

Nifty Futures	Level 1	Level 2	Level 3
Resistance	24,850	25,000	25,150
Support	24,680	24,540	24,400

Indices (NSE)	Close	Pts. Chg	% Chg
Nifty 50	24,773.2	32.2	0.1
Nifty Future (Sept)	24,892.7	53.1	0.2
Nifty Future (Oct)	25,007.4	61.3	0.3
Nifty Bank	54,186.9	72.4	0.1
Nifty 100	25,402.0	45.2	0.2
Nifty 500	22,878.7	49.5	0.2
NIFTY MIDCAP 100	57,361.2	286.0	0.5

Indices (BSE)	Close	Pts. Chg	% Chg
SENSEX	80,787.3	76.5	0.1
BSE 100	25,939.7	35.7	0.1
BSE 200	11,231.3	23.1	0.2
BSE All Cap	10,507.4	23.5	0.2
BSE Midcap	45,608.9	149.1	0.3
BSE SmallCap	52,910.6	158.3	0.3

Sectoral Indices	Close	Pts. Chg	% Chg
Bankex	60,550.1	49.4	0.1
Capital Goods	67,101.3	248.7	0.4
Realty	6,811.7	29.6	0.4
Power	6,551.2	9.4	0.1
Oil & Gas	25,916.1	73.6	0.3
Metal	32,279.5	114.9	0.4
CD	61,958.7	-440.8	-0.7
Auto	60,719.9	1836.8	3.1
TECK	16,730.4	-120.1	-0.7
IT	33,776.5	-272.6	-0.8
FMCG	20,668.1	-70.9	-0.3
Healthcare	44,127.1	-127.0	-0.3
India VIX	10.8	0.1	0.0

Exchange	Advance	Decline	Unchange
BSE	2,199	2,048	173
NSE	1,685	1,334	76

Volume	Current Rs (in cr)	% Chg
NSE Cash	80,859.1	-1.3
BSE Cash	7,388.3	1.0
NSE F&O	1,33,775.6	-7.6

Net Inflows/Outflows (Rs in cr)	Buy	Sell	Net
FII	8,228.5	10,398.9	-2,170.4
DII	11,080.7	8,066.4	3,014.3

## Intraday Nifty Outlook

The benchmark index opened with a gap up but witnessed selling pressure from higher levels, eventually closing flat at 24,773. The index continues to face supply near 24,850–25,000, which coincides with its 50-DMA and gap resistance zone, while 24,700 remains a crucial support. Options data indicates heavy Call writing at 24,800 and 25,000 strikes, whereas Put writers are active at 24,700, suggesting a tight rangebound setup.

## Corporate News

### HUDCO to provide ₹11,300 crore for housing and infra in Nagpur, signs MoU with NMRDA

State-owned Housing and Urban Development Corporation Limited (HUDCO) on Monday (September 8) said it signed a memorandum of understanding (MoU) with Nagpur Metropolitan Region Development Authority (NMRDA), Maharashtra, in Mumbai. The non-binding MoU aims to create a collaborative partnership between the two entities to support land acquisition, housing, and infrastructure development in the Nagpur Metropolitan Region. Under the agreement, HUDCO will explore funding up to ₹11,300 crore over five years. The funds will be used for key development projects, while HUDCO will also provide consultancy services and capacity-building initiatives to meet NMRDA's emerging needs.

Source : CNBC TV18

### Brigade Enterprises inks deal for ₹2,500-crore luxury Bengaluru residential project

Realty firm Brigade Enterprises Limited on Monday (September 8) announced the signing of a joint development agreement for a luxury residential project in East Bengaluru. The project spans approximately 10.75 acres and offers a saleable area potential of 2.5 million square feet, with an estimated gross development value (GDV) of ₹2,500 crore. The residential development aims to cater to the evolving aspirations of modern homeowners and investors. Strategically located near key commercial hubs and social infrastructure, the project is designed to offer premium living spaces that align with urban lifestyles and investment opportunities. Pavitra Shankar, Managing Director, Brigade Enterprises Ltd, said, "Bengaluru is our primary market, and this new development reflects our strategic commitment to focus on high-quality developments in premium micro markets that combine connectivity, infrastructure, and lifestyle appeal."

Source : CNBC TV18

### Strides enters into product partnership with Kenox for nasal spray

Strides Pharma Science Ltd on Monday said its Singapore-based subsidiary has entered into a strategic product development partnership with Kenox Pharmaceuticals Inc, which will strengthen the pipeline of nasal spray products across diverse therapeutic areas. Strides Pharma Global Pte, Singapore will collaborate with Kenox on the development and filing of multiple nasal spray products for the US market across diverse therapeutic indications, a joint statement said. The collaboration aims to accelerate affordable, high-quality medicines for patients in the US. However, it also mentioned that specific product details remain confidential at this stage. Kenox is a contract development and manufacturing company specialising in Orally Inhaled and Nasal Drug Products (OINDPs). Strides Pharma Science Executive Director Business Development Aditya Kumar said: "We announce this partnership with Kenox, a company that brings deep technical expertise in the OINDP space. Nasal sprays have consistently been highlighted as a key focus area for Strides, and this collaboration further builds on the solid progress we have already made in this domain."

Source : Business Standard

## Morning Wealth

Nifty Top 5 Gainers	Close	Pts. Chg	% Chg
TATAMOTORS	719.5	27.8	4.0
M&M	3,701.4	140.1	3.9
BAJAJ-AUTO	9,433.5	349.0	3.8
EICHERMOT	6,815.0	234.5	3.6
JSWSTEEL	1,101.4	28.3	2.6
Nifty Top 5 Losers	Close	Pts. Chg	% Chg
TRENT	5,315.5	-213.0	-3.9
ASIANPAINT	2,530.8	-49.1	-1.9
NESTLEIND	1,187.7	-20.8	-1.7
COALINDIA	387.1	-5.6	-1.4
DRREDDY	1,250.6	-17.5	-1.4
Int. Indices	Close	Pts. Chg	% Chg
S&P 500	6,495.2	13.7	0.2
Dow Jones	45,515.0	114.1	0.3
Nasdaq	21,798.7	98.3	0.5
FTSE 100	9,221.4	13.2	0.1
DAX	23,807.1	210.2	0.9
CAC 40	7,734.8	60.1	0.8
Nikkei 225	43,717.5	73.7	0.2
Hang Seng	26,014.0	380.1	1.5
ADR	Close	Pts. Chg	% Chg
HDFC Bank ADR	35.4	0.1	0.2
ICICI Bank ADR	31.9	0.2	0.6
Infosys ADR	16.8	0.4	2.4
Wipro ADR	2.8	0.0	0.7
Currencies	Close	Pts. Chg	% Chg
Dollar Index*	97.4	-0.5	-0.5
USD/INR	88.3	0.0	0.0
EURO/INR	103.1	0.0	0.0
USD/YEN*	147.3	-0.8	-0.6
Commodities	Close	Pts. Chg	% Chg
Gold (spot) Rs	1,08,495.0	767.0	0.7%
Silver (spot) Rs	1,25,412.0	715.0	0.6%
Crude (Brent) \$*	66.4	0.3	0.5%
Crude Oil (WTI) \$*	62.6	0.3	0.5%

\*rates as at 8.30 am

### Economy

#### India-New Zealand hold wide-ranging discussions on defence, trade during Foreign Office Consultations

India and New Zealand held the Foreign Office Consultations here in the national capital on Monday, focused on several aspects of the bilateral relationship such as defence, trade and education, the Ministry of External Affairs (MEA) said on Monday. Sharing the details in a post on X, the MEA said that the Foreign Office Consultations were led by Secretary (South) Neena Malhotra and Deputy Secretary (Asia Group & Americas) Grahame Morton. MEA underscored that the consultations reaffirmed the commitment to deepen ties and continue with the momentum of high-level exchanges. The visit comes after, in August this year, Union Minister of State for Defence, Sanjay Seth, met New Zealand Defence Ministry's Head of International Branch, Kathleen Pearce, in New Delhi, reaffirming commitment to deepen cooperation across key strategic domains. The Second Round of negotiations for the India-New Zealand Free Trade Agreement (FTA) concluded successfully on July 25 in New Delhi, further advancing the shared objective of strengthening bilateral trade and economic partnerships. According to a previous statement by the Ministry of Commerce, the Third Round of negotiations is scheduled to be held in New Zealand in September 2025. The intersessional virtual meetings will maintain the forward trajectory set in the second round.

Source : The Economic Times

### International News

#### China Exports Growth Softens More Than Forecast

China's exports growth moderated more than expected in August as frontloading gains from the U.S. started to fade but demand from Europe and Asean countries picked up strongly. Exports grew 4.4 percent year-on-year in August, which was slower than the 7.2 percent rise in July, the customs office reported Monday. This was also weaker than forecast of 5.0 percent. Likewise, imports advanced 1.3 percent on a yearly basis, slower than the 4.1 percent rise in July. Imports were expected to climb 3.0 percent. The trade surplus rose to \$102.3 billion from \$98.24 billion in July. The expected level was \$99.4 billion. Exports to the U.S. continued to decline in August, while shipments to Europe and Asean countries showed increases. Shipments to the U.S. were down 33.1 percent from a year ago. Meanwhile, imports from the U.S. decreased about 16 percent. In August, China and the U.S. extended their trade truce for another 90 days, until November 10. Currently, the U.S. levies 30 percent tariff on Chinese imports and China retained a 10 percent tariff on US goods. The extension has given more time for further negotiations. Earlier this year, U.S. President Donald Trump had threatened to impose 145 percent tariffs on China and the latter has retaliated with 125 percent levies on US goods.

Source : RTT News

### Major Bulk Deal (NSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				

### Major Bulk Deal (BSE)

Scrip Name	Qty	Type	Client Name	Trade Price
NO MAJOR BULK DEALS				



## Morning Wealth

## EVENTS CALENDAR

Monday 08-Sep-2025	Tuesday 09-Sep-2025	Wednesday 10-Sep-2025	Thursday 11-Sep-2025	Friday 12-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global– US Consumer Credit (Jul)	Global– China CPI (YoY) (Aug)	Global– US PPI (MoM) (Aug)	Global– Euro ECB Interest Rate Decision (Sep), US Core CPI (MoM) (Aug)	Global– Japan Industrial Production (MoM) (Jul), EUR GDP
15-Sep-2025	16-Sep-2025	17-Sep-2025	18-Sep-2025	19-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic — WPI Food, Fuel inflation	Economic —	Economic—	Economic —	Economic —
Global– EUR Trade Balance (Jul)	Global– EUR Unemployment Rate (Jul), US Core Retail Sales (MoM) (Aug)	Global– EUR CPI Aug, US Fed interest rate cut decision	Global– BOE interest rate decision, BOJ Interest rate decision	Global–
20-Sep-2025	21-Sep-2025	22-Sep-2025	23-Sep-2025	24-Sep-2025
Results—	Results—	Results—	Results—	Results—
Economic —	Economic —	Economic—	Economic —	Economic —
Global–	Global–	Global–	Global– US S&P Global Manufacturing PMI (Sep), S&P Global Manufacturing PMI (Sep), S&P Global Services PMI (Sep), US Existing Home Sales (Aug)	Global– US New Home sales (MOM) (Aug), US GDP (QOQ) (Q2), US Core Durable Goods Orders (Aug)

(Source: Investing.com and BSE)

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