ITI Morning Boost

September 17, 2025

NIFTY – 25,239.10 (Daily Chart)

• In Tuesday's trading session, the Nifty opened on a flattish note but soon gained bullish momentum, which helped the index close at the day’s high levels.

• On the daily scale, the index has formed a strong bullish candle, enabling it to close above the horizontal resistance level. The RSI is gradually moving northward, indicating improving strength in the index.

• **For Wednesday's trading session, 25,250 will act as an initial resistance level, while on the lower end, 25,160 will act as an initial support level.**

BANK NIFTY – 55,147.60 (Daily Chart)

- In Tuesday's trading session, the banking index opened on a positive note and gradually moved northward. In the second half, it traded sideways, which helped the index to close on a positive note.

- On the daily scale, the index has formed a strong bullish candle and managed to close above the 20 DEMA level. It also breached the resistance of the falling channel and closed above it. Additionally, the RSI is gradually moving northward, indicating improving strength in the index.

- **For Wednesday's trading session, 55,190 will act as an initial resistance level, while on the lower end, 55,030 will act as an initial support level.**

MGL CMP- 1,363.20 (Daily Chart) BUY ABOVE 1364 SL 1351 TGT 1392.

TORNTPOWER CMP- 1,261.90 (Daily Chart)

SELL FUT BELOW 1262 SL 1274 TGT 1235.

STOCK'S IN NEWS

JINDALSTEL : Naveen Jindal-owned Jindal Steel's overseas subsidiary, Jindal Steel International, has entered talks with German conglomerate thyssenkrupp AG to potentially acquire its European steel business, thyssenkrupp Steel Europe. The company has submitted a non-binding bid and has committed to support the business's decarbonisation plan.

CMP- 1,053.35
IMPACT- **POSITIVE**

COALINDIA : Coal India has been declared the preferred bidder by the Ministry of Mines for the Ontillu-Chandragiri REE (Rare Earth Element) exploration block. The exploration license deed will be executed within one year of the Letter of Intent issuance by the respective state governments.

CMP- 395.80
IMPACT- **POSITIVE**

LUPIN : The US FDA conducted an inspection at Lupin's Nagpur injectable facility between September 8–16, concluding the inspection with six observations.

CMP- 2,051.80
IMPACT- **NEGATIVE**

DRREDDY : The company announced the launch of the novel molecule Tegoprazan under the brand name PCAB, for the treatment of acid-related gastrointestinal diseases in India.

CMP- 1,310.40
IMPACT- **POSITIVE**

ECONOMIC NEWS

- The United States has declined India's request for discussions at the World Trade Organization regarding tariffs on copper. Washington argues these tariffs are not safeguard measures. This marks the third instance of the US refusing such consultations with India. The US imposed a 50% tariff on copper imports under Section 232 of its Trade Expansion Act.

- India and the US held positive trade discussions in New Delhi. Both sides aim for an early, mutually beneficial trade agreement. The US team was led by Brendan Lynch. This meeting was the first after the US imposed tariffs on India over Russian oil purchases. Discussions covered various aspects of the trade deal.

NIFTY50 TOP GAINERS

Company	Price	Change	%Gain
Kotak Mahindra	2,021.70	50.90	2.58
Larsen	3,667.80	81.60	2.28
M&M	3,608.00	77.70	2.20
Maruti Suzuki	15,573.00	308.00	2.02
Eicher Motors	6,927.50	126.50	1.86

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain
TATA Cons. Prod	1,092.10	-10.50	-0.95
Shriram Finance	618.10	-5.55	-0.89
Asian Paints	2,480.90	-21.70	-0.87
Nestle	1,204.20	-8.30	-0.68
Bajaj Finance	1,003.25	-6.60	-0.65

NIFTY200 TOP GAINERS

Company	Price	Change	%Gain
Chola Inv Finance	1,583	65.40	4.31
GMR Infra	93	3.68	4.12
M&M Financial	279	8.45	3.13
Swiggy	437	12.40	2.91
Premier Energies	1,081	30.00	2.85

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain
Vodafone Idea	8	-0.21	-2.46
Godrej Consumer	1,229	-28.2	-2.25
Ola Electric Mobilit	59	-1.18	-1.96
Varun Beverages	463	-8.75	-1.86
Indian Hotels	779	-12.21	-1.55

OPEN INTEREST GAINERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
TORNTPOWER	1,266.50	-5.90	-0.46%	3577.9	8.84%
AUBANK	713.50	-3.60	-0.50%	21391	8.48%
SUZLON	59.24	0.91	1.56%	134576	7.39%
KEI	4,194.60	84.70	2.06%	964.8	6.82%
MAXHEALTH	1,164.00	-14.80	-1.26%	14053.7	6.21%

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
HFCL	76.62	2.63	3.55%	101284.4	-8.75%
KPITTECH	1,254.00	-3.4	-0.27%	2928	-5.37%
NBCC	110.10	2.04	1.89%	56478.5	-4.92%
UPL	704.35	13.95	2.02%	38591.8	-4.38%
ANGELONE	2,220	-37.30	-1.65%	3905.5	-4.29%

INDEX HIGHEST OI

F&O Ban list
ANGELONE
HFCL
OFSS
RBLBANK

Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
30/09/25	NIFTY	26,000	25,000	1.16
30/09/25	BANKNIFTY	57,000	54,000	1.08

FII & DII TRADING ACTIVITY CASH

	FII Rs Crores			DII Rs Crores		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,23,566.53	1,33,772.07	-10,204.54	1,54,377.98	1,23,778.60	30,599.38
16-Sep-25	11,942.44	11,634.12	308.32	11,643.46	10,124.73	1,518.73
15-Sep-25	8,169.16	9,437.75	-1,268.59	10,173.17	8,239.84	1,933.33
12-Sep-25	11,094.18	10,964.60	129.58	11,675.26	10,119.24	1,556.02
11-Sep-25	10,008.75	13,481.12	-3,472.37	14,831.21	10,785.67	4,045.54

FII & DII TRADING ACTIVITY STOCK F&O

	FII Stock Fut			FII Stock Opt		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,89,440.27	1,92,411.98	-2,971.71	2,43,768.45	2,44,991.55	-1,223.10
16-Sep-25	15,675.43	14,877.63	797.80	26,237.48	26,352.95	-115.47
15-Sep-25	12,192.60	13,854.52	-1,661.92	22,792.63	22,967.94	-175.31
12-Sep-25	16,156.78	15,097.47	1,059.31	25,130.57	25,248.70	-118.13
11-Sep-25	13,869.95	16,644.84	-2,774.89	23,484.73	23,914.77	-430.04

TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Ship Building	3.39	34.99	33.49	49.07	63.25	34.55
Leather	3.25	3.55	7.73	4.92	20.37	-13.58
Marine Port & Services	2.81	5.68	7.11	3.17	23.5	-16.25
Readymade Garments/ Apparells	2.7	5.27	4.96	-3.12	11.99	-3.71
Tobacco Products	2.54	0.73	5.02	8.53	30.1	-6.92

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

UPCOMING ECONOMIC EVENTS

Wednesday, September 17, 2025	Country	Event's	Forecast		Previous
11:30	GB	CPI (YoY) (Aug)	3.8%		3.8%
14:30	EU	CPI (YoY) (Aug)	2.1%		2.1%
19:15	CA	BoC Interest Rate Decision	2.50%		2.75%
20:00	US	Crude Oil Inventories			3.939M
23:30	US	FOMC Economic Projections			
23:30	US	FOMC Statement			
23:30	US	Fed Interest Rate Decision	4.25%		4.50%
Thursday, September 18, 2025					
00:00	US	FOMC Press Conference			
16:30	GB	BoE Interest Rate Decision (Sep)	4.00%		4.00%
18:00	US	Initial Jobless Claims	245K		263K
18:00	US	Philadelphia Fed Manufacturing Index (Sep)	1.4		-0.3

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