

ITI Morning Boost

June 20, 2025

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

NIFTY – 24,793.25 (Daily Chart)



- In Thursday's trading session, the Nifty remained muted, trading within a narrow range of 24,780–24,840 for most of the day, ultimately closing on a flat note.
- On the daily chart, the index formed a Doji candle, indicating indecision in the market. It failed to sustain above the 20 DEMA and closed below it, reflecting a lack of strong bullish momentum. The index continues to trade within the broader range of 24,420–25,100, and a breakout on either side will determine the next directional move.
- For Friday's session, **24,730** will act as the initial support level, while **24,860** will serve as the initial resistance.

BANK NIFTY – 55,577.45 (Daily Chart)



- In Thursday's trading session, the banking index remained under pressure throughout the day, ending with a negative close.
- On the daily chart, the index formed a small bearish candle and failed to sustain above the 20 DEMA, indicating weak momentum. It continues to trade below the key horizontal resistance level of 56,100. Additionally, the RSI is gradually trending downward, signaling persistent weakness in the index.
- For Friday's session, 55,480 will act as the initial support level, while 55,715 will serve as the initial resistance.





UNITDSPR : United Spirits, a Diageo company, announced the acquisition of NAO Spirits, makers of Greater Than and Hapusa gins at an enterprise value of Rs 130 crore. The deal includes secondary share purchases and a fresh equity subscription.

HDFCBANK : In one of the most awaited market events of the year, HDFC Bank's non-banking subsidiary is set to launch its Rs 12,500 crore IPO from June 25 to 27, comprising Rs 2,500 crore in fresh equity and a Rs 10,000 crore Offer for Sale by the bank. This is not just another IPO, it is being pegged as one of the biggest NBFC listings in recent times.

NATCOPHARM : After the conclusion of the inspection, the US Food and Drug Administration (FDA) has issued 7 observations in the Form-483, for company's pharma division in Kothur, Hyderabad. US FDA had conducted an inspection at the said division during June 9-19. The company will address the observations within the stipulated timeline.

CMP- 1460.80
IMPACT- **POSITIVE**

CMP- 1935.30
IMPACT- **POSITIVE**

CMP- 881.60
IMPACT- **NEGATIVE**



- The Centre on Thursday imposed five-year anti-dumping duties on imports of aluminium foil, Pretilachlor, and Acetonitrile from China, Taiwan, and Russia, following findings of unfair trade practices that hurt domestic industries. The anti-dumping duty on aluminium foil (5.5 to 80 microns in thickness) has been extended from an earlier six-month period to five years on imports from China.
- India climbed one spot to rank 15th among the world's top destinations for foreign direct investment (FDI) in 2024, despite a slight 1.9% year-on-year decline in inflows to \$27.6 billion, according to the World Investment Report 2025 released by UN Trade and Development (UNCTAD) on Thursday. In comparison, the country ranked 16th in 2023 with \$28.1 billion in FDI.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
TATA Cons. Prod	1,088.30	23.10	2.17		Adani Ports	1,338.00	-34.60	-2.52
Eicher Motors	5,493.50	100.50	1.86		Bajaj Finance	900.50	-18.50	-2.01
M&M	3,094.80	53.70	1.77		Adani Enterpris	2,420.60	-38.50	-1.57
Wipro	265.58	3.99	1.53		Coal India	384.25	-6.10	-1.56
Apollo Hospital	7,009.50	76.00	1.10		Tech Mahindra	1,684.00	-26.70	-1.56

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
Vishal Mega Mar	126.12	3.24	2.64		JSW Energy	480.55	-23.5	-4.66
Swiggy	374.15	8.75	2.39		Varun Beverages	448.65	-20.75	-4.42
TATA Cons. Prod	1,088.30	23.1	2.17		Adani Total Gas	622.6	-28.35	-4.36
Biocon	348.6	6.6	1.93		Rail Vikas	381.95	-16.05	-4.03
Eicher Motors	5,493.50	100.5	1.86		Indian Renew	158.75	-6.46	-3.91



OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
KPITTECH	1,389.00	-28.60	-2.02%	32,93,600	11.69%
BDL	1,889.00	-22.20	-1.16%	20,86,825	8.19%
SBICARD	941.50	-34.20	-3.51%	1,27,59,200	5.96%
HAVELLS	1,520	-14.50	-0.95%	81,64,500	3.45%
NBCC	114.39	-4.90	-4.11%	4,96,88,600	2.86%

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
BOSCHLTD	32,410.00	-15.00	-0.05%	2,12,275	-22.59%
VEDL	433.45	-8.10	-3.83%	6,07,38,400	-16.18%
UNITDSPR	1,460.80	-4.20	-0.29%	1,19,55,650	-13.92%
BANDHANBNK	178	-2.75	-1.52%	6,84,88,000	-11.20%
BIOCON	346	3.55	1.04%	3,39,45,000	-10.52%

F&O Ban list
ABFRL
BIOCON
CDSL
HUDCO
MANAPPURAM
RBLBANK
TITAGARH

INDEX HIGHEST OI

Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
26/06/25	NIFTY	26,000	24,000	0.91
26/06/25	BANKNIFTY	56,000	56,000	0.65



FII & DII TRADING ACTIVITY CASH

Date	FII Rs Crores			DII Rs Crores		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,96,981.72	2,01,025.21	-4,043.49	2,13,806.68	1,53,970.50	59,836.18
19-Jun-25	12,011.23	11,076.61	934.62	11,132.90	10,526.93	605.97
18-Jun-25	12,118.14	11,227.21	890.93	11,433.84	10,342.50	1,091.34
17-Jun-25	13,581.10	12,098.33	1,482.77	19,427.32	11,220.13	8,207.19
16-Jun-25	10,029.64	12,569.06	-2,539.42	14,147.65	8,366.69	5,780.96

FII & DII TRADING ACTIVITY STOCK F&O

Date	FII Stock Fut			FII Stock Opt		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	2,52,436.05	2,64,384.28	-11,948.23	9,17,354.47	9,49,654.04	-32,299.57
19-Jun-25	18,574.28	18,159.71	414.57	81,053.77	79,443.91	1,609.86
18-Jun-25	16,419.39	18,199.80	-1,780.41	78,477.20	79,039.50	-562.30
17-Jun-25	15,099.02	16,439.63	-1,340.61	72,847.98	76,097.84	-3,249.86
16-Jun-25	18,974.17	15,442.41	3,531.76	77,064.44	78,386.33	-1,321.89



*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 (%)
Oil Drill/Allied	4.17	-3.18	-2.46	6.08	-23.65	-25.34
Ship Building	0.62	-1.74	7.83	10.39	-21.38	21.8
Crude Oil & Natural Gas	0.33	0.12	8.6	12.13	-12.75	1.5
Real Estate Investment Trusts	0.18	-0.81	4.15	9.17	7.75	12.57
Plywood Boards/Laminates	0.15	-3.2	1.33	11.04	-14.74	-5.79



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UPCOMING ECONOMIC EVENTS

Friday, June 20, 2025	Country	Event's	Forecast		Previous
17:00	IN	FX Reserves, USD			696.66B
18:00	US	Philadelphia Fed Manufacturing Index (Jun)	-1.2		-4.0
Monday, June 23, 2025					
10:30	IN	S&P Global Manufacturing PMI (Jun)			57.6
10:30	IN	S&P Global Services PMI (Jun)			58.8
19:15	US	S&P Global Manufacturing PMI (Jun)			52.0
19:15	US	S&P Global Services PMI (Jun)			53.7
19:30	US	Existing Home Sales (May)			4.00M

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