



WEEKLY WRAP-UP

03RD MARCH - 07TH MARCH 2025

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03 Mar 2025-07 Mar 2025

- Glenmark recalls 15 lakh bottles of ADHD medication in the US: USFDA
- NTPC Group achieves fastest 400 BU power generation in FY25
- Radico Khaitan expects Rs500cr sales from luxury brands in FY26: MD
- NLC India secures 200MW Wind Power Project from SJVN
- AstraZeneca Pharma India gets CDSCO approval to import, sell cancer treatment medicine
- Steel demand will continue to grow despite global geo-political situation: Tata Sons
- Piramal to sell its stakes in Shriram insurance firms
- London court directs ex-Aircel promoter Sivasankaran to pay IDBI Bank Rs1,250cr
- Jio Financial Services to acquire 7.9 crore shares of Jio Payments Bank
- Suzlon bags order from Jindal Renewables
- L&T wins large orders for power transmission projects
- Wipro's revenue to grow by 4.5% in FY26, says Fitch; reaffirms 'A-' rating
- Praveg signs hotel management agreement with IHCL
- ASK Automotive partners with KYSK for alloy wheel production
- Godrej Properties cancels 2008 land development pact in Kochi
- Senores Pharma to acquire 14 ANDAs from Dr. Reddy's Laboratories
- Reliance unit risks India fine in rebuke for Ambani's empire
- CCI green-lights Ambuja Cements' plan to acquire 72.8% stake in Orient Cement
- Cantabil Retail eyes Rs55cr capex by FY26, to expand production capacity
- Rail Vikas Nigam bags mega order from HPSEBL
- Saudi Aramco weighs bid for BP's Castrol lubricant assets, with special interest in USD2.5bn India arm
- Coforge signs USD1.56bn deal with US travel firm Sabre
- HPCL, Tata Motors launch co-branded diesel exhaust fluid Genuine DEF
- ONGC unit acquires PTC Energy for USD106mn to expand its green portfolio
- Apollo Hospitals to invest Rs2500mn in Oncology Centre
- TCS partners with Vantage Towers for telecom site management
- IRFC looks to finance infra projects having linkages with Railways
- Kalpataru Projects awarded new orders worth Rs23.06bn

- Firm on reducing regulatory burden: FM Nirmala Sitharaman
- Another rate cut in April expected, liquidity key for transmission
- Crisil sees GDP growing at 6.5% in FY26

- US tariffs may flood India with cheap Chinese steel, warn industry experts
- US crude futures fall to USD66.77 a barrel, lowest since November 2024
- Import of US crude hits 2-year high in Feb after latest sanctions on Russia

HIGHLIGHTS OF THE WEEK

03 Mar 2025-07 Mar 2025

NIFTY (WEEKLY)



BANK NIFTY (WEEKLY)



MARKET OUTLOOK

The **Nifty50** weekly chart, indicates the virtual completion of an **advanced harmonic pattern known as AB=CD** and is indicating a potential trend reversal. The resistance zone is expected between 22,620 and 22,730, while support is likely at 22,430. **BankNifty** is currently oscillating within the range of 47,900-48,900, awaiting a breakout in either directions to establish a clear trend. In the **Auto sector**, **Tata Motors** provides reversal indication, having bounced back after testing its long-term trendline support. Similarly, **Force Motors** has broken out from a **Falling Channel Formation**, supported by a **positive crossover in the MACD**. The **Energy segment** has broken out from a **Falling Wedge Formation**, signaling trend reversal (**Reliance-Bullish Shark with positive divergence in the RSI**). We remain bearish on the **IT sector**, with expectations that it will test its long-term trendline before reversing. Meanwhile, the **Metal sector** has completed its rangebound activity and is showing shift in momentum toward the positive. This is evidenced by a dual pattern breakout, combining **Consolidation and Falling Channel formations**, with stocks like **JSL and Tata Steel** confirming **bullish movement through Symmetrical Triangle and Falling Channel Breakouts**, respectively, along with **positive MACD crossovers**.

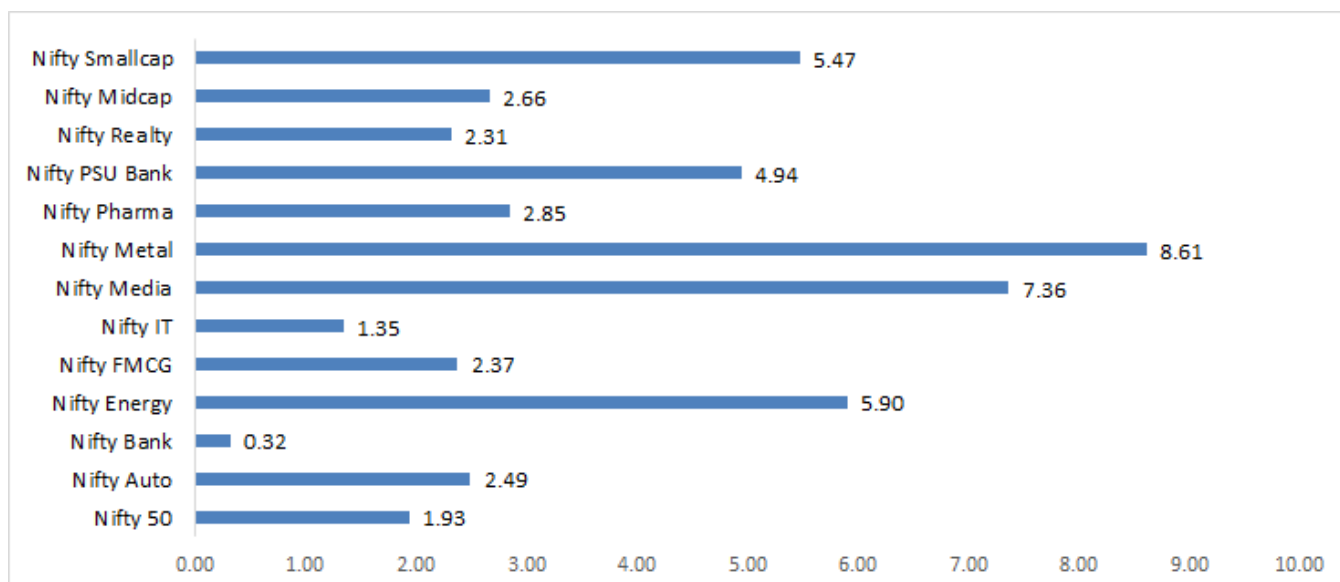
HIGHLIGHTS OF THE WEEK

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NIFTY 50 COMPONENTS (WEEKLY PERFORMANCE)

Adani Enterprises	7.24%	HDFC Bank	(2.44%)	ONGC	2.99%
Adani Ports	6.67%	HDFC Life	2.59%	PowerGrid	4.61%
Apollo Hospital	2.02%	Hero Motocorp	(1.35%)	Reliance	4.04%
Asian Paints	3.71%	Hindalco	8.82%	SBI Life	(1.23%)
Axis Bank	2.21%	HUL	0.54%	SBIN	6.11%
Bajaj Auto	(4.60%)	ICICI Bank	1.02%	ShriRam Finance	1.94%
Bajaj Finance	(1.64%)	IndusInd Bank	(3.84%)	Sun Pharma	1.07%
Bajaj Finserv	(1.67%)	INFY	(0.47%)	Tata Consumer	(0.25%)
BEL	11.71%	ITC	1.98%	Tata Motors	4.32%
Bharti Airtel	4.39%	JSW Steel	5.70%	Tata Steel	10.45%
BPCL	9.45%	Kotak Bank	1.77%	TCS	3.57%
Britannia	3.50%	LT	2.40%	Tech Mahindra	0.41%
Cipla	3.84%	M&M	5.13%	TITAN	(0.23%)
Coal India	3.36%	Maruti	(2.36%)	Trent	3.13%
Dr. Reddy's Labs	1.57%	Nestle India	1.16%	Ultratech	4.67%
Eicher Motors	6.81%	NTPC	6.34%	Wipro	2.12%
Grasim	3.45%				
HCL Tech	(1.15%)				

SECTORAL PERFORMANCE



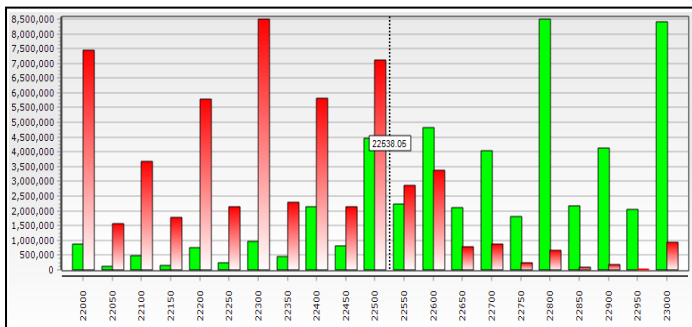
HIGHLIGHTS OF THE WEEK

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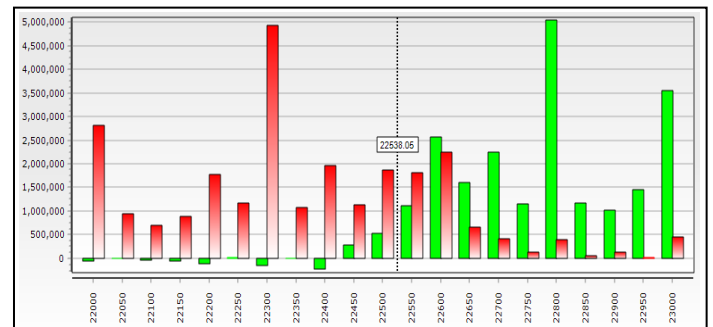
Weekly Derivative:

The weekly chart of Nifty50 suggests an early sign of a trend reversal, supported by a measured move pattern and hidden bullish divergence. Open Interest (OI) data reveals that the 22,800 Call strike has the highest open interest, indicating significant resistance, while the 22,500 Put strike shows the most open interest, signifying strong support. Additionally, the 22,300 Put strike provides a cushion for potential downside risk. For BankNifty, resistance is evident at the 49,000 strike, where most call writing activity is concentrated. Put writing is more prominent around the 48,000 strike, while 48,500 stands out as a pivotal level, with significant open interest accumulated from both call and put players. This suggests that BankNifty is likely to experience short-term range-bound movement, with a breakout on either side offering a clearer trend direction. Given the market's uncertainty, a **Strangle Strategy** could be an effective way to capitalize on potential volatility, with **Nifty's expected range being 300 points and BankNifty's range being 1000 points.**

Nifty OI Concentration Weekly

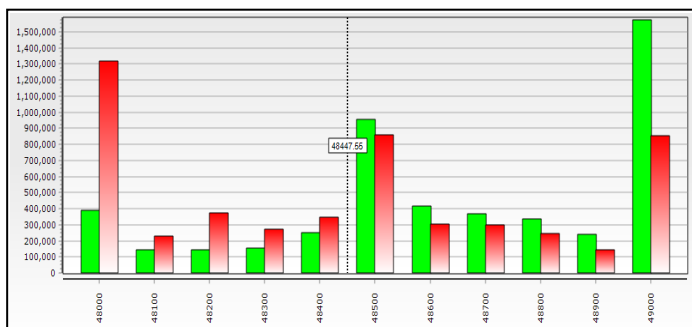


OI Change In Weekly

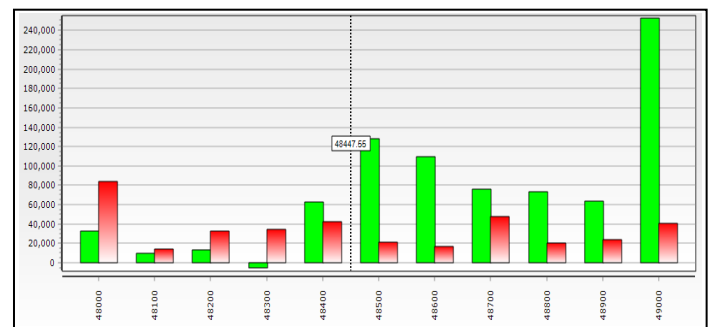


BANK NIFTY

BankNifty OI Concentration Weekly



OI Change In Weekly



Top Long Build Up

Name	LTP	% change	OI	% OI
TITAGARH	758.55	4.92	1131875	69.57
APOLLOTYRE	413.50	2.75	10533200	9.28
SRF	2927.10	2.28	3803625	8.48
CAMS	3364.00	1.94	1227625	8.30

Top Short Build Up

Name	LTP	% change	OI	% OI
OFSS	7535.50	(3.95)	759400	14.32
INDUSINDBK	938.50	(3.61)	47244000	10.38
PIIND	3235.45	(0.98)	1852500	7.70
NYKAA	164.60	(2.77)	42229250	7.51

HIGHLIGHTS OF THE WEEK

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SECTORAL GAINER



With gains of 8.61%, the **Metal sector** outperformed the Benchmark Index. All the components ended the week in green, with **Vedanta (+12.74%)** and **JSL Hisar (+11.15%)** being the top performers, followed by **Tata Steel (+10.45%)** and **HindCopper (+10.16%)**. As shown in the above chart, the sector has completed its rangebound activity and is showing shift in momentum toward the positive. This is evidenced by a dual pattern breakout, combining **Consolidation and Falling Channel formations**.

With the Market sentiment being bullish, all the sectors have ended the week on a positive note.

HIGHLIGHTS OF THE WEEK

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