28.05.2025

DAILY MARKET WRAP UP



INTRADAY CHART

TODAY SENSEX OPENED WITH A DOWNSIDE GAP OF 94.02 POINTS AND DURING THE WHOLE VOLATILE MARKET SESSION IT TRIED TO MADE A RECOVERY BUT DIDN'T MANAGE AND CLOSED DOWN BY 203.74 POINTS OR 0.25% SETTLED AT 81347.89.

BSE SENSEX

81,347.89 -203.74 -0.25 %

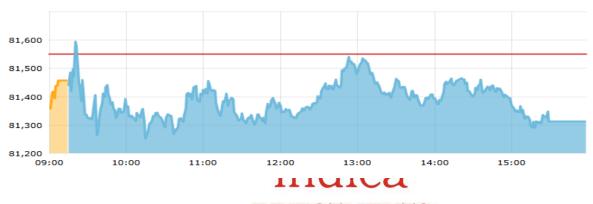
28 May 25

Previous Close: 81,551.63

Open: 81,457.61

High: 81,613.36

Low:81,244.02



INVESTMENTS

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

TODAY'S GAINERS WERE BAJAJ FINANCE, BHARTI AIRTEL, ICICI BANK AND ADANI PORTS.

TODAY'S LOSERS

ITC: THE SHARE WAS DOWN TODAY AS THE BRISTISH AMERICAN TOBACCO OFFLOADED ITS 2.3 % STAKE AT A FLOOR PRICE OF RS. 420 PER SHARE.

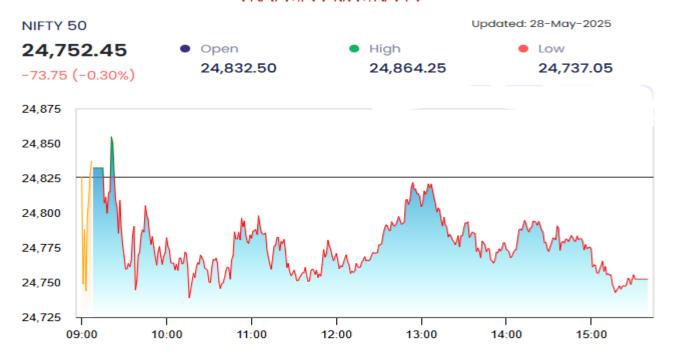
THE OTHER LOSERS WERE INDUSIND BANK, NESTLE IND AND ULTRATECH.



INTRADAY CHART

TODAY NIFTY OPENED WITH A FLAT DOWNSIDE GAP OF 6.3 POINTS AND DURING THE DAY IT TOO FOLLOWED THE SAME TREND AS OF SENSEX AND CLOSED DOWN BY 73.75 POINTS OR 0.30% SETTLED AT 24752.45.

INVESTMENTS





SUPPORT

S1: 24340 (SHORT TERM) BROKEN

S2: 23940 (MID TERM) S3: 22790 (LONG TERM)

S4: 21883 INTACT



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

indica TODAY'S GAINERS NTS

TODAY'S GAINERS WERE HDFC LIFE, BEL, BAJAJ FINANCE AND HERO MOTOCORP.

TODAY'S LOSERS

TODAY'S LOSERS WERE INDUSIND BANK, APOLLO HOSPITALS, ULTRA TECH AND HINDALCO.



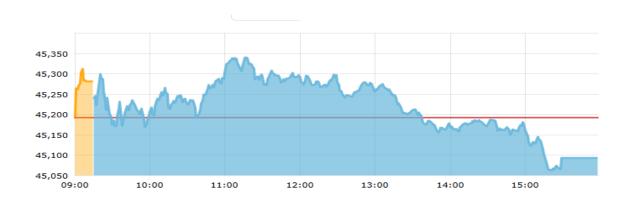
INTRADAY CHART

THE MID CAP INDEX OPENED WITH AN UPSIDE GAP OF 89.74 POINTS AND DURING THE DAY AFTER MAINTAINING THE UP TREND IT DRIFTED TO LOWER LEVELS IN THE LAST MARKET HOURS AND CLOSED DOWN BYB 98.28 POINTS OR 0.22% SETTLED AT 45093.52.

BSE MidCap

45,093.52 -98.28 -0.22%

28 May 25





WEEKLY TECHNICALS:



<u>SUPPORT</u> <u>RESISTANCE</u>

S1: 45270(SHORT TERM) BROKEN R1: 39450(BROKEN UPWARDS)

S2: 44105 (MID TERM) BROKEN R2: 44105 (BROKEN UPWARDS)

S3: 39450 (LONG TERM) R3: 45270(TESTED)

S4: 38050 INTACT R4: 48160

TODAY'S GAINERS

TODAY'S GAINERS WERE GLAXO, IGL, BHARTI HEXACOM AND PI INDUSTRIES.

TODAY'S LOSERS

THE LOSERS WERE ESCORTS, FLUOROCHEM,

SMALL CAP INDEX

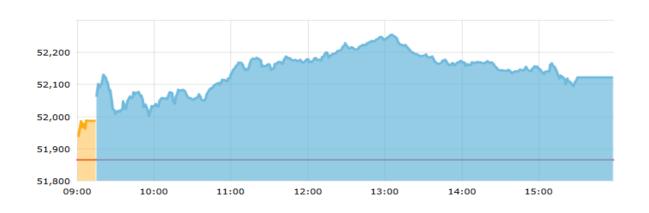
INTRADAY CHART

THE SMALL CAP INDEX OPENED FLAT WITH AN UPSIDE GAP OF 121.67 POINTS AND DURING THE DAY IT MAINTAINED THE MOMENTUM AND CLOSED UP BY 257.35 POINTS OR 0.50% SETTLED AT 52122.64.

BSE SmallCap

52,122.64 +257.35 +0.50%

28 May 25





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 (TESTED)

R3: 53365

R4. 55495

INVESTMENTS

TODAY'S GAINERS.

APOLLO MICRO SYSTEMS: THE SHARE WAS UP TODAY AS THE COMPANY HAD RECEIVED AN EXPORT ORDER OF WORTH RS 114 CR

THE OTHER GAINERS WERE RELTD, TECHNO ENGG AND IFCI

TODAY'S LOSERS

THE OTHER LOSERS WERE RACLGEAR, OAL, TARSONS AND TGVSL.

FII AND DII BUYING POSITION

27.05.2025:

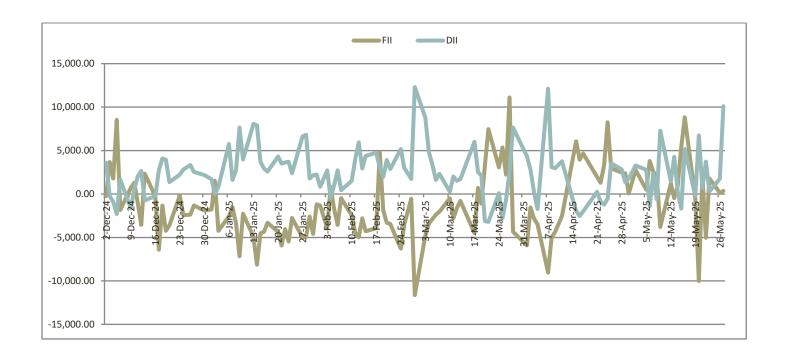
FII CASH MARKETS: 348.45

BOUGHT 348.45 CR IN NET POSITION

DII CASH MARKETS: 10104.66

BOUGHT 10104.66 CR IN NET POSITION

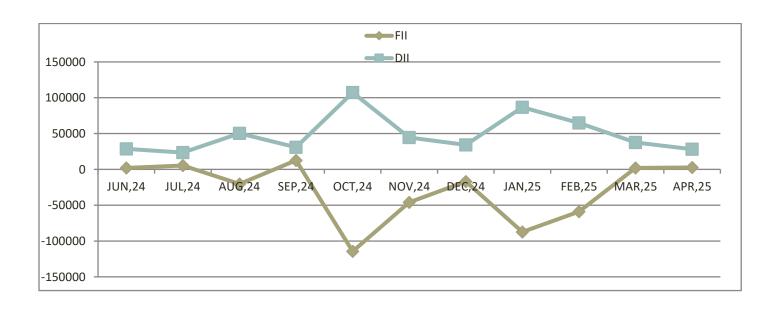
DAILY POSITION FROM 02.12.2024 TO 27.05.2025



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.

INVESTMENTS

MONTHLY POSITION



ON MONTHLY BASIS FII SELLING IS TRYING TO BE COUNTER BALANCED BY DII BUYING. FIIS AFTER SEVEN CONSECTIVE MONTHS SINCE SEP 2024 THEY TURNED NET BUYERS DURING THE MONTH OF APR 2025.

VALUATIONS

INDEX	EPS 1 YEAR TTM	PRICE	P/E 1 YEAR TTM
SENSEX	3586.3	81312.32	22.7
NIFTY 50	1112.8	24752.45	22.3
BSE MID CAP	1239.8	45093.52	36.5
BSE SMALL CAP	1608.7	52122.64	32.2

SOURCE:TRENDLYNE.COM



US MARKETS ANONE 25 05 2025 \TS

PRICE

DOW	42343.65	+740.58
NASDAQ	19199.16	+461.96

EUROPEAN MARKETS 28.05.2025 AT 03:30 PM

CHANGE

FTSE 100	8767.61	-10.44	
DAX	24176.32	-50.17	
CAC 40	7826.27	-0.52	

ASIAN MARKETS 28.05.2025 AT CLOSE

NIKKEI 225	37722.40	1 71
NIKKEI 225	37722.40	-1.71
HANG SENG	23258.31	-123.68
KOSPI	2670.15	+32.93
TAIWAN SE	21357.72	+21.18
SHANGHAI COMPOSITE	3339.93	-0.76

DOW FUTURES

INTRA DAY CHART

THE FUTURES OPENED LOWER AND IN RECOVERY MODE BUT STILL TRADING LOWER.

E-mini Dow (\$5) Continuous Contract



INTRA DAY CHART

GOLD OPENED LOWER BUT NOW TRADING HIGHER.

Gold Continuous Contract





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 R1: 3215

S2: 2800 R2: 3400

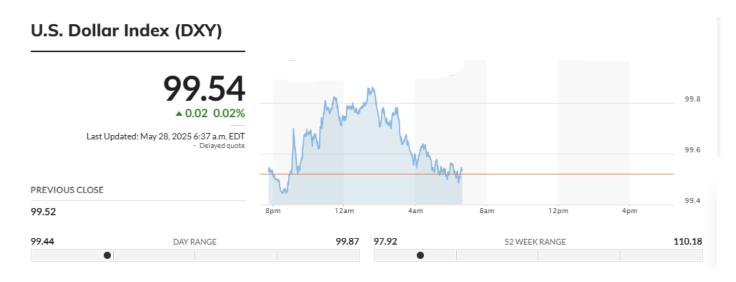
S3: 2650

indica INVESTMENTS

DOLLAR INDEX

INTRA DAY CHART

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





THE DOLLAR INDEX IS HAS WEAKENED AS THE DEMAND FOR DOLLAR IS NOW DIMNISHING WHICH EARLIER HAS BEEN CONTINUUSLY 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

INTRA DAY CHART

FITTOTCA
INVESTMENTS

R2: 109.50

CRUDE OIL

CRUDE OIL INDEX OPENED HIGHER AND STILL TRADING HIGHER.

Crude Oil





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 TARRES THAT COULD SUPPRESS FUEL DEMAND. UNCERTAINITY 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 RESISTANCE

S1: 66 LONG TERM BROKEN 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 REPORATE 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 RERSERVE:

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 RESERVIOURS.
- 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 COOOLING 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 SHOOTS 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)

INTERNATIONAL HIGHLIGHTS:

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- 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 FORCAST 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

MAJOR RESULTS TO BE DECLARED TODAY

BIRLASOFT, BATA INDIA, CUMMINS AND IRCTC.

SECTORAL INDICES

OUTPERFORMINGSECTORS

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

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

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