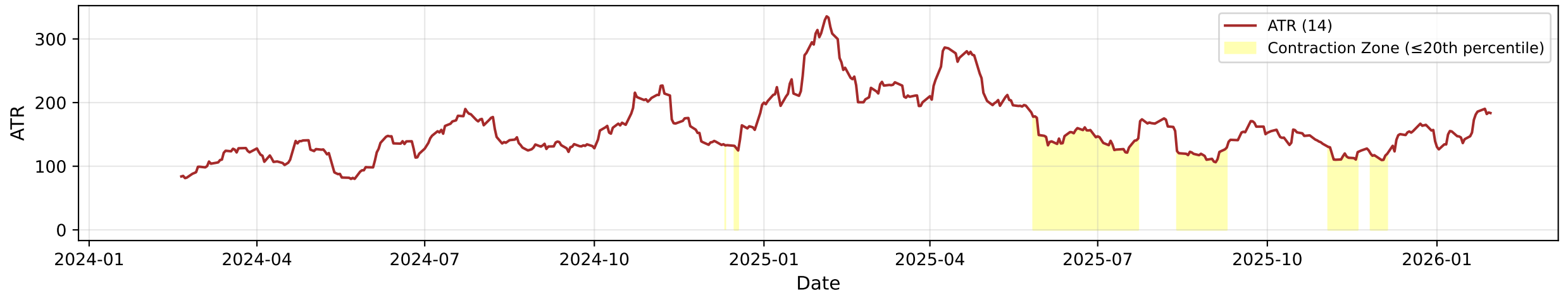
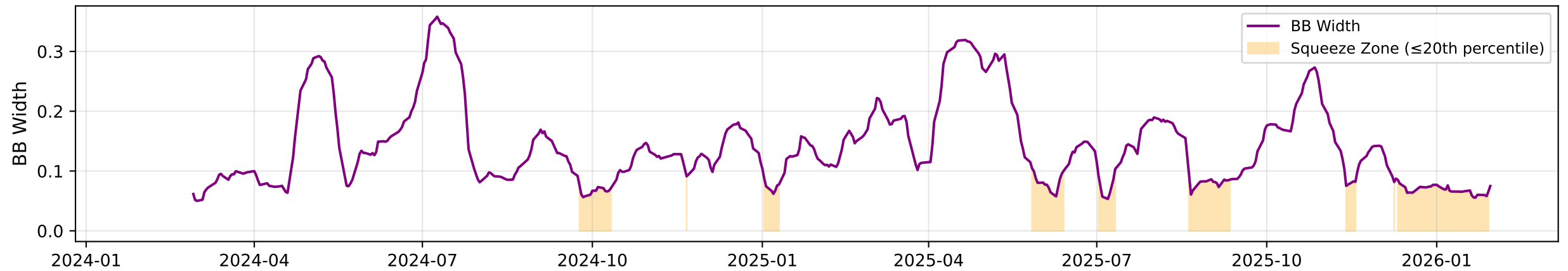
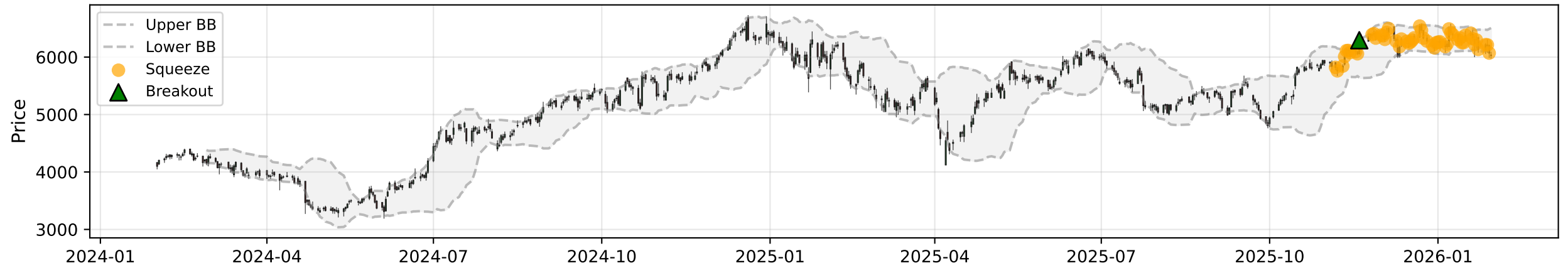
PERSISTENT.NS MACD (12, 26, 9)



PERSISTENT.NS - Volatility Squeeze Summary

BB Width:	0.0748
ATR:	183.5982
Total Signals:	53
Signal 1:	BB Squeeze at 2026-01-22 00:00:00+05:30 (Price: 6297.91)
Signal 2:	BB Squeeze at 2026-01-23 00:00:00+05:30 (Price: 6133.00)
Signal 3:	BB Squeeze at 2026-01-27 00:00:00+05:30 (Price: 6216.00)
Signal 4:	BB Squeeze at 2026-01-28 00:00:00+05:30 (Price: 6213.00)
Signal 5:	BB Squeeze at 2026-01-29 00:00:00+05:30 (Price: 6070.00)

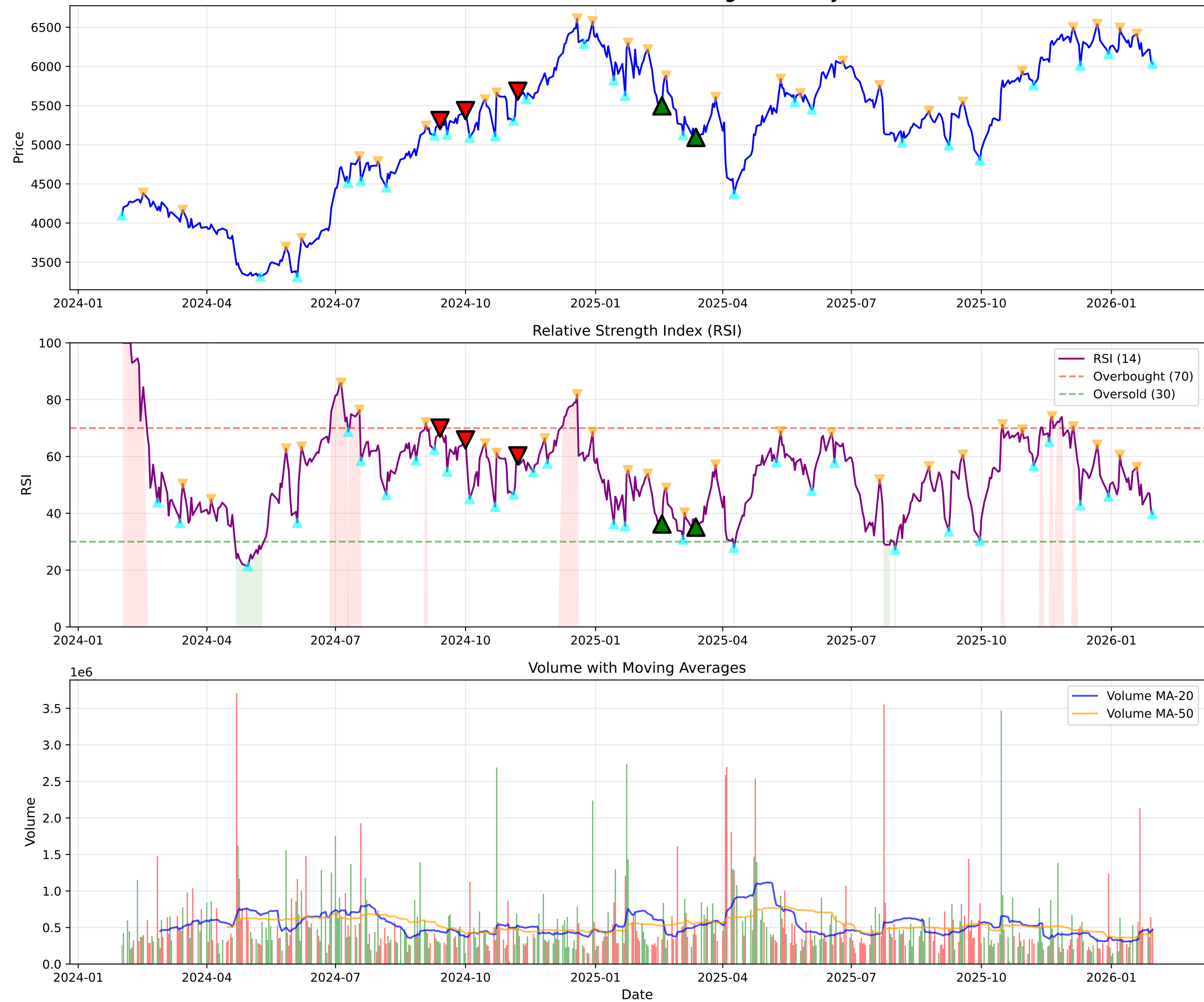
PERSISTENT.NS - Volatility Squeeze Analysis



PERSISTENT.NS - RSI-Volume Summary

Current RSI:	39.80
Current Volume:	486255
Volume MA 20:	467059
Bullish Divergences:	2
Bearish Divergences:	3
Bullish Div 1:	Date: 2025-02-17 00:00:00+05:30, Price: 5496.71
Bullish Div 2:	Date: 2025-03-13 00:00:00+05:30, Price: 5093.70
Bearish Div 1:	Date: 2024-10-01 00:00:00+05:30, Price: 5435.42
Bearish Div 2:	Date: 2024-11-07 00:00:00+05:30, Price: 5682.69

PERSISTENT.NS RSI-Volume Divergence Analysis



PERSISTENT.NS - Volume Analysis

== VOLUME ANALYSIS ==:

Status:

33 Signals Detected

:

2026-01-14 [-]:

Distribution Day

2026-01-20 [-]:

Distribution Day

2026-01-21 [-]:

Climax Volume (Churning)

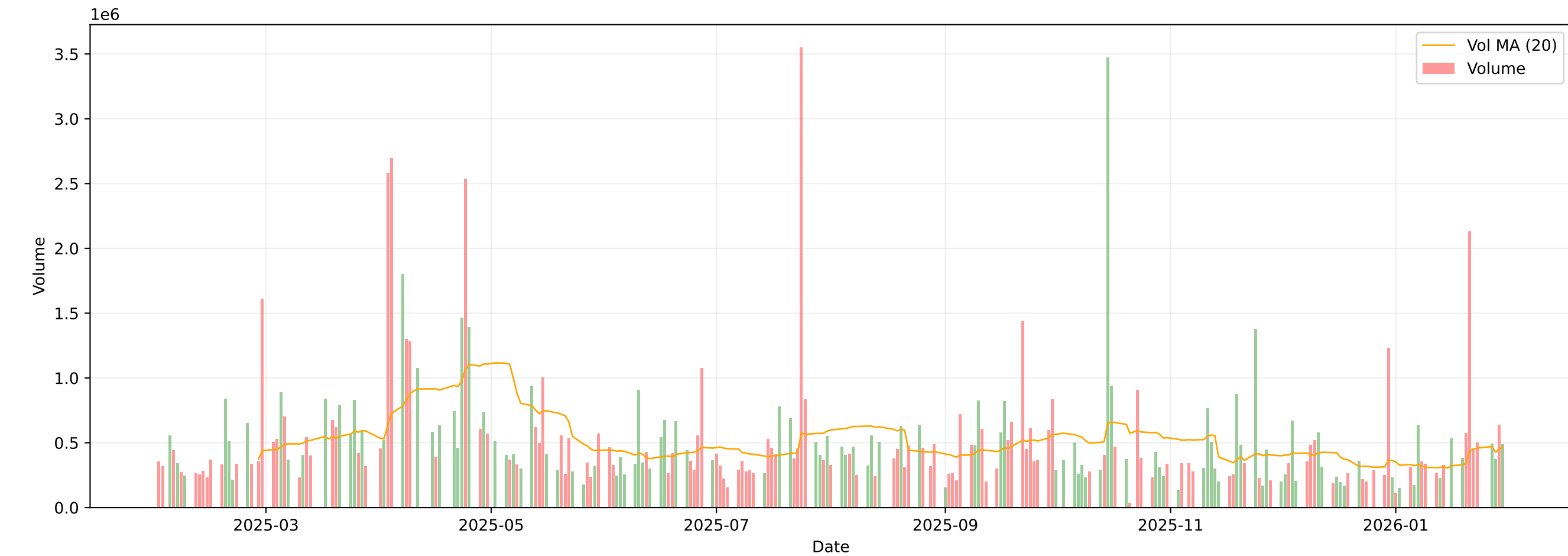
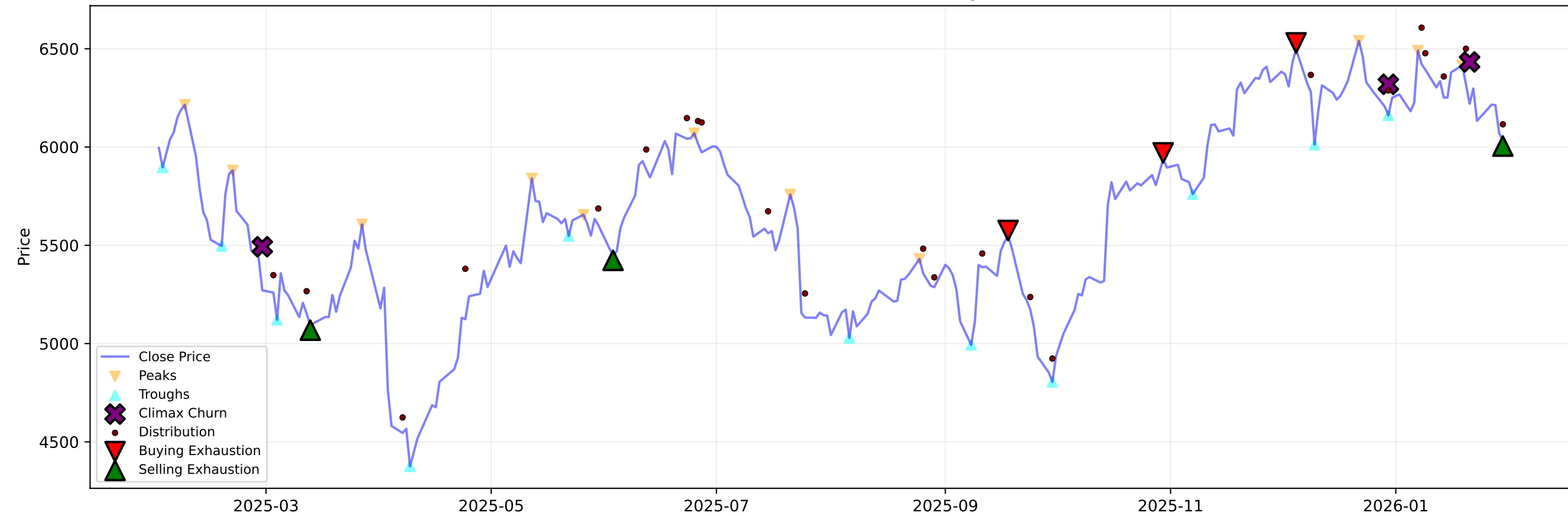
2026-01-30 [-]:

Distribution Day

2026-01-30 [+]:

Selling Exhaustion (Bullish Div)

PERSISTENT.NS - Volume Analysis



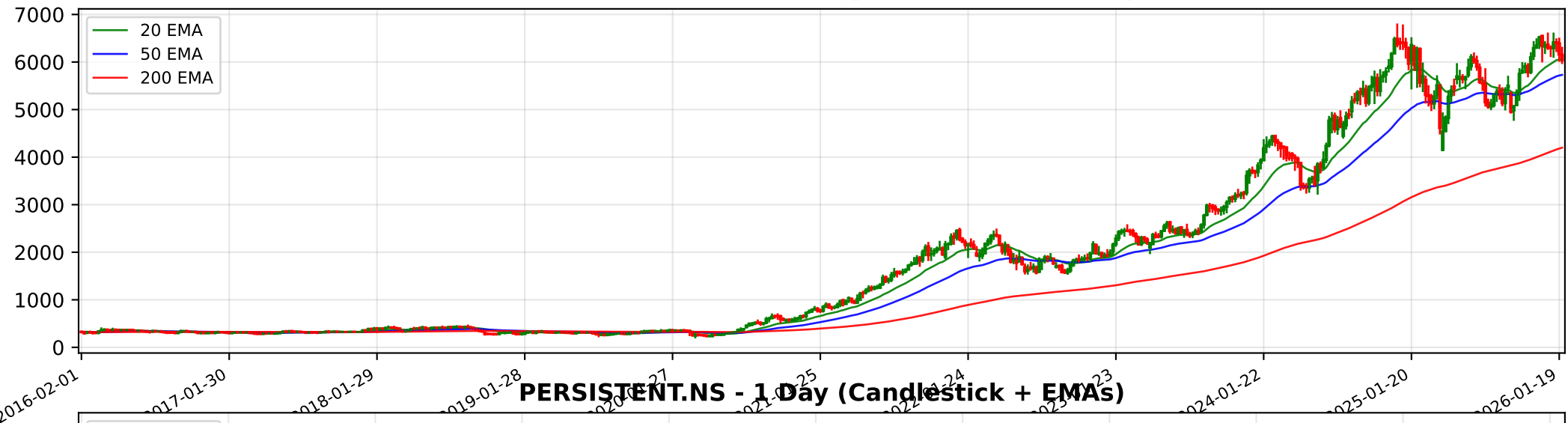
Multi-Timeframe Supertrend Analysis

Timeframe	Status	Value	Last Price	Signal Date
1 Week	UPTREND (Buy)	5882.88	6035.0	2025-10-13
1 Day	DOWNTREND (Sell)	6572.21	6035.0	2025-12-10
15 Min	DOWNTREND (Sell)	6076.57	6035.0	2026-01-29

Multi-Timeframe MACD Analysis

Timeframe	Trend	Momentum	Signal
1 Week	Bearish	Weakening	Bearish Crossover (Sell)
1 Day	Bearish	Strengthening	No Signal
15 Min	Bullish	Strengthening	No Signal

PERSISTENT.NS - 1 Week (Candlestick + EMAs)



PERSISTENT.NS - 1 Day (Candlestick + EMAs)



PERSISTENT.NS - 15 Min (Candlestick + EMAs)



Trendlyne Snapshot - PERSISTENT_main

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MARKETS / SECTOR : SOFTWARE & SERVICES / INDUSTRY : IT CONSULTING & SOFTWARE / PERSISTENT SYSTEMS LTD.

Persistent Systems Ltd. ⓘ

NSE: PERSISTENT | BSE: 533179

Persistent Systems Live Share Price Today, Share Analysis and Chart

■ ■ ■ Expensive Performer ⓘ

503.3K

NSE+BSE Volume

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

6035.00

-35.00 (-0.58%)

↑ 45.46% Gain from 52W Low

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About

Persistent Systems Key Metrics

Preset Metrics Preset Metrics

My Metrics Default

Market Capitalization > High in Industry	94,387.4	PE TTM > High in Industry	54.5	PEG TTM > High in Industry	1.7	Price to Book > High in Industry	
Institutional holding current Qtr % > High in Industry	52.6	Revenue Growth Qtr YoY % > Above Industry Median	23.4	Operating Revenue growth TTM % > Below Industry Median	23.5	Net Profit Qtr Growth YoY % > Below Industry Median	
Net Profit TTM Growth % > Below Industry Median	31.2	Operating Profit Margin Qtr % > Below Industry Median	19.4	Operating Profit Margin TTM % > Above Industry Median	18.7	Piotroski Score > High in Industry	
Rel Perf vs Nifty50 quarter% >	3.4	Rel Perf vs Sector quarter% >	-0.9	ROE Annual % > Below Industry Median	22.2		

All financials are in INR Cr and price data in INR

Durability & Valuation Scores

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Momentum Score ⓘ

51.3 /100

Technically Neutral

FORECASTER

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Expensive Performer

These stocks are strong in quality but with mid-range technicals. Their valuations are expensive

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Key Metrics

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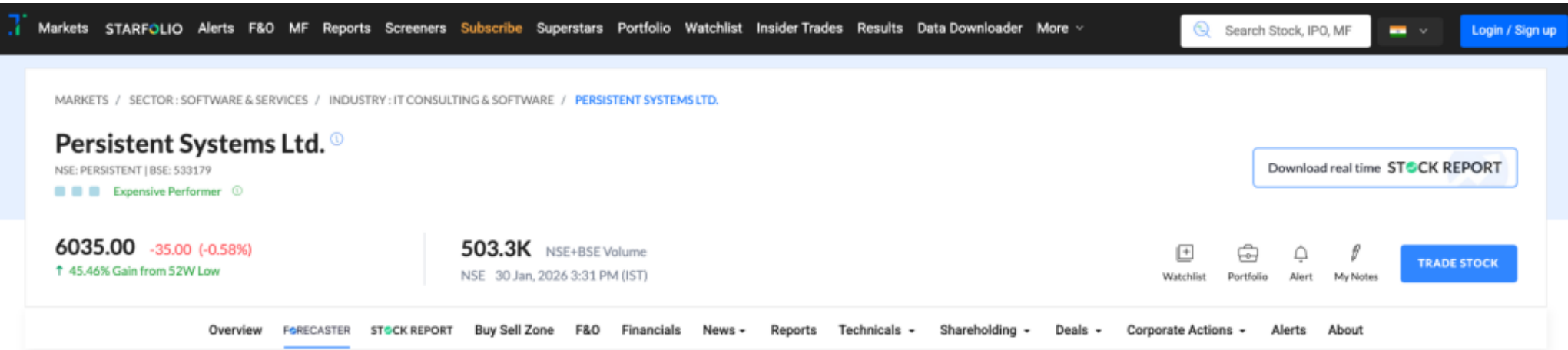
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Documents

Corporate actions

Company Profile

Trendlyne Snapshot - PERSISTENT_forecaster



Persistent Systems - PERSISTENT - stock price prediction, stock forecast, target price, analyst ratings from 35 analysts

Persistent Systems has a share price target of Rs 6818, revenue growth forecast of 22.5%, and profit growth estimate of 33.5% for FY26, based on top 35 analyst calls.



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SAMPLE DATA BELOW

