

ITI Morning Boost



February 04, 2026

NIFTY – 25,727.55 (Daily Chart)



- In Tuesday's trading session, following a surprise positive event, the Nifty opened with a strong gap up but failed to carry its bullish momentum and moved in a sideways direction for most of the session, which still helped the index close on a positive note.
- On the daily scale, the index has formed a bearish candle near the horizontal resistance level. With gap covering still pending, bulls are likely to remain cautious. However, the index managed to close above the 20 DEMA, which is a positive sign for the bulls. To continue its bullish momentum, the index needs to breach and sustain above the 26,340 level.
- **For Wednesday's trading session, 25,660 will act as the initial support level, while on the higher end, 25,870 will serve as the initial resistance level.**

BANK NIFTY – 60,041.30 (Daily Chart)

Nifty Bank Index • 1D • NSE O61,411.20 H61,764.85 L59,793.20 C60,041.30 +1,422.30 (+2.43%)

Vol 368.35M

EMA (20, close, 0, SMA, 5) 59,355.98



- In Tuesday's trading session, the Banking Index opened with a huge gap up, but soon after the opening it gave up some of its gains and then moved in a sideways direction, which helped the index close on a positive note.
- On the daily scale, the index has formed a strong bearish candle, indicating a sell-off at higher levels, but it managed to hold the support of the 20 DEMA, which is a positive sign for the bulls. However, with gap covering still pending, bulls are likely to remain cautious.
- For Wednesday's trading session, 60,300 will act as the initial resistance level, while on the lower end, 59,880 will serve as the initial support level.





STOCK'S IN NEWS

LUPIN: Lupin announced the launch of a generic cancer therapy in the US market. The company has introduced Dasatinib tablets in multiple strengths—20 mg, 50 mg, 70 mg, 80 mg, 100 mg and 140 mg—after securing approval from the US Food and Drug Administration (USFDA).

CMP- 2,185.90
IMPACT- **POSITIVE**

EICHERMOT : Mid-sized motorcycle manufacturer Royal Enfield on Monday posted a 14% rise in total sales to 1,04,322 units in January, compared with 91,132 units in the year-ago period.

CMP- 7,215.00
IMPACT- **POSITIVE**

ABCAPITAL : Aditya Birla Capital Ltd reported a 41% year-on-year rise in net profit to ₹983 crore for the December quarter, driven by strong growth across businesses. The company's revenue grew 30% to ₹14,181 crore during the quarter. Its total lending portfolio expanded 30% YoY to ₹1.90 lakh crore, reflecting robust credit demand and business momentum.

CMP- 345.45
IMPACT- **POSITIVE**

PIDILITIND : Pidilite Industries posted a strong set of Q3 numbers, with net profit rising 11.9% to ₹623.84 crore from ₹557 crore in the same period last year. The company's revenue grew 10.1% year-on-year to ₹3,709.9 crore from ₹3,369 crore. EBITDA for the quarter was ₹894.4 crore, up 12% from ₹798 crore YoY, while the margin improved to 24.1% from 23.7% in the year-ago period.

CMP- 1,427.80
IMPACT- **POSITIVE**



- The US and India have inked a pivotal trade agreement with which both nations stand to gain. By slashing reciprocal tariffs on Indian exports, the deal safeguards vital sectors like agriculture and dairy.
- Finance Minister Nirmala Sitharaman hailed the reduction in tariffs by the US as a game-changer for Indian exporters. This development is likely to fortify the Indian rupee and entice more international investments, positioning India as a key player on the global economic stage.
- The Trade Representative said the US would continue to work on access to certain protected areas of India's agriculture sector, but said tariffs "for a variety of things... tree nuts, wine, spirits, fruits, vegetables, etc, they're going down to zero."

NIFTY50 TOP GAINERS

NIFTY50 TOP LOSERS

| Company | Price | Change | %Gain | | Company | Price | Change | %Gain |
|-----------------|----------|--------|-------|--|---------------|----------|--------|-------|
| Adani Enterpris | 2,202.60 | 207.20 | 10.38 | | Tech Mahindra | 1,716.50 | -7.50 | -0.44 |
| Adani Ports | 1,530.80 | 127.70 | 9.10 | | Bharat Elec | 438.95 | -0.15 | -0.03 |
| Jio Financial | 263.90 | 19.80 | 8.11 | | Nestle | 1,308.00 | -0.30 | -0.02 |
| Bajaj Finance | 964.40 | 60.70 | 6.72 | | | | | |
| Interglobe Avi | 4,946.20 | 259.20 | 5.53 | | | | | |

NIFTY200 TOP GAINERS

NIFTY200 TOP LOSERS

| Company | Price | Change | %Gain | | Company | Price | Change | %Gain |
|-----------------|----------|--------|-------|--|-----------------|----------|---------|-------|
| Waaree Energies | 3,102.40 | 307.30 | 10.99 | | Policy Bazaar | 1,462.10 | -101.20 | -6.47 |
| Adani Enterpris | 2,202.60 | 207.20 | 10.38 | | Varun Beverages | 451.10 | -15.20 | -3.26 |
| Adani Green | 932.10 | 88.15 | 10.44 | | Godrej Consumer | 1,146.40 | -23.70 | -2.03 |
| ADANIENSOL | 974.40 | 89.80 | 10.15 | | Blue Star | 1,817.80 | -20.40 | -1.11 |
| Adani Ports | 1,530.80 | 127.70 | 9.10 | | KPIT Tech | 989.80 | -8.70 | -0.87 |

OPEN INTEREST GAINERS

OPEN INTEREST LOSERS

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|------------|----------|--------|---------|----------------------|----------------|
| MUTHOOTFIN | 3,641.90 | 82.30 | 2.31% | 4104.9 | 11.96% |
| KEI | 4,346.00 | 300.20 | 7.42% | 1653 | 9.95% |
| SWIGGY | 317.75 | 9.75 | 3.17% | 28208.7 | 9.74% |
| MANKIND | 2,160.00 | 84.60 | 4.08% | 2247.8 | 8.80% |
| BHARATFORG | 1,543.70 | 99.90 | 6.92% | 6845.5 | 8.75% |

| Symbol | Price | Change | Change% | Open Interest ('000) | Open Int Chg % |
|------------|----------|--------|---------|----------------------|----------------|
| AMBER | 6,173.00 | 177.00 | 2.95% | 930.6 | -19.91% |
| PGEL | 559.80 | -4.20 | -0.74% | 12055.5 | -17.10% |
| POWERGRID | 280.35 | 12.70 | 4.75% | 88277.8 | -13.01% |
| 3600ONE | 1,173.10 | 58.50 | 5.25% | 2485 | -11.97% |
| FEDERALBNK | 286.20 | 3.85 | 1.36% | 49415 | -11.74% |

INDEX HIGHEST OI

| F&O Ban list | Monthly exp | Indices | Highest CE strike | Highest PE strike | PCR OI |
|--------------|-------------|-----------|-------------------|-------------------|--------|
| SAMMAANCAP | 24/02/26 | NIFTY | 26,000 | 25,500 | 1.15 |
| - | 24/02/26 | BANKNIFTY | 60,000 | 60,000 | 0.98 |



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 | 43,448.52 | 40,633.04 | 2,815.48 | 61,223.43 | 58,445.59 | 2,777.84 |
| 03-Feb-26 | 27,677.68 | 22,441.40 | 5,236.28 | 28,206.21 | 27,191.97 | 1,014.24 |
| 02-Feb-26 | 15,172.55 | 17,005.01 | -1,832.46 | 18,626.43 | 16,180.10 | 2,446.33 |
| 01-Feb-26 | 598.29 | 1,186.63 | -588.34 | 14,390.79 | 15,073.52 | -682.73 |

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 | 84,459.11 | 80,318.29 | 4,140.82 | 69,027.36 | 69,058.56 | -31.20 |
| 03-Feb-26 | 41,056.67 | 36,347.36 | 4,709.31 | 31,383.72 | 31,645.90 | -262.18 |
| 02-Feb-26 | 32,515.27 | 31,279.07 | 1,236.20 | 27,746.97 | 28,175.70 | -428.73 |
| 01-Feb-26 | 10,887.17 | 12,691.86 | -1,804.69 | 9,896.67 | 9,236.96 | 659.71 |



*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 | 7.29 | -6.17 | -14.97 | -28.55 | -22.7 | -6.62 |
| Readymade Garments/ Apparels | 6.13 | 0.3 | -10.6 | -18.4 | -19.21 | -24.68 |
| Air Transport Service | 5.16 | -1.84 | -12.08 | -25.32 | -28 | -18.37 |
| Textiles | 4.79 | 2.76 | -7.86 | -14.62 | -15.31 | -16.9 |
| Financial Services | 4.77 | -2.56 | -4.92 | -2.7 | 4.32 | 18.26 |



*Data in above table is based on previous day closing bases

Result calendar for F&O stocks

| 02-02-2026 | 03-02-2026 | 04-02-2026 | 05-02-2026 | 06-02-2026 |
|------------|------------|------------|------------|------------|
| INDUSTOWER | ABCAPITAL | APOLLOTYRE | BHARTIARTL | BOSCHLTD |
| POLICYBZR | ADANIENT | BAJAJFINSV | GODREJPROP | CROMPTON |
| UPL | ADANIPORTS | CUMMINSIND | HEROMOTOCO | SHREECEM |
| | BAJFINANCE | TATAPOWER | HINDCOPPER | TATASTEEL |
| | NMDC | TIINDIA | IOC | |
| | ZYDUSWELL | TRENT | NYKAA | |
| | | | PAGEIND | |
| | | | PFC | |
| | | | POWERINDIA | |
| | | | RVNL | |
| | | | | |

UPCOMING ECONOMIC EVENTS

| Wednesday, 4 February 2026 | Country | Event's | Forecast | | Previous |
|----------------------------|---------|-------------------------------------|----------|--|----------|
| 10:30 | IN | S&P Global Services PMI (Jan) | 59.3 | | 58.0 |
| 15:30 | EU | S&P Global Services PMI (Jan) | 1.8% | | 1.9% |
| 18:45 | US | ADP Nonfarm Employment Change (Jan) | 48K | | 41K |
| 20:15 | US | S&P Global Services PMI (Jan) | 52.5 | | 52.5 |
| 20:30 | US | ISM Non-Manufacturing PMI (Jan) | 53.8 | | 53.8 |
| 21:00 | US | Crude Oil Inventories | | | -2.295M |
| Thursday, 5 February 2026 | | | | | |
| 17:30 | GB | BoE Interest Rate Decision (Feb) | 3.75% | | 3.75% |
| 18:45 | EU | Deposit Facility Rate (Feb) | 2.00% | | 2.00% |
| 18:45 | EU | ECB Interest Rate Decision (Feb) | 2.15% | | 2.15% |
| 19:00 | US | Initial Jobless Claims | 213K | | 209K |
| 19:15 | EU | ECB Press Conference | | | |



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