

ITI Morning Boost

July 04, 2025

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

NIFTY – 25,405.30 (Daily Chart)



- In Thursday's trading session, the Nifty remained sideways for most of the day. However, in the final hour, the index slipped into the red and ended with a negative close.
- On the daily chart, a bearish candle with an upper wick was formed, indicating selling pressure at higher levels. The index is gradually drifting toward its 20-day exponential moving average (20 DEMA) support. To regain bullish momentum, the Nifty must breach and sustain above the 25,670 level.
- For Friday's session, 25,385 will act as the initial support level, while 25,500 will serve as the initial resistance.

BANK NIFTY – 56,791.95 (Daily Chart)



• In Thursday's trading session, the banking index opened on a positive note but lacked follow-through momentum, moving sideways for most of the session. Toward the end, it failed to sustain at higher levels and slipped into the red, resulting in a negative close.

• On the daily chart, the index formed a bearish candle, reflecting selling pressure at higher levels. However, it continues to hold above the 20-day exponential moving average (20 DEMA), which is a positive sign for the bulls. To resume its upward trend, the index must break and sustain above the horizontal resistance level of 57,630.

• For Friday's session, 56,765 will act as the initial support level, while 56,945 will serve as the initial resistance.





BAJFINANCE : Customer franchise as of June 2025 stood at 106.51 million Vs 88.11 million as of June 2024, New loans booked grows 23% to 13.49 million Vs 10.97 million, Assets under management (AUM) soars 25% to Rs 4.41 lakh crore Vs Rs 3.54 lakh crore, Deposits book increases 15% to Rs 72,100 crore Vs Rs 62,774 crore.

RELIANCE : Reliance Retail Ventures (RRVL) announced a strategic minority investment in UK-based FACEGYM, a global innovator in facial fitness and skincare. This marks a pivotal step in RRVL's continued expansion into the high-growth beauty and wellness space.

ONGC : ONGC has signed an agreement with Japan's Mitsui O.S.K. Lines to build, own, and operate two Very Large Ethane Carriers (VLECs). These carriers will transport imported ethane to ONGC Petro Additions (OPaL), a subsidiary of ONGC, for captive feedstock use.

CMP- 910.15
IMPACT- **POSITIVE**

CMP- 1517.80
IMPACT- **POSITIVE**

CMP- 244.05
IMPACT- **POSITIVE**



- India's services sector enjoyed its strongest growth in ten months in June, fuelled by robust demand and cooling price pressures, a survey showed on Thursday. The HSBC final India Services Purchasing Managers' Index (PMI), compiled by S&P Global, climbed to 60.4 in June from 58.8 in May, but was a touch lower than a preliminary estimate of 60.7. The PMI threshold of 50.0 separates growth in activity from contraction.
- External Affairs Minister S Jaishankar said India has officially expressed its concerns to US senator Lindsey Graham on a proposed bill seeking to impose a 500% tariff on countries importing crude oil from Russia. "Regarding Senator Lindsey Graham's bill, any development which is happening in the US Congress is of interest to us if it impacts our interest or could impact our interest. So we have been in touch with Senator Lindsey Graham. The embassy, ambassador have been in touch," Jaishankar told.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

Company	Price	Change	% Change		Company	Price	Change	% Change
Apollo Hospital	7,565.00	124.00	1.67		SBI Life Insura	1,810.20	-46.60	-2.51
Dr Reddys Labs	1,291.30	20.50	1.61		Kotak Mahindra	2,126.60	-42.50	-1.96
Hero Motocorp	4,310.60	66.90	1.58		Bajaj Finance	910.15	-12.85	-1.39
ONGC	244.05	2.98	1.24		Bajaj Finserv	1,980.70	-27.20	-1.35
Maruti Suzuki	12,752.00	130.00	1.03		JSW Steel	1,046.10	-13.80	-1.30

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

Company	Price	Change	% Change		Company	Price	Change	% Change
MOTILALOF5	922	73.30	7.74		NYKAA	202.29	-9.28	-4.4
BOSCHLTD	34,400.00	1960.00	6.03		PNB	110.1	-3.62	-3.29
OIL	453.85	17.05	4.12		ICICIPRULI	637.95	-18.90	-3.16
VOLTAS	1,368.80	34.20	2.7		INDIGO	5,771.00	-190.00	-3.11
BSE	2,825.00	67.70	2.64		SBILIFE	1,803.60	-46.60	-2.87



OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
360ONE	1,233.70	49.70	4.20%	12,65,500	27.76%
BLUESTARCO	1,815.90	78.50	4.52%	18,04,725	25.07%
NYKAA	201.24	-8.17	-3.90%	6,36,56,250	19.68%
KFINTECH	1,338	9.00	0.68%	7,42,050	17.53%
DMART	4,333.80	-61.20	-1.39%	52,24,350	10.57%

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
KAYNES	6,190.50	-120.50	-1.91%	5,55,200	-7.00%
HEROMOTOCO	4,267.20	68.00	1.62%	53,29,350	-6.65%
UNOMINDA	1,105	1.00	0.09%	33,19,800	-5.15%
NMDC	69	0.82	1.20%	24,62,13,000	-5.09%
GAIL	193	0.96	0.50%	8,44,86,150	-4.23%

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	1.20
31/07/25	BANKNIFTY	56,000	56,000	0.93



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	37,184.30	42,197.25	-5,012.95	42,307.37	37,166.55	5,140.82
03-Jul-25	11,672.96	13,154.15	-1,481.19	12,690.40	11,357.34	1,333.06
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	49,969.66	50,768.20	-798.54	1,37,812.43	1,39,442.47	-1,630.04
03-Jul-25	15,860.96	16,038.62	-177.66	43,203.19	43,587.36	-384.17
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	3.71	6.79	19.83	81.14	270.77	18.84
Credit Rating Agencies	2.12	3.65	8.64	41.3	14.13	43.27
Refractories	1.63	2.98	2.6	21.78	1.75	6.61
Diversified	1.58	4.05	8.5	7.7	-2.24	-0.68
Readymade Garments/ Apparells	1.54	3.14	6.74	16.05	-8.54	32.98



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

UPCOMING ECONOMIC EVENTS

Friday, July 4, 2025	Country	Event's	Forecast		Previous
17:00	IN	FX Reserves, USD			697.94B
Tuesday, July 8, 2025					
10:00	AU	RBA Interest Rate Decision (Jul)			3.85%
Wednesday, July 9, 2025					
07:30	NZ	RBNZ Interest Rate Decision			3.25%
20:00	US	Crude Oil Inventories			3.845M
23:30	US	FOMC Meeting Minutes			
Thursday, July 10, 2025					
18:00	US	Initial Jobless Claims			

Disclaimer

This report has been prepared by ITI Securities Broking Limited (hereinafter referred to as ITISBL) to provide information about the company(ies) and/or sector(s), if any, covered in the report and may be distributed by it and/or its affiliated company(ies). ITISBL is a Stock Broker and Depository Participant registered with and regulated by Securities & Exchange Board of India. ITISBL and its affiliates are a full-service, integrated investment banking, investment management, brokerage and financing group.

This report is for personal information of the selected recipient/s and does not constitute to be any investment, legal or taxation advice to you. This research report does not constitute an offer, invitation or inducement to invest in securities or other investments and ITISBL is not soliciting any action based upon it. This report is not for public distribution and has been furnished to you solely for your general information and should not be reproduced or redistributed to any other person in any form. This report does not constitute a personal recommendation or take into account the particular investment objectives, financial situations, or needs of individual clients. Before acting on any advice or recommendation in this material, investors should consider whether it is suitable for their particular circumstances and, if necessary, seek professional advice. The price and value of the investments referred to in this material and the income from them may go down as well as up, and investors may realize losses on any investments. Past performance is not a guide for future performance, future returns are not guaranteed and a loss of original capital may occur. We and our affiliates have investment banking and other business relationships with a some companies covered by our Research Department. Our research professionals may provide input into our investment banking and other business selection processes. Investors should assume that ITISBL and/or its affiliates are seeking or will seek investment banking or other business from the company or companies that are the subject of this material and that the research professionals who were involved in preparing this material may educate investors on investments in such business. The research professionals responsible for the preparation of this document may interact with trading desk personnel, sales personnel and other parties for the purpose of gathering, applying and interpreting information. Our research professionals are paid on the profitability of ITISBL which may include earnings from investment banking and other business.

ITISBL generally prohibits its analysts, persons reporting to analysts, and members of their households from maintaining a financial interest in the securities or derivatives of any companies that the analysts cover. Additionally, ITISBL generally prohibits its analysts and persons reporting to analysts from serving as an officer, director, or advisory board member of any companies that the analysts cover. Our salespeople, traders, and other professionals or affiliates may provide oral or written market commentary or trading strategies to our clients that reflect opinions that are contrary to the opinions expressed herein, and our proprietary trading and investing businesses may make investment decisions that are inconsistent with the recommendations expressed herein. In reviewing these materials, you should be aware that any or all of the foregoing among other things, may give rise to real or potential conflicts of interest. ITISBL and its affiliated company(ies), their directors and employees and their relatives may; (a) from time to time, have a long or short position in, act as principal in, and buy or sell the securities or derivatives thereof of companies mentioned herein. (b) be engaged in any other transaction involving such securities and earn brokerage or other compensation or act as a market maker in the financial instruments of the company(ies) discussed herein or act as an advisor or lender/borrower to such company(ies) or may have any other potential conflict of interests with respect to any recommendation and other related information and opinions; however the same shall have no bearing whatsoever on the specific recommendations made by the analyst(s), as the recommendations made by the analyst(s) are completely independent of the views of the affiliates of ITISBL even though there might exist an inherent conflict of interest in some of the stocks mentioned in the research report. Reports based on technical and derivative analysis center on studying charts company's price movement, outstanding positions and trading volume, as opposed to focusing on a company's fundamentals and, as such, may not match with a report on a company's fundamental analysis. In addition ITISBL has different business segments / Divisions with independent research separated by Chinese walls catering to different set of customers having various objectives, risk profiles, investment horizon, etc, and therefore may at times have different contrary views on stocks sectors and markets.

Unauthorized disclosure, use, dissemination or copying (either whole or partial) of this information, is prohibited. The person accessing this information specifically agrees to exempt ITISBL or any of its affiliates or employees from, any and all responsibility/liability arising from such misuse and agrees not to hold ITISBL or any of its affiliates or employees responsible for any such misuse and further agrees to hold ITISBL or any of its affiliates or employees free and harmless from all losses, costs, damages, expenses that may be suffered by the person accessing this information due to any errors and delays. The information contained herein is based on publicly available data or other sources believed to be reliable. Any statements contained in this report attributed to a third party represent ITISBL's interpretation of the data, information and/or opinions provided by that third party either publicly or through a subscription service, and such use and interpretation have not been reviewed by the third party. This Report is not intended to be a complete statement or summary of the securities, markets or developments referred to in the document. While we would endeavour to update the information herein on reasonable basis, ITISBL and/or its affiliates are under no obligation to update the information. Also there may be regulatory, compliance, or other reasons that may prevent ITISBL and/or its affiliates from doing so. ITISBL or any of its affiliates or employees shall not be in any way responsible and liable for any loss or damage that may arise to any person from any inadvertent error in the information contained in this report. ITISBL or any of its affiliates or employees do not provide, at any time, any express or implied warranty of any kind, regarding any matter pertaining to this report, including without limitation the implied warranties of merchantability, fitness for a particular purpose, and non-infringement. The recipients of this report should rely on their own investigations. This report is intended for distribution to investors. Recipients who are not investors should seek advice of their independent financial advisor prior to taking any investment decision based on this report or for any necessary explanation of its contents ITISBL and its associates may have managed or co-managed public offering of securities, may have received compensation for investment banking or merchant banking or brokerage services, may have received any compensation for products or services other than investment banking or merchant banking or brokerage services from the subject company in the past 12 months. ITISBL and its associates have not received any compensation or other benefits from the subject company or third party in connection with the research report. Subject Company may have been a client of ITISBL or its associates during twelve months preceding the date of distribution of the research report. ITISBL and/or its affiliates and/or Research analyst / or relative of research analyst or Employees may have interests/positions, financial or otherwise of over 1% at the end of the month immediately preceding the date of publication of the research in the securities mentioned in this report. To enhance transparency, ITISBL has incorporated a Disclosure of Interest Statement in this document. This should, however, not be treated as endorsement of the views expressed in the report. Neither the Research Analysts nor ITISBL have been engaged in market making activity for the companies mentioned in the report. ITISBL and/or its affiliates and/or Research analyst/ relative of research analyst have not any material conflict of interest at the time of publication of this report. There are no material disciplinary action that been taken by any regulatory authority impacting equity research analysis activities Please ensure that you have read "Risk Disclosure Document for Capital Market and Derivatives Segments" as prescribed by Securities and Exchange Board of India before investing in Indian Securities Market. In so far as this report includes current or historic information, it is believed to be reliable, although its accuracy and completeness cannot be guaranteed.

Analyst Certification

The views expressed in this research report accurately reflect the personal views of the analyst(s) about the subject securities or issues, and no part of the compensation of the research analyst(s) was, is, or will be directly or indirectly related to the specific recommendations and views expressed by research analyst(s) in this report. The research analysts, strategists, or research associates principally responsible for preparation of ITISBL research receive compensation based upon various factors, including quality of research, investor client feedback, stock picking, competitive factors and firm revenues

Disclosure of Interest Statement - Companies where there is interest

Analyst ownership of the stock: No

Served as an officer, director or employee: No

Regional Disclosures (outside India)

This report is not directed or intended for distribution to or use by any person or entity resident in a state, country or any jurisdiction, where such distribution, publication, availability or use would be contrary to law, regulation or which would subject ITISBL & its group companies to registration or licensing requirements within such jurisdictions.

ITI Securities Broking Limited

SEBI – Research Analyst REG. NO. : INH000001535

SEBI REG. NO: NSE&BSE: INZ000005835, CDSL-IN-DP-70-2015, AMFI Reg. No. ARN-12576,

CIN NO: U74120MH1994PLC077946

ITI House, 36, Dr. R. K. Shirodkar Road,

Parel, Mumbai - 400 012,

Boardline - (91) 22 69093600 Fax- 022 69093700

For queries, write to us at iti.research@itiorg.com