

ITI Morning Boost

March 26, 2025

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

NIFTY – 23,668.65 (Daily Chart)



• In Tuesday's trading session, the Nifty opened on a positive note and initially continued its northward movement, but failed to sustain the momentum as the session progressed. The index gradually slipped south, giving up early gains and ended the day on a flattish note.

• On the daily chart, a red candle with a long upper wick has formed, signaling selling pressure at higher levels. This indicates that profit booking is active near the horizontal resistance zone, and the RSI in the overbought territory is now a caution signal for the bulls. The index needs to decisively break above the resistance for the uptrend to resume with strength.

• For Wednesday's trading session, 23,580 will act as an initial support level and, on the higher end, 23,745 will act as an initial resistance level.



BANK NIFTY – 51,607.95 (Daily Chart)



• In Tuesday's trading session, the Banking Index opened on a positive note but failed to maintain its bullish momentum. The index gradually moved south, erasing initial gains and closing lower, reflecting profit booking at higher levels.

• On the daily chart, a bearish candle has formed, signaling rejection near the upper end of the recent rally. The RSI is in the overbought zone, which suggests the index might be due for a cool-off or consolidation phase. This development calls for caution among bulls, especially if the index fails to reclaim higher levels quickly.

• **For Wednesday's trading session, 51,430 will act as an initial support level and on the higher end, 51,800 will act as an initial resistance level.**





NCC : The company has received two advance work orders worth Rs 10,804.6 crore from Bharat Sanchar Nigam for the design, supply, construction, installation, upgradation, operation, and maintenance of the middle-mile network of BharatNet in Uttarakhand Telecom Circle and Madhya Pradesh, DNH, and DD telecom circles.

MARUTI : The automobile company has received a draft assessment order for FY22 from the Income Tax Authority, wherein certain additions/disallowances amounting to Rs 2,966 crore with respect to the returned income (disclosed by the company in its income tax return) have been proposed.

BHEL : BHEL has extended its Technology Collaboration Agreement (TCA) with Vogt Power International Inc., USA, for heat recovery steam generators.

ABCAPITAL : The company has made an investment of Rs 40 crore in Aditya Birla Capital Digital on a rights basis. Post this investment, there is no change in the percentage shareholding of Aditya Birla Capital, and Aditya Birla Capital Digital continues to be a wholly owned subsidiary of the company.

CMP- 204.73
IMPACT- **POSITIVE**

CMP- 11868.90
IMPACT- **NEGATIVE**

CMP- 213.60
IMPACT- **POSITIVE**

CMP- 181.55
IMPACT- **NEUTRAL**



- India and the US would focus on increasing market access, reducing import duty and non-tariff barriers, and enhancing supply chain integration in the proposed bilateral trade agreement, the government told Parliament Tuesday. In a written reply to the Lok Sabha, Minister of State for Commerce and Industry Jitin Prasada said that as on date, reciprocal tariffs have not been applied by the US on India.
- India must be cautious while negotiating the proposed bilateral trade agreement with the US, as the absence of Fast Track Trade Authority in America makes any pact vulnerable to Congressional changes, economic think tank GTRI said on Tuesday. It also said that the certification process allows the US to effectively re-negotiate the trade agreement after it is signed, demanding domestic legal changes, regulatory reforms, and policy shifts that could undermine India's sovereignty.

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
UltraTechCement	11,421.20	370.00	3.35		IndusInd Bank	637.05	-32.40	-4.84
Bajaj Finserv	1,945.05	50.90	2.69		Dr Reddys Labs	1,177.90	-32.40	-2.68
Trent	5,185.05	130.35	2.58		Adani Enterpris	2,320.35	-48.35	-2.04
Infosys	1,628.45	35.70	2.24		Coal India	398.30	-7.70	-1.90
Grasim	2,569.45	56.25	2.24		Adani Ports	1,182.45	-18.35	-1.53

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain		Company	Price	Change	%Gain
Bharti Hexacom	1,441.10	51.3	3.69		Dixon Technolog	13,624.50	-983.85	-6.73
UltraTechCement	11,421.20	370	3.35		Zomato	209.81	-12.99	-5.83
Bajaj Finserv	1,945.05	50.9	2.69		IndusInd Bank	637.05	-32.4	-4.84
Trent	5,185.05	130.35	2.58		Kalyan Jeweller	469.2	-20.65	-4.22
Persistent	5,558.30	137	2.53		PBFintech	1609.85	-67.70	-4.04



OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %

Symbol	Price	Change	Change%	Open Interest	Open Int Chg %
OIL	390.75	-8.20	-2.06	35,35,675	-66.01%
HINDCOPPER	228.85	-9.50	-3.99	1,23,46,350	-64.25%
JSWENERGY	554.90	-19.50	-3.39	43,17,000	-64.02%
BAJFINANCE	9069.65	-21.95	-0.24	21,36,875	-54.82%
COLPAL	2373.05	-53.30	-2.20	13,58,175	-54.67%

INDEX HIGHEST OI

F&O Ban list	Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
INDUSINDBK	27/03/25	NIFTY	25,000	23,000	1.05
-	27/03/25	BANKNIFTY	53,000	49,000	1.03
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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	2,38,847.11	2,45,831.91	-6,984.80	2,05,601.34	1,77,483.48	28,117.86
25-Mar-25	19,066.28	13,694.71	5,371.57	11,692.98	14,461.85	-2,768.87
24-Mar-25	15,777.73	12,721.97	3,055.76	12,879.29	12,780.75	98.54
21-Mar-25	49,892.65	42,422.29	7,470.36	18,878.93	22,081.19	-3,202.26
20-Mar-25	16,328.06	13,088.92	3,239.14	11,784.06	14,920.08	-3,136.02

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	5,42,798.04	5,24,424.01	18,374.03	10,96,287.29	11,05,946.32	-9,659.03
25-Mar-25	1,26,721.93	1,24,878.71	1,843.22	1,03,666.46	1,04,578.08	-911.62
24-Mar-25	1,29,092.78	1,28,150.81	941.97	1,05,564.63	1,03,733.55	1,831.08
21-Mar-25	42,578.84	41,391.03	1,187.81	1,18,780.76	1,19,485.86	-705.10
20-Mar-25	25,941.65	22,688.63	3,253.02	97,445.64	99,502.34	-2,056.70



*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 (%)
Power Infrastructure	2.37	0.51	0.89	0	4.43	4.12
Real Estate Investment Trusts	0.18	-0.4	-0.53	-1.25	-3.45	4.73
Credit Rating Agencies	-0.03	1.18	-2.47	-15.93	-6.54	-3.23
Cement	-0.26	3.52	1.24	-11.35	-14.3	-4.57
Tyres	-0.66	3.91	0.98	-20.09	-24.5	-16.37



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UPCOMING ECONOMIC EVENTS

Tuesday, March 25, 2025	Country	Event's	Forecast		Previous
19:30	US	CB Consumer Confidence (Mar)	94.2		98.3
19:30	US	New Home Sales (Feb)	682K		657K
Wednesday, March 26, 2025					
12:30	GB	CPI (YoY) (Feb)	2.9%		3.0%
15:30	GB	Spring Forecast Statement			
19:00	US	Crude Oil Inventories			1.745M
Thursday, March 27, 2025					
18:00	US	GDP (QoQ) (Q4)	2.3%		2.3%
18:00	US	Initial Jobless Claims	225K		223K
Friday, March 28, 2025					
12:30	GB	GDP (YoY) (Q4)	1.4%		1.4%

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