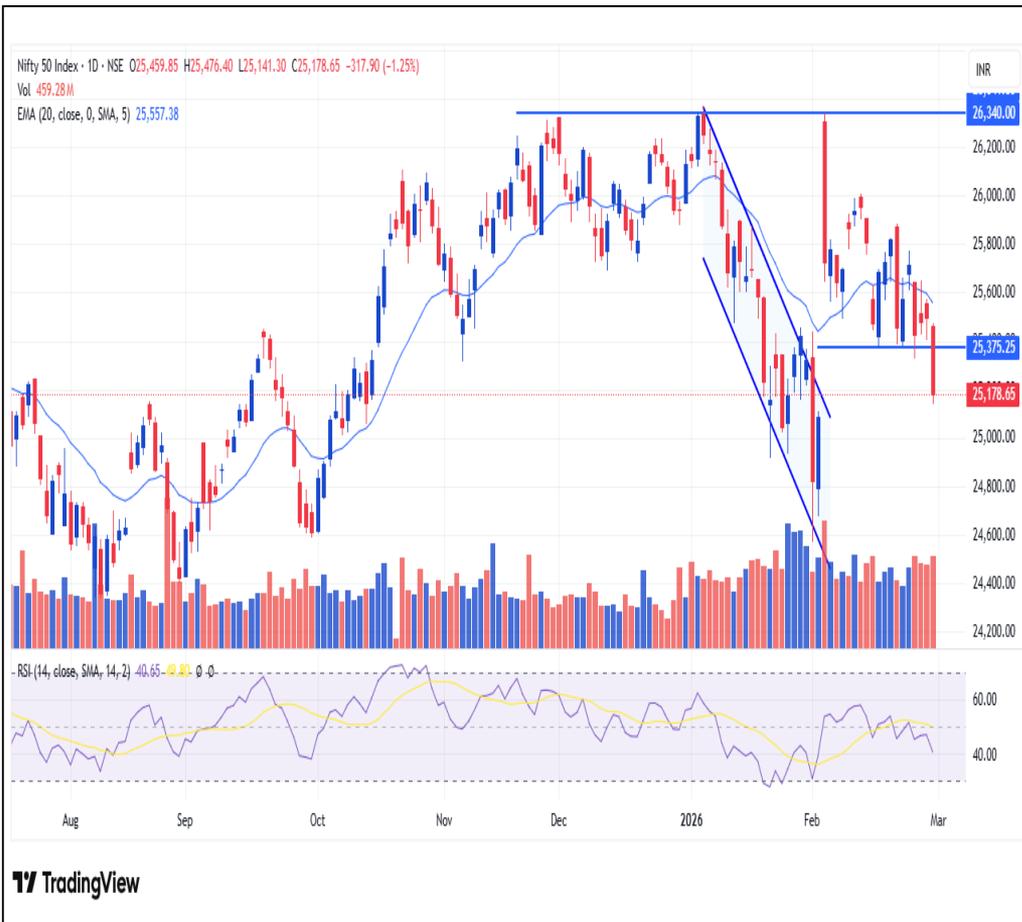


# ITI Morning Boost

March 04, 2026

# NIFTY – 25,178.65 (Daily Chart)



• In Monday's trading session, the Nifty opened with a huge gap down and gradually moved southward, extending its losses. However, toward the end of the session, the index bounced from lower levels, helping it trim some of its losses.

• On a daily scale, the index has formed a bullish candle at the horizontal support level of 24,590. Despite this bounce, the index continues to trade below the 20 DEMA level, indicating the continuation of bearish momentum. The RSI is gradually moving southward, reflecting weakness in the index.

• For Wednesday's trading session, 24,985 will act as the initial resistance level, while on the lower end, 24,790 will act as the initial support level.



# BANK NIFTY – 59,839.65 (Daily Chart)



- In Monday's trading session, the banking index opened with a gap down and remained under pressure throughout the session. However, toward the end of the session, the index managed to bounce from lower levels, helping it recover some of its losses.

- On a daily scale, the index has formed a strong bullish candle with a wick at the top. Despite the recovery, the index continues to trade below the 20 DEMA level, and the RSI is gradually moving southward, indicating weakness in the index.

- **For Wednesday's trading session, 60,190 will act as the initial resistance level, while on the lower end, 60,110 will act as the initial support level.**

# BEL CMP- 453.95 ( Daily Chart)

BUY ABOVE 454.70 SL 450.20 TGT 565

Bharat Electronics Limited · 1D · NSE O442.10 H456.70 L441.70 C453.95 +9.25 (+2.08%)  
Vol 35.03M  
EMA (20, close, 0, SMA, 5) 439.45



# HAVELLS CMP- 1,354.00 (Daily Chart)

SELL FUT BELOW 1352 SL 1365 TGT 1,324.

Havells India Limited · 1D · NSE O1,360.00 H1,383.60 L1,333.70 C1,354.00 -43.10 (-3.08%)  
Vol 861.6K  
EMA (20, close, 0, SMA, 5) 1,391.15



**ADANI PORT** : Total cargo handled in February up 16% from last year to 42.5 MMT led by Containers and dry cargo. Logistics rail volume in February up 3% from last year. For FY26 so far, total cargo handled up 11% from last year to 454.76 MMT, led by 20% growth in containers.

CMP- 1,470.30  
IMPACT- **POSITIVE**

**CIPLA** : The company has entered into a 60:40 JV agreement with Kemwell Biopharma Pvt. Ltd. to incorporate a JV company in India. The JV will undertake the business of developing, applying for and obtaining licenses for manufacturing, commercializing, importing and exporting biologic products and licensing or outsourcing of any or all such activities. Kemwell offers end-to-end services for Global biopharma clients and has a unit in Bengaluru certified by the USFDA, which includes 5,000L bioreactor capacity, sterile fill–finish, and advanced development labs for protein therapeutics.

CMP- 1,351.60  
IMPACT- **POSITIVE**

**NAUKRI** : Feb jobspeak report shows meaningful recovery in IT hiring, while AI momentum continues. IT sector hiring up 6% overall, while insurance sector hiring up 28%, led by a strong surge in MNC hiring. BPO/ITES hiring up 22% overall.

CMP- 998.50  
IMPACT- **POSITIVE**



- Russia is ready to supply energy to India if the West Asia conflict disrupts supplies from the Gulf. This comes as India steps up measures to secure its economic security amid maritime route disruptions. The Ministry of External Affairs expressed concern over attacks on merchant shipping. India is taking emergency trade support measures to ensure continuity of essential imports.
- The National Highways Authority of India has awarded a major project to build the Bhubaneswar Bypass. This 111 km, six-lane ring road will connect Rameshwar to Tangi. Three companies will construct the project in three packages. The bypass aims to improve connectivity and reduce traffic in Bhubaneswar, Cuttack, and Khordha.
- New Delhi highlighted persistent barriers faced by developing economies and LDCs in acquiring, adapting and deploying critical technologies, including export controls on inputs such as semiconductor chips and rare earth minerals, as well as rigid intellectual property regimes.

## NIFTY50 TOP GAINERS

## NIFTY50 TOP LOSERS

| Company        | Price    | Change | %Gain |  | Company        | Price     | Change  | %Gain |
|----------------|----------|--------|-------|--|----------------|-----------|---------|-------|
| Bharat Elec    | 453.95   | 9.25   | 2.08  |  | Interglobe Avi | 4,520.40  | -306.80 | -6.36 |
| Hindalco       | 940.00   | 15.30  | 1.65  |  | Larsen         | 4,066.70  | -211.60 | -4.95 |
| ONGC           | 282.20   | 2.50   | 0.89  |  | Adani Ports    | 1,470.30  | -50.70  | -3.33 |
| Sun Pharma     | 1,752.50 | 15.50  | 0.89  |  | Maruti Suzuki  | 14,388.00 | -469.00 | -3.16 |
| Dr Reddys Labs | 1,294.40 | 8.10   | 0.63  |  | TMPV           | 370.60    | -12.05  | -3.15 |

## NIFTY200 TOP GAINERS

## NIFTY200 TOP LOSERS

| Company        | Price    | Change | %Gain |  | Company        | Price    | Change  | %Gain |
|----------------|----------|--------|-------|--|----------------|----------|---------|-------|
| Kwality Wall's | 28.01    | 1.89   | 7.24  |  | Interglobe Avi | 4,520.40 | -306.80 | -6.36 |
| Solar Ind.     | 13,989   | 485.00 | 3.59  |  | RVNL           | 299.45   | -16.90  | -5.34 |
| MUTHOOTFIN     | 3,471.90 | 118.40 | 3.53  |  | IREDA          | 115.93   | -6.32   | -5.17 |
| TIINDIA        | 2,837.60 | 84.20  | 3.06  |  | Larsen         | 4,066.70 | -211.60 | -4.95 |
| KEI Industries | 5,206.00 | 125.60 | 2.47  |  | Adani Green    | 903.55   | -43.80  | -4.62 |

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



## OPEN INTEREST GAINERS

## OPEN INTEREST LOSERS

| Symbol     | Price    | Change | Change% | Open Interest ('000) | Open Int Chg % |
|------------|----------|--------|---------|----------------------|----------------|
| KEI        | 5,103.00 | 93.90  | 1.87%   | 1,706                | 18.12%         |
| HINDPETRO  | 426.25   | -12.80 | -2.92%  | 44,539.90            | 11.36%         |
| 360ONE     | 1,078.60 | -25.20 | -2.28%  | 3,121.00             | 10.50%         |
| OIL        | 487.35   | -0.65  | -0.13%  | 18,552.80            | 8.31%          |
| FEDERALBNK | 296.50   | -3.50  | -1.17%  | 54,925               | 4.67%          |

| Symbol    | Price    | Change | Change% | Open Interest ('000) | Open Int Chg % |
|-----------|----------|--------|---------|----------------------|----------------|
| ABCAPITAL | 339.90   | -1.60  | -0.47%  | 50,399.80            | -41.25%        |
| POLYCAB   | 8,582.50 | -49.50 | -0.57%  | 2,259.30             | -17.67%        |
| PETRONET  | 309.75   | -15.05 | -4.60%  | 32,262.00            | -17.31%        |
| DALBHARAT | 1,963.80 | -25.10 | -1.26%  | 2,111.90             | -15.47%        |
| LTF       | 276.85   | -1.40  | -0.50%  | 55,113.80            | -14.46%        |

## INDEX HIGHEST OI

| F&O Ban list | Monthly exp | Indices   | Highest CE strike | Highest PE strike | PCR OI |
|--------------|-------------|-----------|-------------------|-------------------|--------|
| SAMMAANCAP   | 30/03/26    | NIFTY     | 26,000            | 25,000            | 1.18   |
| -            | 30/03/26    | BANKNIFTY | 61,000            | 61,000            | 1.00   |



## 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 | 12,737.34      | 16,032.98   | -3,295.64            | 21,110.66      | 12,516.79   | 8,593.87             |
| 02-Mar-26       | 12,737.34      | 16,032.98   | -3,295.64            | 21,110.66      | 12,516.79   | 8,593.87             |

## 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 | 25,078.64      | 24,557.39   | 521.25               | 20,476.64      | 20,284.17   | 192.47               |
| 02-Mar-26       | 25,078.64      | 24,557.39   | 521.25               | 20,476.64      | 20,284.17   | 192.47               |



## TOP SECTORS PERFORMANCE OF THE DAY

| Name                               | Daily (%) | 1 Week (%) | 1 Month (%) | 3 Months (%) | 6 Months (%) | 1 Year (%) |
|------------------------------------|-----------|------------|-------------|--------------|--------------|------------|
| Sugar                              | 1.68      | 2.97       | 2.34        | -8.21        | -15.11       | -6.91      |
| Power Infrastructure               | 0.81      | -3.87      | -13.47      | -27.83       | -28.75       | 5.43       |
| Petrochemicals                     | 0.7       | -0.82      | 4.87        | -7.96        | -16.27       | -13.71     |
| Telecom Equipment & Infra Services | 0.69      | 2.6        | 14.93       | -8.6         | -8.69        | -12.24     |
| Cement - Products                  | 0.55      | -2.83      | -3.76       | -13.18       | -15.66       | -7.65      |



# UPCOMING ECONOMIC EVENTS

| Wednesday, 4 March 2026 | Country | Event's                             | Forecast |  | Previous |
|-------------------------|---------|-------------------------------------|----------|--|----------|
| 07:00                   | CN      | Manufacturing PMI (Feb)             | 49.1     |  | 49.3     |
| 10:30                   | IN      | S&P Global Services PMI (Feb)       | 58.4     |  | 58.4     |
| 15:00                   | CH      | SNB Press Conference                |          |  |          |
| 18:45                   | US      | ADP Nonfarm Employment Change (Feb) | 49K      |  | 22K      |
| 20:15                   | US      | S&P Global Services PMI (Feb)       | 52.3     |  | 52.7     |
| 20:30                   | US      | ISM Non-Manufacturing PMI (Feb)     | 53.5     |  | 53.8     |
| 21:00                   | US      | Crude Oil Inventories               |          |  | 15.989M  |
| Thursday, 5 March 2026  |         |                                     |          |  |          |
| 19:00                   | US      | Initial Jobless Claims              | 215K     |  | 212K     |
| Friday, 6 March 2026    |         |                                     |          |  |          |
| 17:00                   | IN      | FX Reserves, USD                    | 215K     |  | 212K     |
| 18:00                   | US      | Retail Sales (MoM) (Jan)            | -0.3%    |  | 0.0%     |

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