

# ITI Morning Boost

August 18, 2025

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

# NIFTY – 24,631.30 (Daily Chart)



- In Thursday's trading session, the Nifty witnessed a muted performance, hovering within the range of 24,665–24,615 levels and ending with a flattish close.
- On the daily scale, the index formed a small bullish candle with a wick on the top. However, it continues to hold its bearish structure, forming lower lows and lower highs, while trading below the 20 DEMA, which signals a continuation of bearish momentum.
- For Monday's trading session, 24,600 will act as an initial support level, while 24,670 will serve as the initial resistance level.

# BANK NIFTY – 55,341.85 (Daily Chart)



• In Thursday's trading session, the banking index opened on a positive note but failed to sustain its momentum, hovering within the range of 55,260–55,450 levels.

• On the daily scale, the index formed a bullish candle; however, it continues to maintain its bearish structure by forming lower lows and lower highs. The index remains below the 20 DEMA, and a sustained move above this level will be crucial for resuming its upward journey.

• For Monday's trading session, 55,255 will act as an initial support level, while 55,440 will serve as the initial resistance level.





**IDEA** : The telecom company's Q1 FY26 net loss of ₹6,608 crore, narrowing from ₹7,166 crore in Q4 FY25. Revenue rose 5% YoY to ₹11,022.5 crore, while ARPU grew 15% to ₹177.

**GLENMARK** : The drugmaker firm's Q1 FY26 net profit fell 86.2% YoY to ₹46.8 crore, while revenue inched up 0.6% to ₹3,264 crore. EBITDA slipped 1.4% to ₹580 crore, with margins easing to 17.7%.

**JKCEMENT** : The Board has approved a greenfield expansion project involving a new cement line with a capacity of 7 million tonnes per annum (MnTPA). This includes a clinkerisation unit of 4 MnTPA and cement grinding capacity of 3 MnTPA at Jaisalmer, Rajasthan, along with two split grinding units, each with a capacity of 2 MnTPA, located in Rajasthan and Punjab. The total proposed investment is estimated at Rs 4,805 crore.

**PVRINOX** : The company has opened an 8-screen multiplex at Mahindra Millennium Mall in Bengaluru, Karnataka, and a 10-screen megaplex at Sky City Mall in Borivali, Mumbai. With these launches, it now operates the largest multiplex network with 1,763 screens across 355 properties in 111 cities (India and Sri Lanka).

CMP- 6.15  
IMPACT- **POSITIVE**

CMP- 2,044.60  
IMPACT- **NEGATIVE**

CMP- 7,001.50  
IMPACT- **POSITIVE**

CMP- 1,079.00  
IMPACT- **POSITIVE**



- India's foreign exchange reserves increased significantly. The reserves rose by \$4.74 billion, reaching \$693.62 billion for the week ending August 8. Foreign currency assets also saw a rise. Gold reserves increased as well. The special drawing rights also went up. India's reserve position with the IMF experienced a positive change during the reporting week.
- India's wholesale prices experienced a deeper deflation in July, primarily due to declining food and fuel costs, marking the second consecutive month in negative territory. Experts anticipate a shift towards inflation in August, driven by rising food and crude oil prices, alongside unfavorable base effects. Prolonged deflation could negatively impact the income of farming households, potentially hindering rural demand recovery.

## NIFTY50 TOP GAINERS

Company	Price	Change	% Change
Wipro	246.81	5.16	2.14
Eternal	318.4	6.05	1.94
HDFC Life	788.75	12.2	1.57
Infosys	1,448	21.1	1.48
Asian Paints	2,529	28.5	1.14

## NIFTY50 TOP LOSERS

Company	Price	Change	% Change
Tata Steel	155.3	-4.88	-3.05
Adani Ports SEZ	1,300	-19.3	-1.47
Tech Mahindra	1,487	-19.6	-1.31
Hero MotoCorp	4,708	-60.6	-1.28
BEL	384.9	-3.96	-1.02

## NIFTY200 TOP GAINERS

Company	Price	Change	% Change
Muthoot Finance	2,757.00	248.00	9.87
Bajaj Housing Fin	112.72	4.16	3.84
Kalyan Jewellers Ind	533.50	17.90	3.47
Tata Comm	1,695	55.1	3.37
Info Edge	1,365.00	39.50	2.98

## NIFTY200 TOP LOSERS

Company	Price	Change	% Change
NMDC	69.40	-3.18	-4.39
HPCL	394.35	-16.75	-4.08
Max Healthcare	1,221.00	-46.40	-3.67
Vodafone Idea	6.15	-0.21	-3.31
NHPC	82.32	-2.80	-3.28





## OPEN INTEREST GAINERS

## OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest (K)	Open Int Chg %
NUVAMA	6,972.00	11.00	0.16%	176	13.60%
INOXWIND	137.29	-0.91	-0.66%	40824.7	10.81%
MANKIND	2,478.80	2.50	0.10%	1770.8	7.18%
OIL	399.75	-6.25	-1.54%	11211.2	6.57%
NATIONALUM	187.82	2.90	-1.52%	63348.8	5.93%

Symbol	Price	Change	Change%	Open Interest (K)	Open Int Chg %
BLUESTARCO	1,785.60	31.70	1.81%	1101.8	-18.49%
KFINTECH	1,121.80	12.50	1.13%	2169.4	-6.62%
LT	3,678.70	-29.40	-0.79%	13253.6	-5.86%
FORTIS	932.90	-15.70	-1.66%	9859.5	-5.85%
AUBANK	748.80	8.35	1.13%	20628	-4.98%

## INDEX HIGHEST OI

F&O Ban list
PGEL
PNBHOUSING
RBLBANK
TITAGARH

Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
28/08/25	NIFTY	25,000	24,500	0.97
28/08/25	BANKNIFTY	57,000	57,000	0.71



## 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	1,17,143.39	1,41,334.90	-24,191.51	1,50,506.36	94,711.08	55,795.28
14-Aug-25	13,646.01	15,572.77	-1,926.76	13,144.45	9,248.77	3,895.68
13-Aug-25	11,350.06	14,994.49	-3,644.43	13,982.46	8,358.67	5,623.79
12-Aug-25	9,532.22	12,931.02	-3,398.80	11,888.48	8,380.55	3,507.93
11-Aug-25	9,477.30	10,679.95	-1,202.65	15,109.07	9,136.71	5,972.36

## 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	1,84,905.07	1,85,771.50	-866.43	1,98,329.01	1,96,471.58	1,857.43
14-Aug-25	16,006.15	17,386.11	-1,379.96	21,759.51	21,146.46	613.05
13-Aug-25	22,714.62	20,122.90	2,591.72	20,666.94	19,989.35	677.59
12-Aug-25	15,336.96	14,884.47	452.49	21,406.77	21,534.40	-127.63
11-Aug-25	18,093.81	15,684.99	2,408.82	20,354.09	20,041.53	312.56



\*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 (%)
Ferro Alloys	1.12	3.71	-1.42	5.01	-3.5	-1.16
Telecomm Equipment & Infra Services	1.03	-0.79	-9.69	-4.22	-10.63	-29.57
Oil Drill/Allied	0.93	6.46	-1.16	6.26	18.71	-20.26
Education	0.51	6.01	-4.34	-7.31	-16.36	-29.41
Automobile	0.2	2.85	5.19	19.07	32.8	6.08



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# UPCOMING ECONOMIC EVENTS

Wednesday, August 20, 2025	Country	Event's	Forecast		Previous
07:30	NZD	RBNZ Interest Rate Decision	3.00%		3.25%
11:30	GBP	CPI (YoY) (Jul)	3.70%		3.60%
14:30	EUR	CPI (YoY) (Jul)	2.00%		2.00%
0.83	USD	Crude Oil Inventories			3.036M
0.98	USD	FOMC Meeting Minutes	220K		226K
Thursday, August 21, 2025					
10:30	INR	S&P Global Manufacturing PMI (Aug)			59.1
10:30	INR	S&P Global Services PMI (Aug)			60.5
18:00	USD	Initial Jobless Claims	227K		224K
0.75	USD	Philadelphia Fed Manufacturing Index (Aug)	5.9		15.9
0.80	USD	S&P Global Manufacturing PMI (Aug)	49.9		49.8
0.80	USD	S&P Global Services PMI (Aug)	53.3		55.7
0.81	USD	Existing Home Sales (Jul)	3.92M		3.93M



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