

ITI Morning Boost

December 03, 2025

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

NIFTY – 26,032.20 (Daily Chart)



- In Tuesday's trading session, the Nifty opened on a negative note and remained under pressure throughout the day, which resulted in a negative closing.

- On a daily scale, the index has formed a small bearish candle but managed to hold the support of the 20 DEMA, which is a positive sign for the bulls. However, the RSI is gradually moving in the south direction, indicating some weakness in the index and suggesting a cautious approach.

- For Wednesday's trading session, 26,000 will act as an initial support level, while on the higher end, 26,100 will act as an initial resistance level.

BANK NIFTY – 59,273.80 (Daily Chart)



• In Tuesday's trading session, the banking index opened on a negative note and moved sideways for most of the day. It was only toward the end of the session that the index resumed its downward journey, extending its intraday losses and eventually closing on a negative note.

• On the daily scale, the index formed a small red candle with a long upper wick, indicating selling pressure at higher levels. The RSI is gradually moving south, suggesting weakness in the index. However, the index managed to hold the support of the 20 DEMA, which remains a positive sign for the bulls.

• For Wednesday's trading session, 59,250 will act as an initial support level, while on the higher side, 59,630 will serve as an initial resistance level.





INDIACEM: The company announced that its subsidiaries — PT Coromandel Minerals Resources in Indonesia and Raasi Minerals Pte Ltd in Singapore — have signed a share sale and purchase agreement to sell their entire stake in PT Adcoal Energindo, Indonesia, for a proposed value of IDR 10 billion (about ₹5.4 crore).

IRFC: The state-run company announced that it has entered into a loan agreement with Sumitomo Mitsui Banking Corporation's GIFT City branch in Gandhinagar, Gujarat, to secure an external commercial borrowing (ECB) worth ₹300 million (equivalent to \$300 million).

INDIGO: IndiGo announced that it has received a penalty order of ₹117.52 crore concerning input tax credit, and the airline plans to contest the decision. The order was issued by the Joint Commissioner of Central Tax and Central Excise under the CGST Kochi Commissionerate in Kerala.

HINDCOPPER: The state-run company announced that it has signed a Memorandum of Understanding with NTPC Mining Ltd (NML) to work together on copper and other critical mineral development.

CMP- 382.95
IMPACT- **POSITIVE**

CMP- 116.42
IMPACT- **POSITIVE**

CMP- 5,697.50
IMPACT- **POSITIVE**

CMP- 338.60
IMPACT- **NEGATIVE**



- Indian seafood exports saw a strong rise in the first seven months of FY26. Shipments to the European Union, China, Vietnam, Russia, and the United Kingdom surged. This growth helped compensate for reduced exports to the United States. The European Union saw a substantial increase in seafood value. Russia also increased its imports from India.
- The government has expanded the definition of small companies. This change allows more businesses to benefit from easier compliance rules and quicker merger processes. Companies with paid-up capital up to ₹10 crore and turnover up to ₹100 crore now qualify. These new rules aim to boost ease of doing business in India.
- Global imports worth \$2,640 billion were impacted by tariffs and trade measures between mid-October 2024 and 2025, a significant increase from the previous period. The WTO noted a rise in protectionism, with nearly a fifth of world imports now affected by such measures.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

| Company | Price | Change | %Gain | | Company | Price | Change | %Gain |
|----------------|-----------|--------|-------|--|----------------|----------|--------|-------|
| Asian Paints | 2,954.40 | 86.80 | 3.03 | | Interglobe Avi | 5,697.50 | -96.50 | -1.67 |
| Dr Reddys Labs | 1,275.20 | 15.10 | 1.20 | | Axis Bank | 1,258.00 | -17.70 | -1.39 |
| Maruti Suzuki | 16,239.00 | 142.00 | 0.88 | | Reliance | 1,546.30 | -19.80 | -1.26 |
| Bharti Airtel | 2,104.00 | 14.30 | 0.68 | | ICICI Bank | 1,373.00 | -17.10 | -1.23 |
| HUL | 2,477.80 | 13.30 | 0.54 | | HDFC Bank | 989.80 | -12.30 | -1.23 |

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

| Company | Price | Change | %Gain | | Company | Price | Change | %Gain |
|----------------|--------|--------|-------|--|--------------------|--------|--------|-------|
| Asian Paints | 2,954 | 86.8 | 3.03 | | Bajaj Housing Fin | 97 | -7.47 | -7.15 |
| Swiggy | 399 | 10.8 | 2.77 | | Indian Bank | 859.45 | -27.9 | -3.15 |
| ABB Power | 22,755 | 570 | 2.57 | | Bajaj Holdings | 11,049 | -283 | -2.50 |
| Motherson Sumi | 119 | 2.72 | 2.33 | | 360 One Wam | 1,163 | -26.4 | -2.22 |
| Vodafone Idea | 10 | 0.21 | 2.02 | | Adani Transmission | 976.95 | -22.15 | -2.22 |



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OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|------------|-----------|--------|---------|----------------------|----------------|
| POWERINDIA | 22,755.00 | 535.00 | 2.41% | 209.7 | 13.75% |
| CAMS | 3,865.80 | -67.00 | -1.70% | 1885.8 | 6.48% |
| ANGELONE | 2,753.00 | 11.10 | 0.40% | 2967.5 | 6.46% |
| SHREECEM | 26,720.00 | 145.00 | 0.55% | 283.4 | 6.35% |
| KPITTECH | 1,261.40 | -4.80 | -0.38% | 3260.4 | 5.68% |

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|------------|----------|--------|---------|----------------------|----------------|
| HINDUNILVR | 2,481.70 | 12.80 | 0.52% | 10020.6 | -17.76% |
| PAYTM | 1,369.20 | -3.60 | -0.26% | 19646 | -6.76% |
| BANKBARODA | 297.95 | 0.85 | 0.29% | 88557.3 | -5.15% |
| CYIENT | 1,183.70 | 13.30 | 1.14% | 3717.5 | -4.06% |
| BOSCHLTD | 36,805 | 210.00 | 0.57% | 212.1 | -3.83% |

INDEX HIGHEST OI

| F&O Ban list | Monthly exp | Indices | Highest CE strike | Highest PE strike | PCR OI |
|--------------|-------------|-----------|-------------------|-------------------|--------|
| SAMMAANCAP | 30/12/25 | NIFTY | 27,000 | 26,000 | 1.16 |
| | 30/12/25 | BANKNIFTY | 60,000 | 58,500 | 0.99 |



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 | 24,213.48 | 29,027.09 | -4,813.61 | 28,219.42 | 21,014.55 | 7,204.87 |
| 02-Dec-25 | 15,234.08 | 18,876.38 | -3,642.30 | 15,194.77 | 10,548.83 | 4,645.94 |
| 01-Dec-25 | 8,979.40 | 10,150.71 | -1,171.31 | 13,024.65 | 10,465.72 | 2,558.93 |

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 | 32,397.70 | 29,229.86 | 3,167.84 | 33,605.96 | 33,835.56 | -229.60 |
| 02-Dec-25 | 18,639.54 | 15,008.88 | 3,630.66 | 15,974.41 | 15,904.35 | 70.06 |
| 01-Dec-25 | 13,758.16 | 14,220.98 | -462.82 | 17,631.55 | 17,931.21 | -299.66 |



*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 (%) |
|--------------------------|-----------|------------|-------------|--------------|--------------|------------|
| Ferro Alloys | 1.51 | 6.34 | -5.3 | 16.06 | 26.29 | 2.13 |
| Refractories | 0.88 | 2.78 | 2.45 | 14.26 | 5.34 | -0.03 |
| Plywood Boards/Laminates | 0.73 | 0.84 | -4.67 | 0.76 | -4.58 | -18 |
| Cement - Products | 0.67 | 3.1 | -5.64 | -6.04 | -4.63 | -25.35 |
| Paints/Varnish | 0.61 | -1.47 | 2.85 | 3.22 | 6.56 | -0.18 |



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UPCOMING ECONOMIC EVENTS

| Wednesday, December 3, 2025 | Country | Event's | Forecast | | Previous |
|-----------------------------|---------|-------------------------------------|----------|--|----------|
| 18:45 | US | ADP Nonfarm Employment Change (Nov) | 19K | | 42K |
| 20:15 | US | S&P Global Services PMI (Nov) | 55.0 | | 55.0 |
| 20:30 | US | ISM Non-Manufacturing PMI (Nov) | 52.0 | | 52.4 |
| 20:30 | US | ISM Non-Manufacturing Prices (Nov) | | | 70.0 |
| 21:00 | US | Crude Oil Inventories | | | 2.774M |
| Thursday, December 4, 2025 | | | | | |
| 19:00 | US | Initial Jobless Claims | 220K | | 216K |
| Friday, December 5, 2025 | | | | | |
| 20:30 | US | Core PCE Price Index (MoM) (Sep) | 0.2% | | 0.2% |
| 20:30 | US | Core PCE Price Index (YoY) (Sep) | 2.9% | | 2.9% |
| | | | | | |
| | | | | | |

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