

ITI Morning Boost

July 03, 2025

*All price's mentioned in report are based on previous day closing bases.

NIFTY – 25,553.40 (Daily Chart)



- In Wednesday's trading session, the bears took control of the Nifty, remaining dominant throughout the day and leading to a negative close.

- On the daily chart, the index formed a bearish candle, indicating selling pressure and a gradual move toward the 20-day exponential moving average (20 DEMA) support level. The RSI is trending downward, signaling weakening momentum, though it continues to stay above the midline — a sign of underlying strength. For the index to regain bullish momentum, a sustained breakout above the recent high of 25,669 will be crucial.

- For Thursday's session, 25,395 will act as the initial support level, while 25,500 will serve as the initial resistance.

BANK NIFTY – 56,999.20 (Daily Chart)



- In Wednesday's trading session, the banking index opened on a positive note but quickly reversed course, moving lower and remaining under pressure throughout the day, resulting in a negative close.

- On the daily chart, the index formed a strong bearish candle, indicating clear selling pressure. It is gradually approaching the support of the 20-day exponential moving average (20 DEMA). The RSI is also trending downward after hovering near the overbought zone, signaling weakening momentum. To resume its upward journey, the index must breach and sustain above 57,630, which remains a key resistance level.

- For Thursday's session, 56,850 will act as the initial support level, while 57,065 will serve as the initial resistance.





PNB : Punjab National Bank's global advances jumped 9.9% on a yearly basis to Rs 11.3 lakh crore in the April-June quarter, according to the provisional quarterly business update filed with the exchanges on Wednesday. The lender's domestic advances also saw a similar advance to Rs 10.8 lakh crore, as per the filing. The bank reported a 13% growth in global deposits at Rs 15.9 lakh crore in the first quarter, with domestic deposits also rose 12% to Rs 15.4 lakh crore.

INDIANB : Indian Bank on Wednesday reported a 10.2% year-on-year rise in total business for the quarter ended June 30, 2025, at ₹13.44 lakh crore, up from ₹12.20 lakh crore in the corresponding period last year, according to provisional figures disclosed to the stock exchanges.

DMART : Avenue Supermarts, the operator of the DMart retail chain, reported a 16% year-on-year increase in standalone revenue for the first quarter of FY26, reaching ₹15,932.12 crore.

CMP- 113.85
IMPACT- **POSITIVE**

CMP- 650.65
IMPACT- **POSITIVE**

CMP- 4,391.90
IMPACT- **POSITIVE**



- Labour ministry has worked out a fool-proof mechanism using digital tools to implement the Rs 1.07-lakh crore Employment Linked Incentive (ELI) scheme, which aims to create 3.5 crore jobs over the next two years. The scheme, approved by the Union Cabinet on Tuesday, will be implemented through the social security schemes run by retirement fund body EPFO.
- The Reserve Bank of India said that real time credit reporting to credit information companies (CIC) would enhance underwriting results in timely reflection of borrowers' action such as loan closures or repayments and deliver a superior consumer experience. Since January 1, lenders are reporting credit data once in 14 days, an improvement from the earlier system of monthly data submission.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

Company	Price	Change	% Change		Company	Price	Change	% Change
Tata Steel	165.88	5.82	3.64		Shriram Finance	676.90	-19.55	-2.81
JSW Steel	1,059.90	30.30	2.94		HDFC Life	789.70	-20.20	-2.49
Asian Paints	2,419.40	49.90	2.11		IndusInd Bank	857.65	-21.45	-2.44
UltraTechCement	12,436.00	226.00	1.85		Bajaj Finserv	2,007.90	-45.90	-2.23
Maruti Suzuki	12,622.00	180.00	1.45		Larsen	3,596.80	-69.90	-1.91

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

Company	Price	Change	% Change		Company	Price	Change	% Change
TATACOMM	1,808.00	82.2	4.76		PAGEIND	47,550.00	-645	-1.34
APOLLOTYRE	467.95	20.25	4.52		SOLARINDS	16,955.00	-241	-1.40
ABFRL	77.75	3.24	4.35		HYUNDAI	2,108.90	-131.8	-5.88
MANKIND	2,385.00	98	4.29		TIINDIA	2,987.90	-99.1	-3.21
TATASTEEL	165.95	5.89	3.68		WAAREEENER	2,972.00	-91.1	-2.97



OPEN INTEREST GAINERS

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
BLUESTARCO	1,737.40	31.60	1.85%	14,43,000	20.75%
KFINTECH	1,328.60	-13.40	-1.00%	6,31,350	17.90%
PGEL	750.70	22.90	3.15%	29,05,700	15.66%
CGPOWER	668	-18.95	-2.76%	1,69,21,800	14.55%
PPLPHARMA	205.38	-0.51	-0.25%	97,72,500	14.47%

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
TATACOMM	1,813.70	73.50	4.22%	28,54,600	-12.53%
AUBANK	821.85	-16.65	-1.99%	1,60,08,000	-7.05%
RBLBANK	249.67	-11.09	-4.25%	7,93,49,600	-6.51%
BALKRISIND	2,570.70	80.50	3.23%	20,70,300	-6.50%
COLPAL	2,448	31.70	1.31%	44,35,650	-5.85%

INDEX HIGHEST OI

F&O Ban list
RBLBANK
-
-

Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
31/07/25	NIFTY	26,000	25,000	1.19
31/07/25	BANKNIFTY	56,000	56,000	0.96



FII & DII TRADING ACTIVITY CASH

FII Rs Crores				DII Rs Crores		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	25,511.34	29,043.10	-3,531.76	29,616.97	25,809.21	3,807.76
02-Jul-25	13,954.40	15,516.02	-1,561.62	16,695.01	13,658.33	3,036.68
01-Jul-25	11,556.94	13,527.08	-1,970.14	12,921.96	12,150.88	771.08

FII & DII TRADING ACTIVITY STOCK F&O

FII Stock Fut				FII Stock Opt		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	34,108.70	34,729.58	-620.88	94,609.24	95,855.11	-1,245.87
02-Jul-25	17,950.24	17,236.18	714.06	47,206.79	46,940.96	265.83
01-Jul-25	16,158.46	17,493.40	-1,334.94	47,402.45	48,914.15	-1,511.70



*Data in above table is based on previous day closing bases.

TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Ship Building	3.77	2.11	20.82	74.71	253.15	18.57
Oil Drill/Allied	2.64	10.28	5.59	17.67	-18.16	-15.58
Tyres	2.46	4.36	5.17	21.5	-4.7	-8.25
Dry cells	2.44	-2.5	-2.41	2.49	-17.91	-15.19
Ferro Alloys	1.54	2.6	8.64	17.73	-17.04	-11.52



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UPCOMING ECONOMIC EVENTS

Thursday, July 3, 2025	Country	Event's	Forecast		Previous
10:30	IN	S&P Global Services PMI (Jun)	60.7		58.8
18:00	US	Average Hourly Earnings (MoM) (Jun)	0.3%		0.4%
18:00	US	Initial Jobless Claims	239K		236K
18:00	US	Nonfarm Payrolls (Jun)	120K		139K
18:00	US	Unemployment Rate (Jun)	4.3%		4.2%
19:15	US	S&P Global Services PMI (Jun)	53.1		53.1
19:30	US	ISM Non-Manufacturing PMI (Jun)	50.8		49.9
Friday, July 4, 2025					
17:00	IN	FX Reserves, USD			697.94B

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