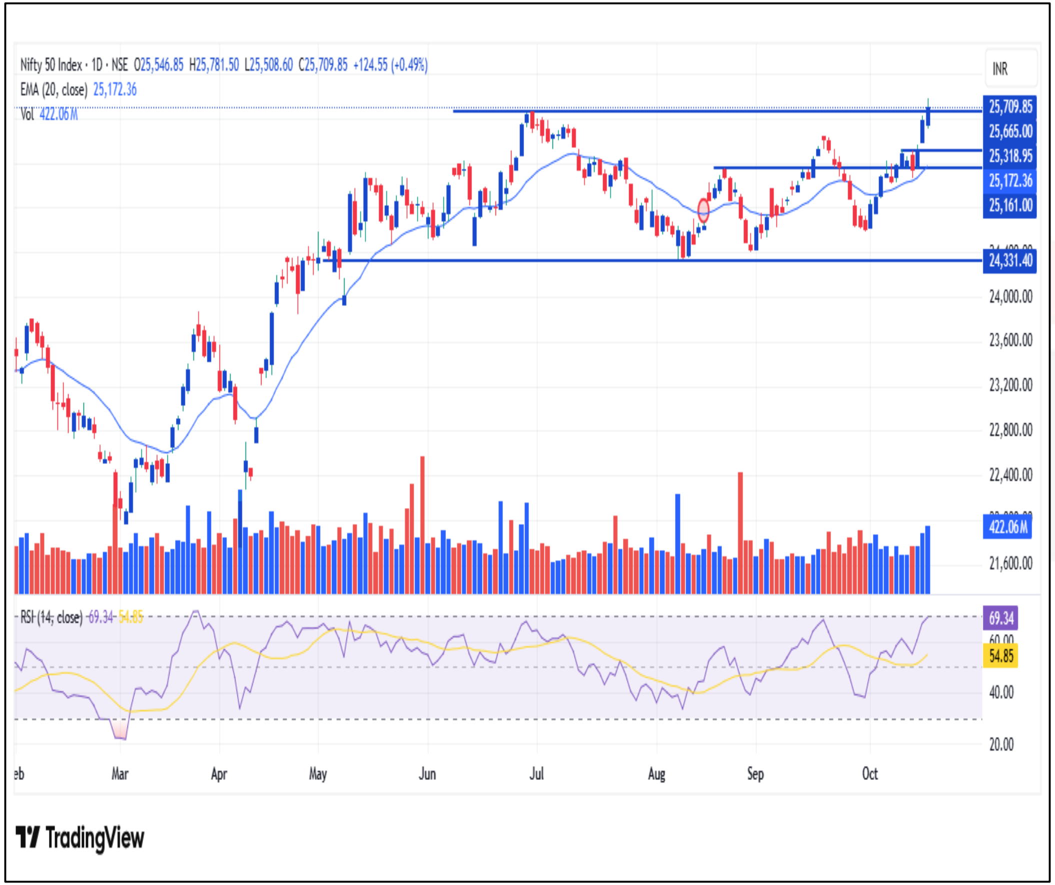
THE INVESTMENT TRUST OF INDIA
RETAIL BROKING

ITI Morning Boost

October 20, 2025

NIFTY – 25,709.85 (Daily Chart)



- In Friday's trading session, the Nifty opened on a negative note but managed to bounce from lower levels and gradually moved northward during the first half of the session. In the second half, the index moved sideways, which helped it sustain at higher levels, resulting in a positive closing.

- On the daily scale, the index has formed a strong bullish candle, helping it close above the horizontal resistance level. The index continues to trade above the 20 DEMA, indicating ongoing bullish momentum. However, the RSI has entered the overbought zone, which is a cautious sign for the bulls.

- **For Monday's trading session, 25,780 will act as an initial resistance level, while on the lower end, 25,660 will act as an initial support level.**

BANK NIFTY – 57,713.35 (Daily Chart)

• In Friday's trading session, the Banking Index opened on a negative note but managed to recover from lower levels and gradually moved northward during the first half of the session. In the second half, the index traded sideways, which helped it sustain at higher levels, resulting in a positive closing.

• On the daily scale, the index has formed a strong bullish candle, enabling it to close at an all-time high level. The index continues to trade above the 20 DEMA, reflecting strong bullish momentum. However, the RSI has moved into the overbought zone, which is a cautious signal for the bulls.

• **For Monday's trading session, 57,835 will act as an initial resistance level, while on the lower end, 57,475 will act as an initial support level.**

BERGEPAINT CMP- 544.90 (Daily Chart) BUY ABOVE 545 SL 540 TGT 557.

NAUKRI CMP- 1,328.30 (Daily Chart)

SELL FUT BELOW 1325 SL 1338 TGT 1298.

STOCK'S IN NEWS

RELIANCE: Mukesh Ambani-led Reliance Industries (RIL) reported a 10% growth in its consolidated Q2 net profit at Rs 18,165 crore versus Rs 16,563 crore in the year ago period. The profit after tax (PAT) is attributable to the owners of the company. The company's revenue form operations in the quarter under review stood at Rs 2.59 lakh crore, which was up 10% YoY.

CMP- 1,416.80
IMPACT- **POSITIVE**

ICICIBANK: The country's second-largest private lender ICICI Bank reported a 5.2% year-on-year growth in profit after tax to Rs 12,359 crore for the quarter ended Q2FY26, while also posting a healthy 7.4% growth in its net interest income (NII) to Rs 21,529 crore from Rs 20,048 crore in the same quarter last year

CMP- 1,436.60
IMPACT- **POSITIVE**

HDFCBANK: India's largest private lender HDFC Bank, on Saturday, reported its second quarter results for FY26, reporting a 10.8% year-on-year (YoY) growth in its standalone net profit at Rs 18,641.28 crore, up from Rs 16,820.97 crore in the same period last year. Further, the bank's net interest income (NII) also witnessed a 4.8% YoY growth and was reported at Rs 31,550 crore, rising from Rs 30,110 crore in the second quarter of FY25.

CMP- 1,002.55
IMPACT- **POSITIVE**

ECONOMIC NEWS

- President Trump issued an ultimatum to India, threatening massive tariffs unless it significantly reduces its import of Russian crude oil. This move directly links Washington's goal of cutting Moscow's war funding to economic consequences for Indian exporters, following previous tariff hikes.

- In a generous move ahead of the festive season, the Haryana government has announced a remarkable increase in sugarcane prices for local farmers, bringing the new rate to Rs 415 per quintal. Dubbed a 'Diwali bonus', this initiative is part of a broader strategy to ensure Haryana leads the nation in sugarcane pricing.

- In a significant diplomatic effort, India and Brazil are engaging in negotiations to enhance their trade agreement, aimed at bolstering economic ties with the Mercosur bloc. Following Brazilian Vice President Geraldo Alckmin’s recent visit to India, the countries are eager to expand their trade preferences. The discussions are projected to wrap up in the next ten months.

NIFTY50 TOP GAINERS

Company	Price	Change	%Gain
Asian Paints	2,507.80	98.1	4.07
M&M	3,647.20	86.4	2.43
Max Healthcare	1,202.70	27.4	2.33
Bharti Airtel	2,012.00	44.6	2.27
ITC	412.15	7	1.73

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain
Wipro	240.9	-12.91	-5.09
Infosys	1,441.10	-30.4	-2.07
HCL Tech	1,486.20	-28.8	-1.9
Eternal	342.65	-5.2	-1.49
Tech Mahindra	1,447.60	-16.2	-1.11

NIFTY200 TOP GAINERS

Company	Price	Change	%Gain
Adani Power	165.98	8.61	5.48
Asian Paints	2,508	98.1	4.08
Bharti Hexacom	1,816	65.8	3.76
Ola Electric Mobilit	57.08	1.7	3.07
M&M Financial	301	7.7	2.63

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain
Wipro	240.9	-12.91	-5.09
YES Bank	22.25	-0.88	-3.77
Swiggy	432.15	-16.25	-3.63
Mphasis	2,694	-89.91	-3.23
Policy Bazaar	1,647	-44.1	-2.61

OPEN INTEREST GAINERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
TATAMOTORS	395.45	-1.15	-0.29%	37533.6	14.23%
POWERINDIA	17,491	-271.00	-1.53%	103.8	13.26%
WIPRO	240.01	-14.50	-5.70%	152682	12.64%
MUTHOOTFIN	3,334.40	59.20	1.81%	2845.4	12.48%
POLICYBZR	1,651.50	-45.80	-2.70%	7923.6	10.66%

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
JSWSTEEL	1,163.40	-10.20	-0.87%	39967.4	-10.18%
AUROPHARMA	1,104.20	-6.50	-0.59%	20194.3	-9.21%
DALBHARAT	2,238.90	10.70	0.48%	2279.2	-8.27%
UNITDSPR	1,364.30	2.20	0.16%	11538.8	-8.17%
ICICIBANK	1,437.10	18.10	1.28%	94945.2	-7.25%

INDEX HIGHEST OI

F&O Ban list
RBLBANK
SAMMAANCAP
-
-

Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
28/10/25	NIFTY	26,000	25,000	1.06
28/10/25	BANKNIFTY	57,000	57,000	1.18

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	1,45,392.00	1,45,978.76	-586.76	1,82,798.54	1,54,754.09	28,044.45
17-Oct-25	14,505.27	14,196.29	308.98	16,860.39	15,333.78	1,526.61
16-Oct-25	14,739.14	13,741.85	997.29	19,840.85	15,764.65	4,076.20
15-Oct-25	14,013.54	13,944.90	68.64	16,214.69	11,564.61	4,650.08
14-Oct-25	10,847.86	12,356.39	-1,508.53	16,384.50	12,723.37	3,661.13

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	211764.19	220011.57	-8247.38	272207.21	270558.72	1648.49
16-Oct-25	26699.29	26236.27	463.02	30360.04	30121.01	239.03
15-Oct-25	19949.96	18515.53	1434.43	26820.27	26652.05	168.22
14-Oct-25	17282.69	21170.24	-3887.55	27718.3	27631.51	86.79
13-Oct-25	14571.1	17072.79	-2501.69	23655.65	23473.81	181.84

TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Paints/Varnish	1.7	0.75	0.04	-3.31	5.09	-12.05
Tobacco Products	1.35	-0.05	-5.62	-3.76	6.35	-1.74
Consumer Durables	0.57	0.88	-3.99	-1.96	8.17	-11.26
Infrastructure Investment Trusts	0.44	0.27	0.22	3.23	9.91	4.02
Engineering	0.41	4.35	2.96	-3.93	10.01	-12.1

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

Result calendar for F&O stocks

23-10-2025	24-10-2025	28-10-2025	29-10-2025	30-10-2025
COLPAL	SBICARD	M&MFIN	COALINDIA	BANDHANBK
HINDUNILVR	DRREDDY		DRREDDY	CANBK
LAURUSLABS	COFORGE		COFORGE	CIPLA
				DABUR
				EXIDEIND
				ITC
				MPHASIS
				PIDILITIND
				NAVINFLUOR

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

UPCOMING ECONOMIC EVENTS

Wednesday ,October 17, 2025	Country	Event’s	Forecast		Previous
11:30	GB	CPI (YoY) (Sep)	4.0%		3.8%
10:30	US	Crude Oil Inventories			3.524M
Thursday, October 23, 2025					
18:00	US	Initial Jobless Claims	223K		218K
19:30	US	Existing Home Sales (Sep)	4.06M		4.00M
Friday, October 24, 2025					
01:00	IN	S&P Global Manufacturing PMI (Oct)			57.7
01:00	IN	S&P Global Services PMI (Oct)			60.9
07:30	IN	FX Reserves, USD			
08:30	US	Core CPI (MoM) (Sep)	0.3%		0.3%
08:30	US	CPI (YoY) (Sep)	3.1%		2.9%

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