

04.06.2025

## DAILY MARKET WRAP UP

# SENSEX

### INTRADAY CHART

TODAY SENSEX OPENED WITH AN UPSIDE GAP OF 40.14 POINTS AND DURING THE DAY IT GATHERED MOMENMTUM AND CLOSED UP BY 260.74 POINTS OR 0.32%.

#### BSE SENSEX

**80,998.25** +260.74 +0.32%

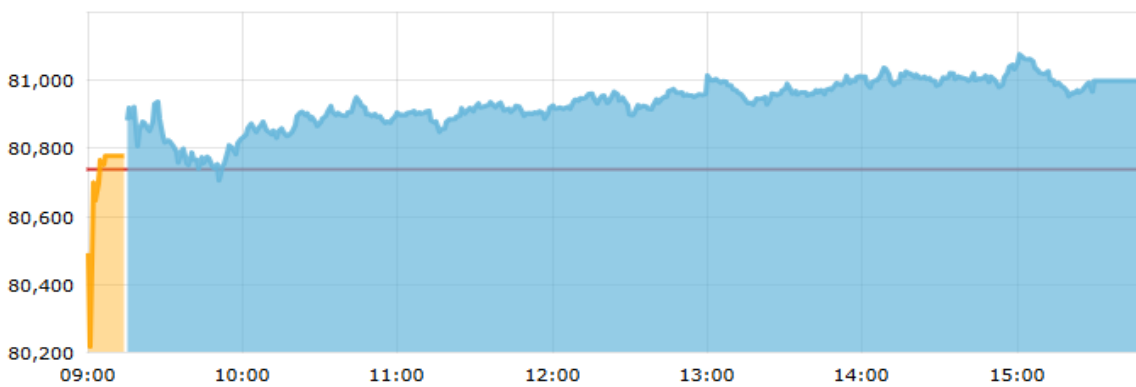
04 Jun 25

Previous Close :80,737.51

Open :80,777.65

High :81,087.29

Low :80,705.18



### WEEKLY TECHNICALS:



## SUPPORT

S1: 82100 (SHORT TERM) BROKEN

S2: 78540 (MID TERM)

S3: 75075 (LONG TERM)

S4: 72012 INTACT

## RESISTANCE

R1: 75010 (BROKEN UPWARDS)

R2: 78540 (BROKEN UPWARDS)

R3: 82100 (TESTED)

## TODAY'S GAINERS

**ETERNAL:** THE SHARE WAS UP TODAY AS MORGAN STANLEY HAS REITERATED ITS BULLISH STANCE FOR THE SHARE.

TODAY'S OTHER GAINERS WERE, BHARTI AIRTEL, INDUSIND AND TECHM.

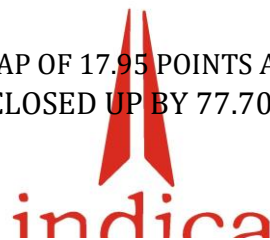
## TODAY'S LOSERS

THE LOSERS WERE BAJAJ FINSERV, AXIS BANK, TCS AND TITAN.

# NIFTY 50

## INTRADAY CHART

TODAY NIFTY OPENED WITH AN UPSIDE GAP OF 17.95 POINTS AND DURING THE DAY IT TOO FOLLOWED THE SAME TREND AS OF SENSEX AND CLOSED UP BY 77.70 POINTS OR 0.32% SETTLED AT 24620.20..



### NIFTY 50 >

**24,620.20**

77.70 (0.32%)

● Open

24,560.45

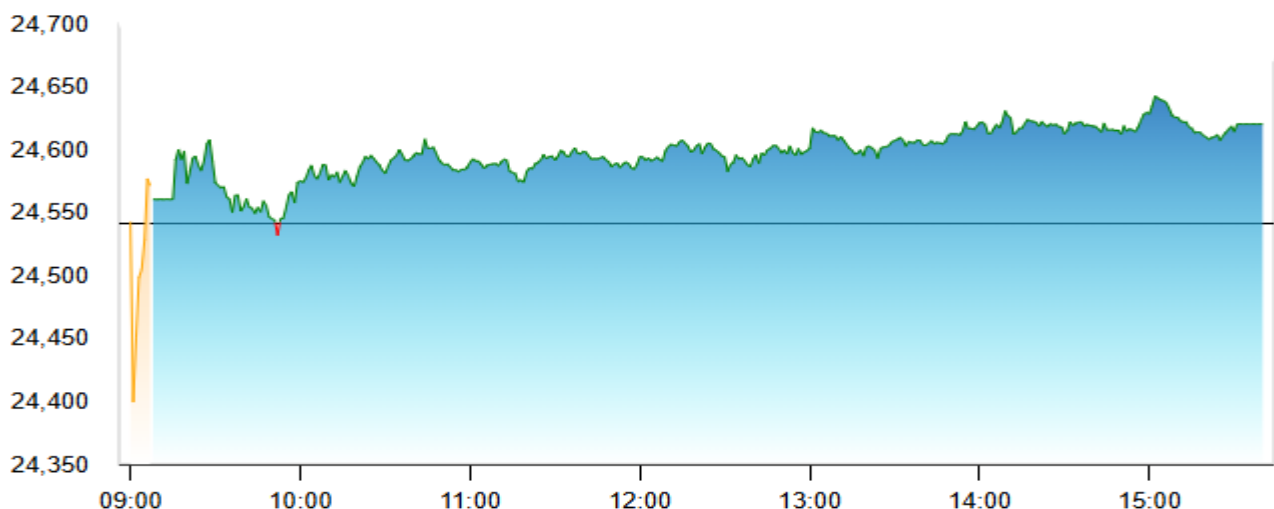
● High

24,644.25

● Low

24,530.45

Updated: 04-Jun-2025



## WEEKLY TECHNICALS:



### SUPPORT

S1: 24340 (SHORT TERM) BROKEN  
S2: 23940 (MID TERM)  
S3: 22790 (LONG TERM)  
S4: 21883 INTACT

### RESISTANCE

R1: 22790 (BROKEN UPWARDS)  
R2: 23940 (BROKEN UPWARDS)  
R3: 24340 (BROKEN UPWARDS)



*TODAY'S GAINERS WERE ETRNAL, JIOFIN, INDUSIND AND TATA MOTORS.*

### **TODAY'S LOSERS**

*TODAY'S LOSERS WERE KOTAK BANK, COAL INDIA, WIPRO AND INFOSYS.*

## MIDCAP INDEX

### INTRADAY CHART

THE MID CAP INDEX OPENED WITH AN UPSIDE GAP OF 117.02 POINTS BUT DURING THE START OF THE DAY IT DRIFTED TO LOWER LEVELS OF 45034.95 BUT LATER IT GATHERED MOMENTUM AND CLOSED UP BY 342.88 POINTS OR 0.76% AND SETTLED AT 45502.84.

## BSE MidCap

45,502.84 +342.88 +0.76%

04 Jun 2025

Previous Close :45,159.96

Open :45,276.98

High :45,520.45

Low :45,034.95



## WEEKLY TECHNICALS:



## SUPPORT

S1: 45270(SHORT TERM) BROKEN

S2: 44105 (MID TERM) BROKEN

S3: 39450 (LONG TERM)

S4: 38050 INTACT

## RESISTANCE

R1: 39450(BROKEN UPWARDS)

R2: 44105(BROKEN UPWARDS)

R3: 45270(TESTED)

R4: 48160

## TODAY'S GAINERS,

TODAY'S GAINERS WERE RVNL, GLAXO, IKS AND POLICY BAZAR.

## TODAY'S LOSERS

**ABFRL:** THE SHARE WAS DOWN TODAY AS COMPANY'S 6.23 % EQUITY HAS BEEN TRADED VIA BLOCK DEAL AT AN AVERAGE PRICE OF RS. 81 PER SHARE.

THE OTHER LOSERS WERE FIRSTCRY, ALKEM AND PREMIER ENERGIES.

## SMALL CAP INDEX

### INTRADAY CHART

THE SMALL CAP INDEX OPENED WITH AN UPSIDE GAP OF 181.47 POINTS AND DURING THE DAY IT TOO FOLLOWED THE SAME TREND AS OF MID CAP INDEX AND CLOSED UP BY 305.41 POINTS OR 0.58% SETTLED AT 52868.85.



#### BSE SmallCap

**52,868.85** +305.41 +0.58%

04 Jun 2025 |

Previous Close :52,563.44

Open :52,744.91

High :52,912.03

Low :52,419.86



### WEEKLY TECHNICALS:



### SUPPORT

S1: 53365(SHORT TERM) BROKEN  
 S2: 51920 (MID TERM) BROKEN  
 S3: 45945 (LONG TERM) (BROKEN)  
 S4: 43750

### RESISTANCE

R1: 45945 (BROKEN UPWARDS)  
 R2: 51920 (BROKEN UPWARDS)  
 R3: 53365  
 R4: 55495



THE GAINERS WERE QUICK HEAL, IRCON, MVGJL AND REL INFRA.

### TODAY'S LOSERS

**SPARC:** THE SHARE WAS DOWN TODAY AS COMPANY HALTED ITS DEVELOPMENT OF PSORISASIS DRUG.

THE OTHER LOSERS WERE INDOSTAR, SUNCLAY AND AVANTI FEEDS.

### FII AND DII MIXED POSITION

03.06.2025:

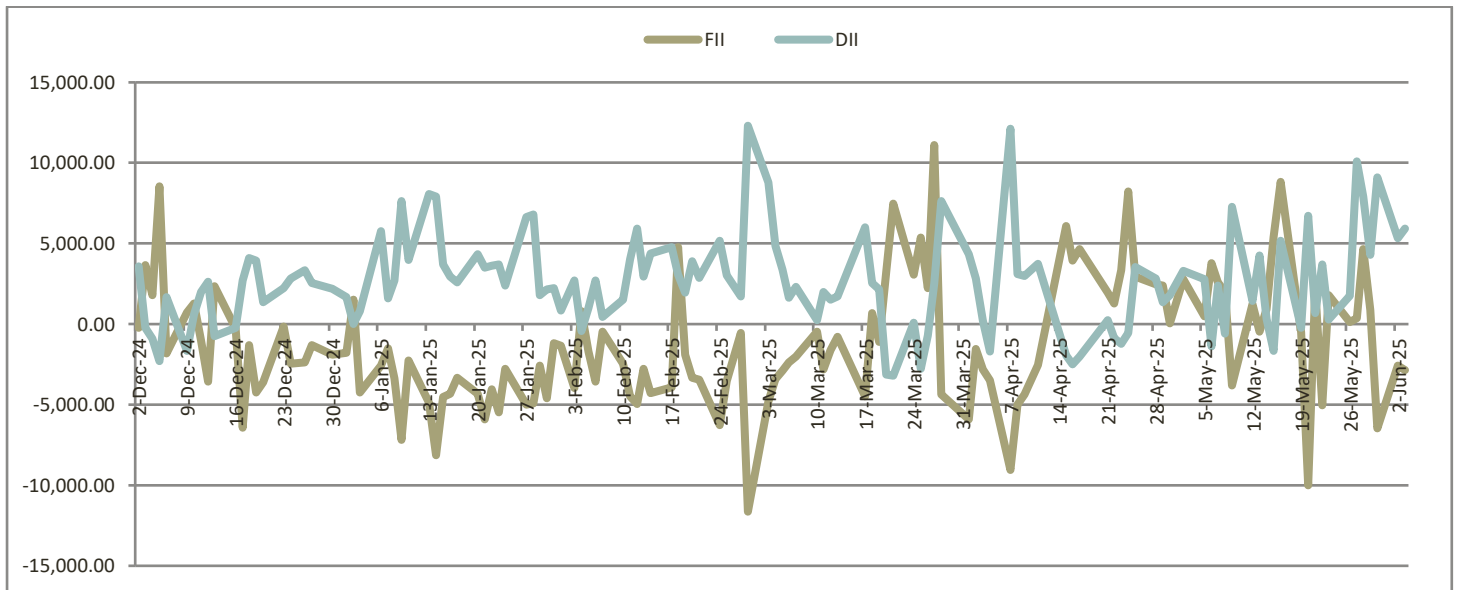
FII CASH MARKETS: 2853.83

SOLD 2853.83 CR IN NET POSITION

DII CASH MARKETS: 5907.97

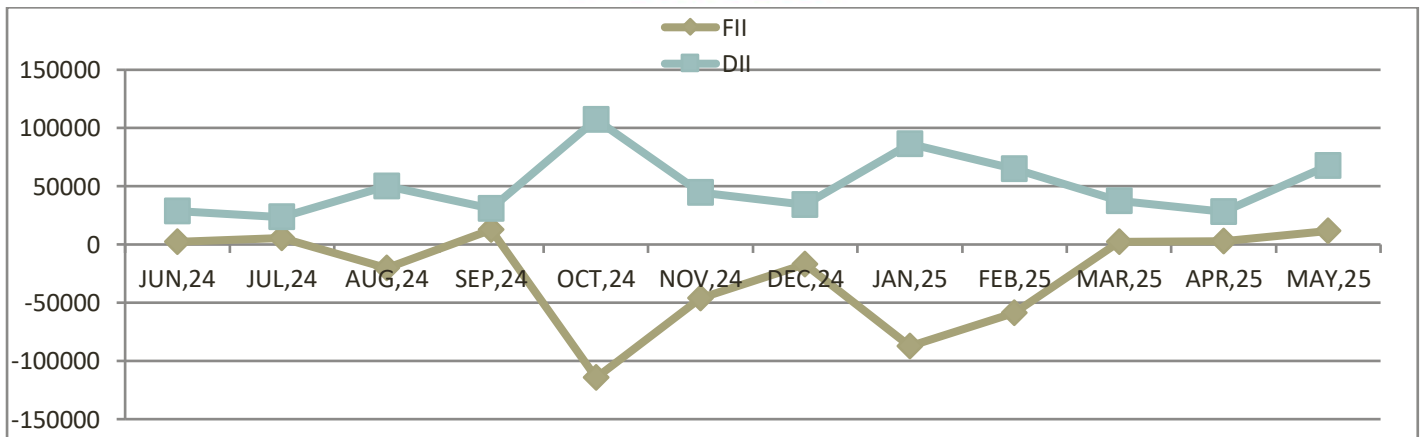
BOUGHT 5907.97 CR IN NET POSITION

DAILY POSITION FROM 02.12.2024 TO 03.06.2025



DURING THIS PERIOD FII SELLING WHICH VISIBLY SUBSIDED RECENTLY STARTED FRESH BUYING WHEREAS DOMESTIC WHICH RESORTED TO INTERMITTENT BUYING AND SELLING TOO JUMPED INTO THR FRAY RELEASING PRESSURE ON THE MARKETS WITH UPWARD MOMENTUM.

#### MONTHLY POSITION



**ON MONTHLY BASIS FII SELLING IS TRYING TO BE COUNTER BALANCED BY DII BUYING. FIIS AFTER SEVEN CONSECUTIVE MONTHS SINCE SEP 2024 THEY TURNED NET BUYERS DURING THE MONTH OF APR 2025.AND FOR THE MONTH OF MAY BOTH FIIS AND DIIS TURNED NET BUYERS GIVING A FILIP TO THE UPSIDE OF THE MARKETS.**

#### VALUATIONS

INDEX	EPS 1 YEAR TTM	PRICE	P/E 1 YEAR TTM
SENSEX	3564.6	80998.25	22.7
NIFTY 50	1108.5	24620.20	22.1
BSE MID CAP	1227.8	45502.84	36.8
BSE SMALL CAP	1604	52868.85	32.8

SOURCE:TRENDLYNE.COM

## GLOBAL INDICIES

GLOBAL INDICES ARE STRONG

US MARKETS AS ON 03.06.2025

	PRICE	CHANGE
DOW	42519.64	+214.16
NASDAQ	19398.96	+156.34

EUROPEAN MARKETS 04.06.2025 AT 03:30 PM

FTSE 100	8796.56	+9.54
DAX	24298.14	+167.26
CAC 40	7813.83	+49.99

ASIAN MARKETS 04.06.2025 AT CLOSE

NIKKEI 225	37747.45	+300.64
HANG SENG	23654.03	+141.54
KOSPI	2770.84	+71.87
TAIWAN SE	21618.09	+491.16
SHANGHAI COMPOSITE	3376.20	+14.23



## DOW FUTURES

### INTRA DAY CHART

THE FUTURES OPENED LOWER BUT NOW TRADING HIGHER.

#### E-mini Dow (\$5) Continuous Contract

**\$42,658.00**

↑ 0.14%

+60.00 Today

Jun 4, 10:15:00 AM UTC · USD · CBOT · Disclaimer

1D

5D

1M

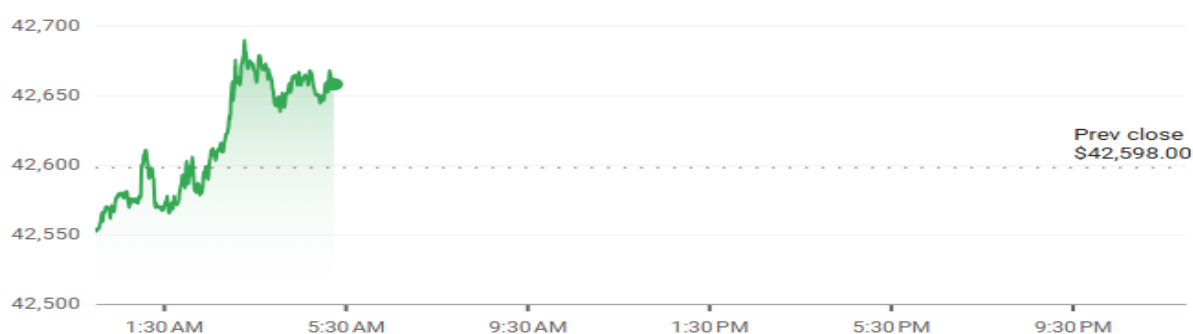
6M

YTD

1Y

5Y

MAX



### INTRA DAY CHART

GOLD OPENED HIGHER AND STILL TRADING HIGHER.

#### Gold Continuous Contract

**\$3,383.90**

↑ 0.20%

+6.80 Today

Jun 4, 10:15:47 AM UTC · USD · COMEX · Disclaimer

1D

5D

1M

6M

YTD

1Y

5Y

MAX



### WEEKLY TECHNICALS:



THE CHART SHOWS GOLD PRICES ARE IN A RISING TRAJECTORY AFTER BREAKING OUT OF THE CONSOLIDATION ZONE DUE TO UNCERTAINTIES CREATED BY WORLDWIDE TRADE TARIFF WARS AND BUYING BY CENTRAL BANKS.

DURING THE LAST FOUR MONTHS THE BUYING BY CENTRAL BANKS ACROSS THE GLOBE REACHED 1000 TONNES ANUALLY WHICH EARLIER USED TO BE ONLY 400 TO 500 TONNES ANNUALLY.

HOWEVER CHINA CENTRAL BANK BOUGHT ONLY 16-18 TONNES IN THE PAST FEW MONTHS. WHICH EARLIER HAS BEEN BUYING 200 TO 500 TONNES ANUALLY IT REMAINS TO BE SEEN WHETHER IT CAN SUSTAIN HEAVY BUYING GIVEN ITS CURRENT ECONOMIC TRAVAILS. (AS REPORTED IN BUSINESS STANDARD DATED 24.03.2025)

## SUPPORT

S1: 3000  
S2: 2800  
S3: 2650

R1: 3215  
R2: 3400

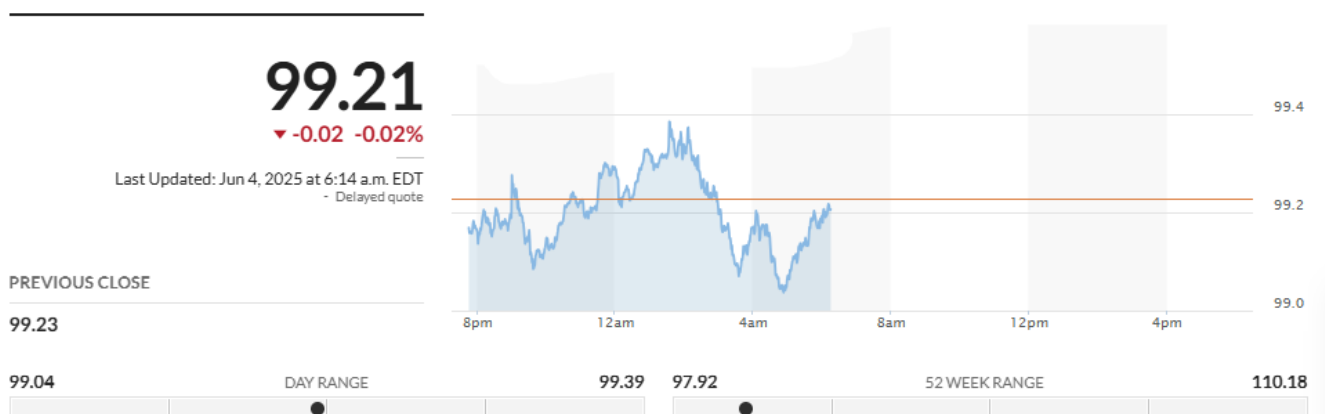


## DOLLAR INDEX

### INTRA DAY CHART

DOLLAR INDEX OPENED LOWER BUT AFTER A BRIEF RECOVERY IT IS AGAIN TRADING LOWER.

### U.S. Dollar Index (DXY)



## WEEKLY TECHNICALS:



THE DOLLAR INDEX IS HAS WEAKENED AS THE DEMAND FOR DOLLAR IS NOW DIMNISHING WHICH EARLIER HAS BEEN CONTINUOUSLY SURGING FOR IMPORT AND TRADE PURPOSES.

SECONDLY DUE TO BUYING BY FIIS RECENTLY.

THIRDLY THERE HAVE BEEN CONSISTENT DOLLAR SALES FROM FOREIGN BANKS.

FOURTHLY FROM STRONG CORPORATE REPATRIATION AHEAD OF THE FINANCIAL YEAR ENDS. (AS REPORTED IN BUSINESS STANDARD DATED 25.03.2025).

### SUPPORT

S1: 99.30 LONG TERM

### RESISTANCE

R1: 104.85

R2: 109.50

## CRUDE OIL

CRUDE OIL INDEX OPENED LOWER BUT AFTER A VOLATILE SESSION IT IS NOW TRADING HIGHER.

### INTRA DAY CHART

#### Crude Oil Continuous Contract

**\$63.57**

↑ 0.25%

+0.16 Today

Jun 4, 10:16:33 AM UTC · USD · NYMEX · Disclaimer

1D

5D

1M

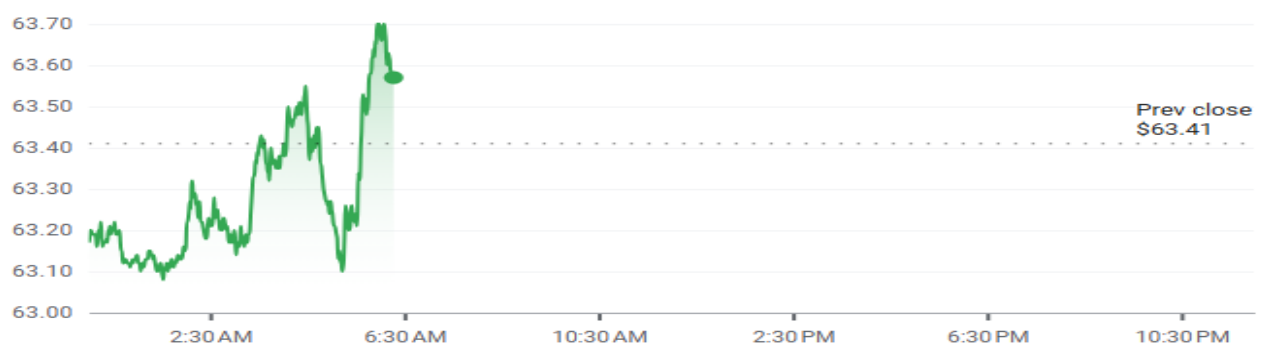
6M

YTD

1Y

5Y

MAX



## WEEKLY TECHNICALS:



OPEC+ WILL DECIDE ON COMING SATURDAY ALTHOUGH EASING TRADE CONCERNS WERE SUPPORTIVE.

US PRESIDENT DONALD TRUMP'S DECISION TO EXTEND TRADE TALKS WITH EUROPEAN UNION UNTIL JULY 9 ALLEVIATED IMMEDIATE FEARS OF TARRIFS THAT COULD SUPPRESS FUEL DEMAND. UNCERTAINTY OVER WHETHER A DEAL CAN BE REACHED BETWEEN IRAN AND THE UNITED STATES ADDED TO A MORE BULLISH MOOD. (SOURCE ECONOMIC TIMES DATED 28.05.2025)

### **SUPPORT**

S1: 66 LONG TERM BROKEN

### **RESISTANCE**

R1: 85.30

R2: 93.58

## **EQUITY MARKET TRIGGERS**

### **POSITIVE TRIGGERS**

### **RESERVE BANK OF INDIA:**

- 1) RATE CUT IN CRR BY 0.5 %
- 2) RATE CUT IN REPO RATE BY 25 BASIS POINT
- 3) 25 BASIS POINTS REDUCTION IN REPO RATE ON APRIL 9 2025
- 4) FURTHER RATE CUTS BY 25 BASIS POINTS EXPECTED IN JUNE 2025 MPC
- 5) NEUTRAL MONETARY POLICY STANCE BY RBI HAS NOW CHANGED TO ACCOMODATIVE.
- 6) THE POLICY RATES MAY BE CUT BY 75-100 BASIS POINTS IN THE CURRENT YEAR LEADING TO 5.5 % RERO RATE IN FY26

## FEDERAL RESERVE:

- 1) FED'S POSITIVE STANCE ON FUTURE RATE CUTS.

## POLITICAL HIGHLIGHTS:

- 1 LANDSLIDE VICTORY BY BJP IN DELHI ELECTIONS
- 2 GEO POLITICAL RISKS OF RUSSIAN UKRAIN WAR, ISREAL PALESTIAN WAR ARE ABATING

## ECONOMIC HIGHLIGHTS:

1. UPSHOOTS IN RURAL DEMAND DUE TO KHARIF OUTPUT ON ACCOUNT OF GOOD RAINS AND SECONDLY INCREASE IN MSP. INFLATION RATE EASINESS IN FUTURE ON ACCOUNT OF GOOD RABI CROP AND ADEQUATE RESERVOIRS.
2. RETAIL INFLATION AT 3.16% FOR APRIL 25 VS 3.34% IN MAR 25 WHICH IS BELOW 4% TARGET RBI RATE.
3. VALUATION CONCERNS IS NOW GIVING WAY TO FAIRLY VALUED MARKETS
4. THE INFLATION RATE IS EXPECTED TO BE 4.4 % IN FY26 FROM 4.7% EARLIER WHICH INDICATES COOLING DOWN IN INFLATION.
5. GOVT EXP IS SUPPOSED TO BE INCREASED IN SECOND HALF OF 24-25
6. SLOWDOWN IN URBAN DEMAND DUE TO SLOW WAGE INCREASE AND INFLATIONARY PRESSURES NOW ABATING AND RATHER GREEN SHOOT IN URBAN DEMAND ON ACCOUNT OF LOWER INPUT COSTS ARE VISIBLE
7. IMD PREDICTED ABOVE NORMAL MONSOON IN 2025 WHICH 105% OF LONG PERIOD AVERAGE (LPA) SECOND YEAR IN A ROW KEEPING FOOD INFLATION UNDER CONTROL. **(DATED 15.04.2025)**

## INVESTMENTS

## INTERNATIONAL HIGHLIGHTS:

- 1) US HAS GIVEN A PAUSE IN TARRIFS WITH A BASELINE OF 10% FOR 90 DAYS IS A BIG RELIEF
- 2) MORE THAN 75 COUNTRIES HAVE REACHED OUT TO US TO DISCUSS NEW TRADE DEALS.
- 3) US COMPANIES LOOKING TO RELOCATE THEIR MANUFACTURING FROM CHINA TO INDIA AS GLOBAL SUPPLY CHAINS REALIGNMENT ACROSS ELECTRONICS, TOYS AND PHARMACEUTICALS.
- 4) THE FIRST UK – US TRADE DEAL CONCLUDED POSITIVE AS THE DEAL CUTS DUTY TO 10 % FOR UK CARS.
- 5) THE US HAD AGREED TO PARE BACK TARRIFS ON CHINESE IMPORTS FROM A COMBINED 145 % TO 30 % IN RETURN CHINA WILL REDUCE TARRIFS ON US GOODS TO 10 % FROM 125% FOR 90 DAYS.**(DATED 12.05.2025)**
- 6) INDIAN EXPORTERS WILL FACE A 10% BASELINE FOLLOWING THE SUSPENSION OF COUNTRY SPECIFIC RECIPROCAL TARRIFS THROUGH JULY 8.

## NEGATIVE TRIGGERS

## INTERNATIONAL HIGHLIGHTS:

- 1) WTO SHARPLY DOWNGRADING ITS FORECAST FOR GLOBAL MERCHANDISE TRADE VOLUME IN 2025 TO 0.2 % CONTRACTION FROM ITS EARLIER GUIDANCE OF 2.75% GROWTH AFTER FACTORING IN THE 10% BASE LINE TARRIFS IMPOSED BY THE US.
- 2) CHINA'S GDP GROWTH IS EXPECTED TO SLOW TO 3.8% IN 2025 FROM 4.5 % FORECASTED EARLIER BY MOODY'S RATINGS, WHILE US ECONOMIC GROWTH IS ANTICIPATED TO SLOW TO 1 % COMPARED TO 2 % PROJECTED IN THE FEBRUARY OUTLOOK. THE RATINGS AGENCY HAS CUT THE GLOBAL GROWTH FORECAST TO 1.9 % FOR 2025 FROM ITS PREVIOUS PROJECTION OF 2.5 %.(SOURCE: ECONOMIC TIMES DATED 07.05.2025)

### **DOMESTIC HIGHLIGHTS:**

- 1) RBI HAD DECREASED THE REAL GDP GROWTH TARGET FROM 6.70 TO 6.50.

### **LONG TERM TRIGGERS**

- 1) INDIA'S SHARE IN GLOBAL FUNDS WILL RISE SHARPLY
- 2) INFLOW OF 1.5 TRILLION DOLLAR ON A 5 TRILLION DOLLAR MARKET CAPTILISATION IS EXPECTED
- 3) DOMESTIC EQUITY EXPOSURE COULD TREBLE FROM 5 % TO 15 % IN 10 TO 15 YEARS



THE OUTPERFORMING SECTORS INCLUDE TELECOM, CHEMICALS, PVT BANKING, PSU BANKS, DEFENCE AND FINANCIAL SERVICES.

### **UNDEPERFORMING SECTORS**

THE UNDER PERFORMING SECTORS INCLUDE PHARMA AND HEALTHCARE, CPSE, ENERGY, FMCG, AUTO, AUTOANCILLARY, REAL ESTATE AND METALS.

### **OUTLOOK**

**SECTOR OVERWEIGHTS:** PHARMA, HEALTHCARE, CHEMICALS, TELECOM, FINANCIAL SERVICES, PVT BANKING, DISCRETIONARY CONSUMPTION AND TEXTILES

**SECTOR UNDERWEIGHTS:** CAPEX, INDUSTRIALS, AND METALS

**SECTOR NEUTRAL/EQUAL WEIGHTS:** AUTO, AUTO ANC, IT AND CEMENT

### **LEGAL DISCLAIMER:**

THE SOURCES OF THE ABOVE MENTIONED INFORMATION ARE CNBC TV18, MONEYCONTROL.COM, ECONOMIC TIMES, BUSINESS STANDARD AND MINT ETC.

THIS IS TO INFORM YOU THAT THE ABOVE MENTIONED INFORMATION IS ONLY FOR EDUCATIONAL PURPOSE AND NOT INTENDED FOR ANY ADVICE AND NEITHER THERE IS ANY GUIDANCE.

PERSONS/TRADERS/INVESTORS WHO ARE ACTING ON THIS PIECE OF INFORMATION ARE REQUIRED TO CONSULT THEIR FINANCIAL OR INVESTMENT ADVISORS BEFORE ACTING.

WE ARE NOT LIABLE FOR ANY LOSS OR GAINS INCURRED OR ACCURED ON THE BASIS OF THE ABOVE INFORMATION.

INVESTMENTS IN SECURITIES MARKET ARE SUBJECT TO MARKET RISKS, READ ALL THE RELATED DOCUMENTS CAREFULLY BEFORE INVESTING.

