

24 October 2025

Friday

PRE-MARKET PRO

Premium Plus

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“Rule No. 1: Never lose money. Rule No. 2: Never forget Rule No. 1”

- Warren Buffett

▲ GIFT NIFTY	● 26,026.50	66.50	0.26%
▲ US DOLLAR INDEX	99.02	0.09	0.09%
▼ USA VIX	17.30	-1.30	-6.99%

Indian Market

▲ NIFTY	25,077.65	183.40	0.74%
▲ SENSEX	84,556.40	130.05	0.15%
▲ BANK NIFTY	58,078.05	70.85	0.12%
▲ NIFTY FIN SERVICE	27,556.65	19.80	0.07%

USA Market

▲ NASDAQ - 100	25,097.42	218.41	0.88%
▲ DOW JONES	46,734.61	144.20	0.31%
▲ S&P	6,738.44	39.04	0.58%
▲ S&P FUTURE	● 6,795.25	20.25	0.30%
▲ DOW JONES FUTURE	● 47,014.00	92.00	0.20%
▲ NASDAQ - 100 FUTURE	● 25,362.00	108.25	0.43%

Other Markets

▲ NIKKEI 225	● JAPAN	49,299.65	658.04	1.35%
▲ KOSPI	● SOUTH KOREA	3,941.59	96.03	2.50%
▲ SSE	● CHINA	3,946.34	23.93	0.61%
▲ HANG SENG	● CHINA	26,130.35	162.69	0.63%
▼ ASX 200	● AUSTRALIA	9,019.00	-13.80	-0.15%
▲ DAX	GERMANY	24,207.79	56.66	0.23%
▲ EURONEXT	EUROPE	1,714.21	9.70	0.57%
▲ FTSE 100	UK	9,578.57	63.57	0.67%
▲ CAC 40	FRANCE	8,225.78	18.91	0.23%
▲ IBOVESPA	BRAZIL	1,45,720.98	848.19	0.59%
	● Live Market			

Global Currency Market

▲ USD / INR	88.81	0.0970	0.11%
▼ EUR / INR	103.59	-0.5948	-0.57%
▼ EUR / USD	1.17	-0.0079	-0.68%
▲ BTC / USD	1,24,089.09	1,014.41	0.83%
▲ BTC / INR	1,10,22,959.00	90,111.00	0.83%
▲ ETH / USD	4,561.65	28.94	0.64%

Global Commodity Market

▲ CRUDE OIL	61.90 \$	1.02	1.71%
▲ BRENT CRUDE	65.57 \$	1.04	1.67%
▲ NATURAL GAS	3.45 \$	0.13	3.79%
▲ GOLD	3,964.30 \$	55.40	1.45%
▲ SILVER	48.36 \$	0.40	0.90%
▼ COPPER	5.05 \$	-0.059	-1.12%

Local Commodity Market

City Name	10g Gold	1 Kg Silver	Petrol	Diesel
AHMEDABAD	₹ 1,23,940	₹ 1,49,210	₹ 94.48	₹ 90.16
BANGALORE	₹ 1,23,870	₹ 1,49,140	₹ 102.92	₹ 90.99
CHENNAI	₹ 1,24,140	₹ 1,49,460	₹ 100.80	₹ 92.39
DELHI	₹ 1,23,560	₹ 1,48,770	₹ 94.70	₹ 87.51
HYDERABAD	₹ 1,23,970	₹ 1,49,260	₹ 107.46	₹ 95.70
JAIPUR	₹ 1,23,670	₹ 1,49,010	₹ 104.72	₹ 90.21
KOLKATA	₹ 1,23,610	₹ 1,48,830	₹ 105.41	₹ 92.02
MUMBAI	₹ 1,23,780	₹ 1,49,030	₹ 103.50	₹ 90.03
RAJKOT	₹ 1,23,940	₹ 1,49,230	₹ 94.85	₹ 90.87
TRISSUR	₹ 1,24,070	₹ 1,49,480	₹ 106.17	₹ 94.84

Market Mood Index And VIX India

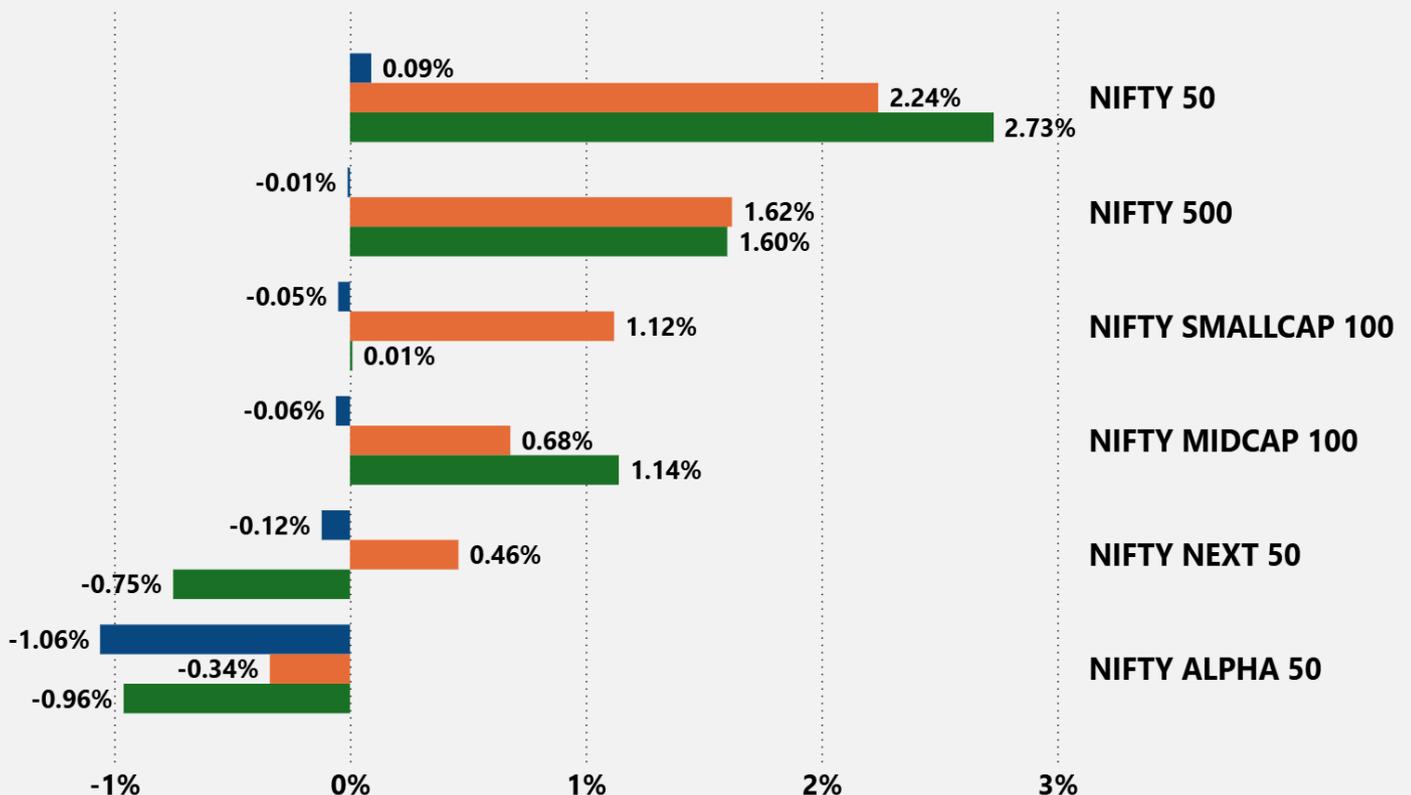


VIX High VIX Signifies High Volatility In The Market

MMI	00 - 25	25 - 50	50 - 75	75 - 100	Extream Fear	Fear	Greed	Extream Greed	Very Good Time To Buy	Good Time To Buy	Hold - Not A Good Time To Add Positions	Bad Time To Buy, Could Be A Right Time To Sell

Nifty Major Indexes Performance

● 1D Change % ● 1W Change % ● 1M Change %



Market Snapshot

Top Gainers

	Nifty 500
▲ SCI	7.93%
▲ BSOFT	7.71%
▲ VTL	7.14%
▲ IDEA	5.78%
▲ KPRMILL	5.78%
▲ NAUKRI	4.77%

Top Losers

	Nifty 500
▼ GODFRYPHLP	-6.91%
▼ TATAINVEST	-5.49%
▼ FORCEMOT	-5.08%
▼ POONAWALLA	-4.90%
▼ GVT&D	-4.80%
▼ HINDCOPPER	-4.52%

Recovery From Intraday Low

	Nifty 500
▲ SCI	7.93%
▲ BSOFT	7.71%
▲ IDEA	5.78%
▲ MASTEK	5.00%
▲ IEX	3.87%
▲ NAUKRI	4.77%

Fall From Intraday High

	Nifty 500
▼ TATAINVEST	-5.49%
▼ GODFRYPHLP	-6.91%
▼ GVT&D	-4.80%
▼ POONAWALLA	-4.91%
▼ ELGIEQUIP	-1.07%
▼ FORTIS	-4.42%

52 Week High

	Nifty 500
▲ MARUTI	-0.02%
▲ APOLLOHOSP	-0.54%
▲ HEROMOTOCO	-1.03%
▲ CEATLTD	0.30%
▲ LT	0.78%
▲ TITAN	1.16%
▲ TVSMOTOR	-1.67%

52 Week Low

	Nifty 500
-	-
-	-
-	-
-	-
-	-
-	-
-	-

Most Deliverable	Nifty 500
▲ AXISBANK	69.99%
▲ HCLTECH	68.00%
▲ COALINDIA	66.41%
▲ ITC	65.64%
▲ BEL	65.35%
▲ M&M	64.43%

(Percentage Delivered)

Fall From 52w High	Nifty 500
▼ ABFRL	74.33%
▼ TEJASNET	63.04%
▼ PRAJIND	60.84%
▼ SIEMENS	60.80%
▼ SKFINDIA	58.24%
▼ MANYAVAR	54.52%

Distance From 52w high)

Long Buildup	OI Chg%
▲ AXISBANK	53.10%
▲ ADANIENSOL	51.10%
▲ PHOENIXLTD	33.80%
▲ VEDL	33.80%
▲ ONGC	32.50%
▲ KOTAKBANK	29.80%

Short Buildup	OI Chg%
▼ ETERNAL	42.80%
▼ TVSMOTOR	32.60%
▼ ULTRACEMCO	31.10%
▼ HINDPETRO	27.40%
▼ BHARTIARTL	27.20%
▼ IIFL	25.40%

20% Band hitter

▲ BHAGERIA	20.00%
▲ SIKKO	20.00%
▲ COASTCORP	19.98%
▲ FCSSOFT	19.91%

10% Band hitter

▲ ARTNIRMAN	10.00%
▲ TCIFINANCE	9.97%

F&O Stocks Ban list**Securities In Ban**

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Possible Entrants

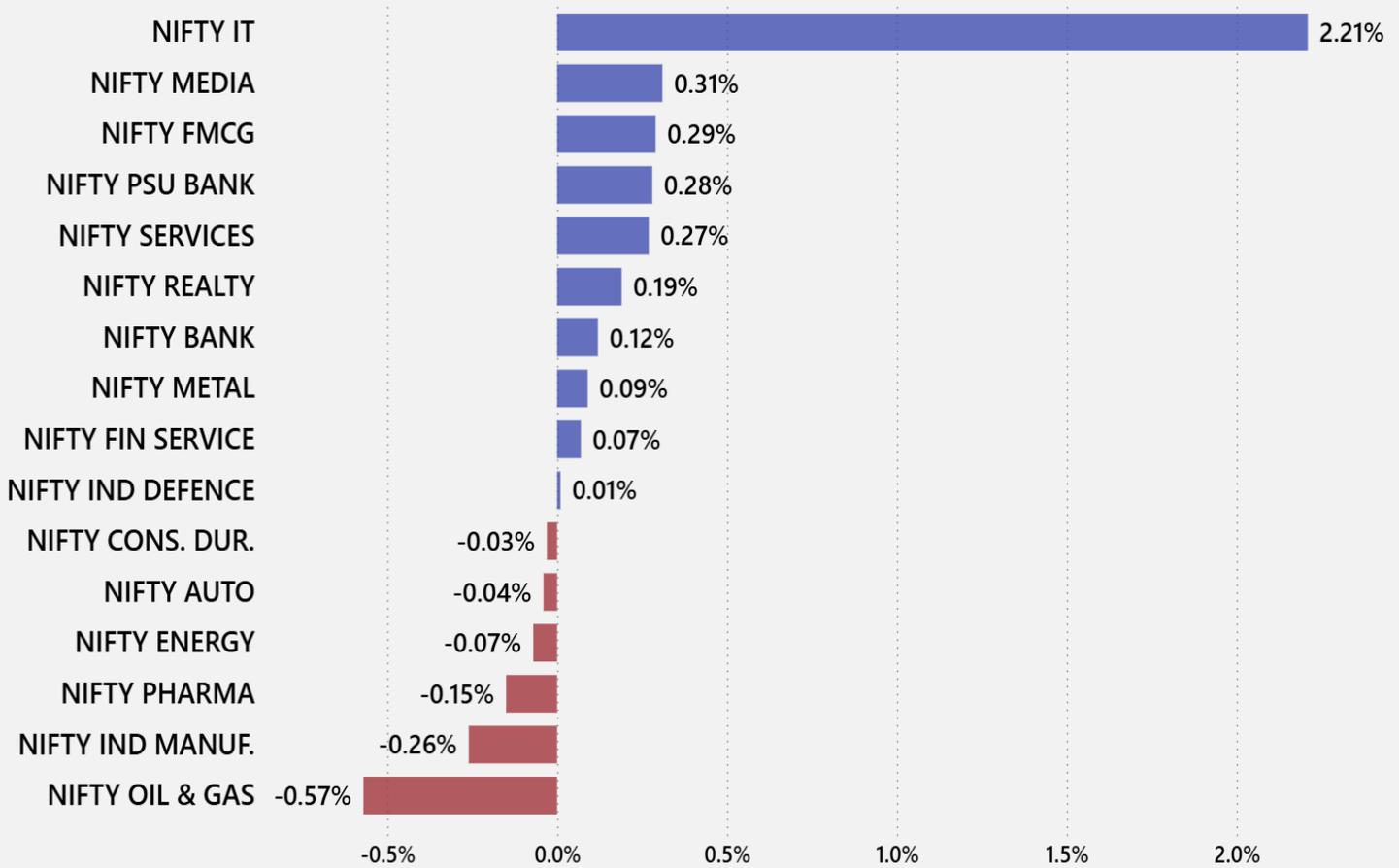
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Possible Exits

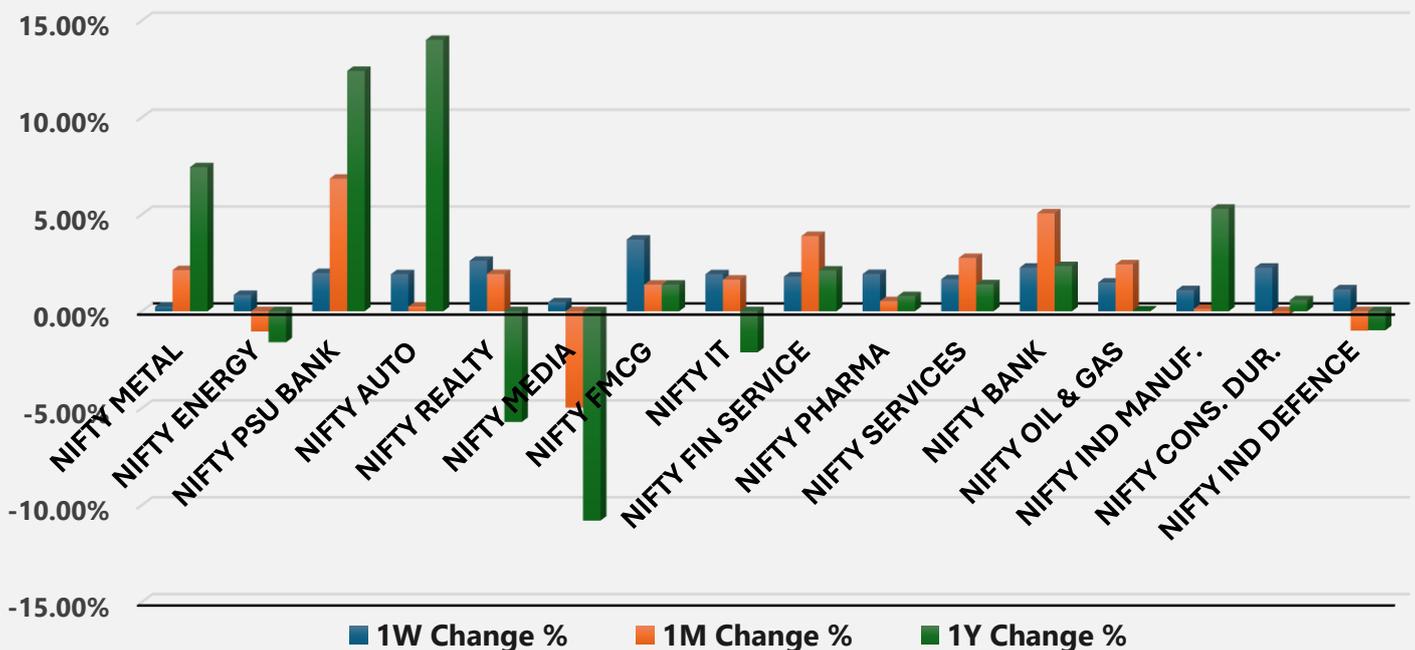
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Nifty Sector-wise Performance

1 Day Change %



1 Week / 1 Month / 1 Year change %



Morning Brief

1. Gift Nifty Opens Up At 0.11% Or 27.50 Points At 26,039.50.
2. Asian stocks set to rise on eased US-China tensions and strong Wall Street earnings. Treasuries fall, oil stabilizes, markets await US CPI and Fed rate decision.
3. U.S. Natural Gas Storage Reached 87 Billion Cubic Feet, Higher Than Last Week's 80 Billion and The Expected 83 Billion.
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5. Global Crude Steel Production Decreased by 1.6% To 141.8 Million Tons in September 2025 Compared To Last Year
6. US Existing Home Sales Increased to 4.06 Million Units in September, Meeting the Expected Rate of 4.06 Million Units
7. CRISIL Predicts US Tariffs May Reduce Indian Leather Revenue By Up To 12% In FY26.
8. India May Significantly Reduce Russian Oil Imports Because of U.S. Sanctions.
9. RBI Unveils Draft Circular For Unique Transaction Identifier In OTC Derivative Deals In India, Aiming For Implementation By April 01, 2026
10. Defence Ministry set to approve military deals over ₹80,000 crore, including ₹33,000 crore for four landing platform docks.
11. India 10-Year Benchmark Government Bond Yield Drops to 6.4955% from 6.5040% Previously.
12. Donald Trump alleges that China is using Venezuela to smuggle fentanyl, and he plans to ask President Xi Jinping about fentanyl during their next meeting.
13. White house says trump to meet south korea leader on Wednesday.
14. White house says trump to meet new japanese prime minister on tuesday and xi jinping on Thursday.

Nifty 50 Summary



Nifty 50 Stocks
Advanced / Declined : 27 Advances 23 Declines

- Nifty 50 remains in a short-term downtrend after peaking near 25,230, with key support at 25,020 and resistance near 25,180; heavy volumes during declines signal selling pressure.
- During Thursday's session, Nifty touched a fresh 52-week high at 26,104.2 before slipping to 25,850, trading within a 25,850–26,150 range.
- Immediate levels are resistance at 26,107 and supports at 25,826, 25,634, and 25,437.
- Despite strong daily and weekly uptrend with Nifty above major EMAs, technicals show overbought conditions, hinting at a possible short-term correction before further gains. Volume spikes were noted during declines indicating selling pressure.
- Investor sentiment remains cautious as volatility increases, with traders closely tracking global cues and upcoming earnings for near-term direction.

Top 3 Nifty Pullers

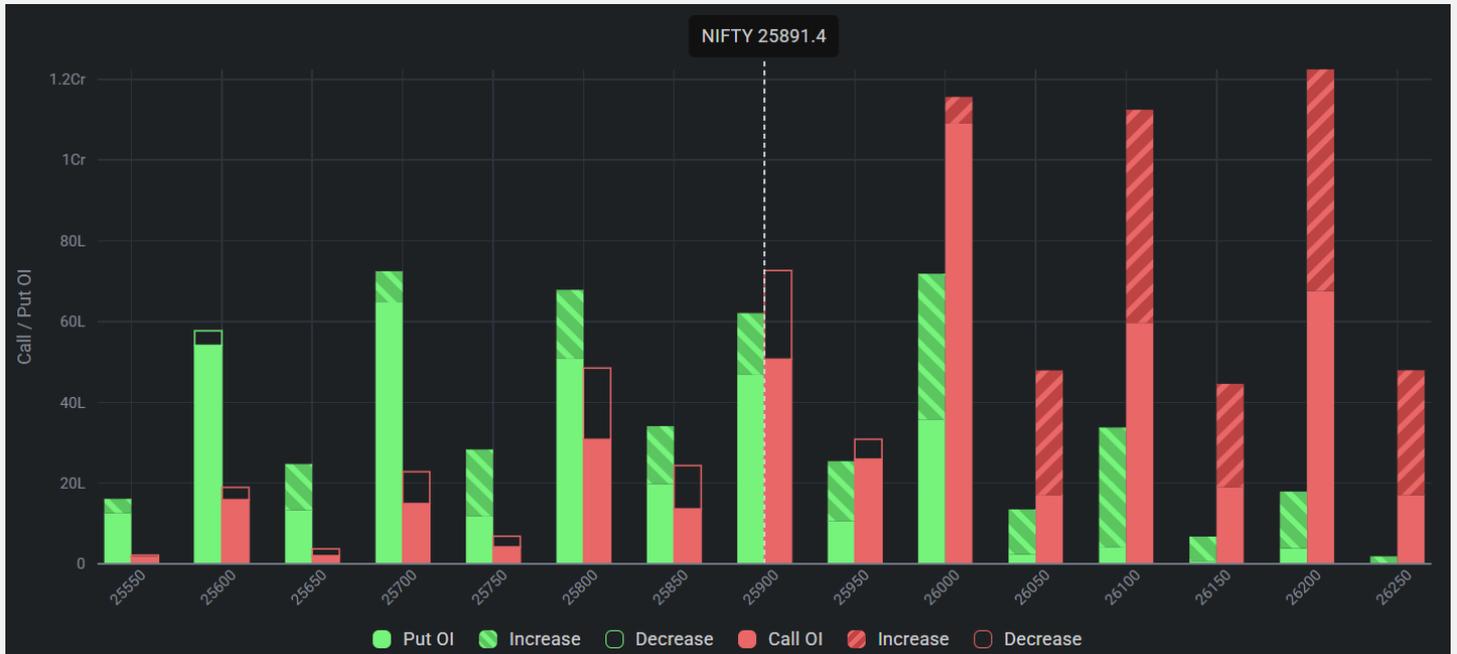
▲ INFY	1,528.5	3.81%
▲ TCS	3,073.2	2.21%
▲ AXISBANK	1,258.8	1.74%

Top 3 Nifty Draggers

▼ ICICIBANK	1,363.7	-1.32%
▼ RELIANCE	1,448.4	-1.15%
▼ BHARTIARTL	2,007.9	-1.74%

Nifty Option Chain Analysis

Weekly Option Chain



High Call OI = potential resistance; High Put OI = potential support
 Increasing Call OI = bearish; Decreasing Call OI = bullish
 Increasing Put OI = bullish; Decreasing Put OI = bearish

Call OI Change : +1.3 Cr
Put OI Change : +1.96 Cr

Historical Put / Call Ratio (PCR)



Stocks In News

Bullish News

1. **Ola Electric:** To Explore Fundraising Options Through Equity Or Other Securities For Expansion Goals. **(23 Oct 08:28 AM)**
2. **Insolation Energy:** Company Partners with PRGE Green Infra Pvt Ltd for Solar Power Plant Development. **(23 Oct 08:29 AM)**
3. **Biocon:** Biocon Biologics Gets Health Canada Approval For Yesintek And Yesintek I.V. (Ustekinumab), A Biosimilar Of Stelara. **(23 Oct 08:30 AM)**
4. **Can Fin Homes:** Predicts 2.75% Spread And 3.75% NIM Ahead; Lower Credit Costs For FY26 Than Expected 15 BPS; Aiming For 15% AUM Growth From FY27. **(23 Oct 08:54 AM)**
5. **Titan:** UBS upgrades to 'Buy' from 'Neutral' on Titan with Price Target of Rs 4700. **(23 Oct 08:57 AM)**
6. **Tata Steel:** Nomura initiates 'Buy' on TataSteel with Price Target of Rs 215. **(23 Oct 08:56 AM)**
7. **Vikram Solar:** Secures 148.9 MW Solar Modules Order From Sunsure Energy For Use In Maharashtra And Uttar Pradesh To Aid India's Clean Energy Goals. **(23 Oct 09:22 AM)**
8. **PACE Digitek:** Company Secures ₹1159.31 Crores Order From Solar Energy Corporation Of India For 600 MW/1200 MWh BESS Supply, With 10 Years Of Service And Maintenance; Completion Aimed Within 16 Months. **(23 Oct 12:36 PM)**
9. **Intellect Design Arena:** NCBA's Launches Connect Plus, East Africa's First Cloud-Based Corporate Banking Platform Powered By :Intellect, Boosting Transaction Processing, Security, And User Experience For Corporate Clients. **(23 Oct 02:20 PM)**

10. **Syrma SGS Technology:** To Buy 49% Share In Ksolare Energy For ₹83.3 Crore; Total Deal Worth ₹170 Crore With Pel Holding 51% Share; Move Aimed At Expanding Residential Solar Inverter Market. **(23 Oct 03:39 PM)**
11. **Premier Energies:** Approves Purchase Of 51% Stake In Transcon Ind Limited For ₹500.3 Crores; Transcon Will Become A Subsidiary, Aiming To Expand Into Power Transformer Manufacturing. **(23 Oct 03:21 PM)**
12. **Hero Motocorp:** Enters UK Market With Motogb Partnership, Introduces Euro 5+ Hunk 440 As It Expands Globally To 51 Nations. **(23 Oct 04:56 PM)**
13. **Caplin Point Laboratories:** Gets USFDA Approval For Nicardipine Hydrochloride Injection And Acquires Four Approved ANDA Products Worth About \$121 Million. **(23 Oct 02:49 PM)**

Neutral News

1. **Urban Company:** MorganStanley's call on Urban Company: Initiate underweight call, target price at ₹117/sh. **(23 Oct 08:57 AM)**
2. **Insolation Energy:** Company Board Approves Move to Main BSE and NSE; Allows Borrowing and Asset Charges Up to ₹5,000 Crores; Postal Ballot Notice Issued. **(23 Oct 06:50 PM)**
3. **Protean eGov Technologies:** Gaurav Ramdev Steps Down As CGMO Starting October 17, 2025. **(23 Oct 11:17 AM)**
4. **Mufin Green Finance:** Sets Approved Plan To Issue Secured Non-Convertible Debentures Worth ₹50 Crore Privately; Meeting Took Place On October 23, 2025. **(23 Oct 10:53 AM)**
5. **Glenmark Pharmaceuticals:** Co Will Introduce Ropivacaine Hydrochloride Injection USP In November 2025, Competing With Naropin[®], Which Made About \$20.9 Million Annually. **(23 Oct 09:15 AM)**

6. **JSW Steel:** Co CEO Announces Plans to Begin Odisha Steel Plant Construction Within a Year, As Company Searches for New Iron Ore Mines to Satisfy Demand. **(23 Oct 09:40 AM)**
7. **Kakatiya Cement Sugar & Industries Limited:** High Court Allows Co To Continue Mining Operations Until November 19, 2025; Permit Granted For Moving 69,000 MT Of Limestone. **(23 Oct 02:38 PM)**
8. **Kaynes Technology India:** Subsidiary Signs Deal to Buy 7% Share in Sensonic GmbH From Frauscher Sensor Technology Group for One Euro; No Changes in Management or Control. **(23 Oct 06:51 PM)**
9. **Laurus Labs:** Reports Over 85% Growth In Capital Expenditure For API And CDMO Portfolio Backed By Integrated Drug Product Strategy. **(23 Oct 03:26 PM)**
10. **Hexaware Technologies:** Names Eravi Gopan as President and Global Head for High Tech, Products, and Platforms to Enhance AI Adoption and Client Success Initiatives. **(23 Oct 06:52 PM)**

Bearish News

1. **Tata Motors:** S&P Changes Jaguar Land Rover's Outlook to Negative Due to Rising Challenges; 'BBB-' Ratings Remain Unchanged. **(23 Oct 08:34 PM)**
2. **Welspun Enterprises:** Faces ₹9 Crore Tax And Penalty Order From Tamil Nadu State GST Authority For FY 2018-19; Plans To Appeal The Decision. **(23 Oct 08:03 PM)**
3. **Himatsingka Seide:** Company Gets Approval to Issue Shares and Securities Worth 5 Billion Rupees. **(23 Oct 08:28 PM)**

(The Mentioned Date And Time Indicate When The News Was First Announced.)

Quarterly Results Summary

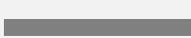
Declared

Results

226 / 2753

 Positive

 Negative

 Pending



YoY Growth

Sales YoY 3.03%

Profit YoY 7.75%



QoQ Growth

Sales QoQ -2.75%

Profit QoQ -0.48%

Upcoming Results Announcements - Nifty 500

Stock Name	Date	CMP	EPS TTM	PE TTM
SBILIFE	24-Oct	885.0	24.8	74.2
DRREDDY	24-Oct	3,416.0	68.1	18.9
SBICARD	24-Oct	14,896.0	19.7	47.5
COFORGE	24-Oct	1,220.0	29.8	58.5
ABSLAMC	24-Oct	3,674.0	33.7	25.8
ECLERX	24-Oct	2,442.0	119.9	37.0
LATENTVIEW	24-Oct	402.4	9.0	48.0
KOTAKBANK	25-Oct	591.0	96.3	22.8
ZENTEC	25-Oct	1,505.0	27.8	50.3
IOC	27-Oct	45,760.0	12.0	12.9
ADANIENSOL	27-Oct	364.2	20.0	46.9
INDUSTOWER	27-Oct	189.8	36.9	9.8
SRF	27-Oct	436.3	48.3	65.2
SUPREMEIND	27-Oct	3,416.0	70.1	59.8
SONACOMS	27-Oct	3,417.0	9.4	49.2
SUMICHEM	27-Oct	3,418.0	11.2	47.5
PNBHOUSING	27-Oct	3,419.0	78.2	11.2

Upcoming Dividend, Bonus & Splits - Nifty 500

TICKER	Event	Ex Date	Event Details	LTP
IRFC	Dividend	24 Oct' 25	₹ 1.05 Per Share	258.2
KAJARIACER	Dividend	24 Oct' 25	₹ 8 Per Share	1964.6
DALBHARAT	Dividend	24 Oct' 25	₹ 4 Per Share	444.3
LTIM	Dividend	24 Oct' 25	₹ 22 Per Share	638.4
WAAREEENER	Dividend	24 Oct' 25	₹ 2 Per Share	10395.0
CYIENT	Dividend	24 Oct' 25	₹ 16 Per Share	880.3
THYROCARE	Dividend	24 Oct' 25	₹ 7 Per Share	1021.1
INFY	Dividend	27 Oct' 25	₹ 23 Per Share	156.1
CRISIL	Dividend	27 Oct' 25	₹ 16 Per Share	340.7
PCBL	Dividend	27 Oct' 25	₹ 6 Per Share	776.3
CESC	Dividend	27 Oct' 25	₹ 6 Per Share	602.5
PCBL	Dividend	27 Oct' 25	₹ 6 Per Share	191.5
CRISIL	Dividend	27 Oct' 25	₹ 16 Per Share	1008.6
INFY	Dividend	27 Oct' 25	₹ 23 Per Share	43.8
BEML	Splits	03 Nov' 25	Ratio: 2:1	80.7

FII's Activity

DATE	Gross Purchase (In Cr.)	Gross Sales (In Cr.)	Net Purchase / Sales
Yesterday	20,477.8	21,643.7	-1,165.9
21-Oct	622.4	525.7	96.7
20-Oct	11,786.3	10,995.9	790.4
Last 7 Days	47,391.8	47,361.6	30.2
Last 30 Days	2,63,572.4	2,86,256.5	-22,684.2
Year 2025 YTD	28,08,485.1	30,61,572.8	-2,53,087.8

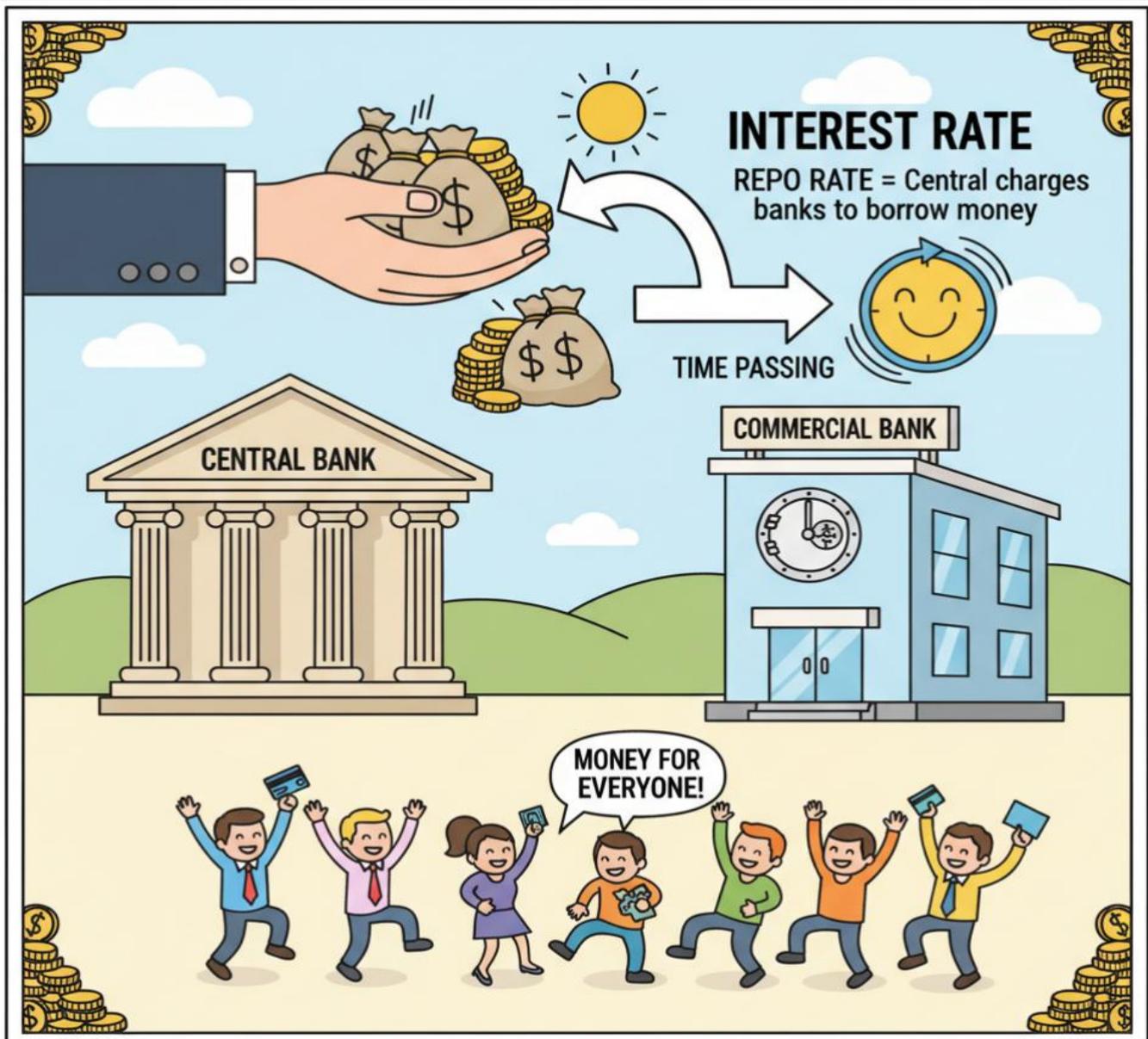
DII's Activity

DATE	Gross Purchase (In Cr.)	Gross Sales (In Cr.)	Net Purchase / Sales
Yesterday	19,247.9	15,354.2	3,893.7
21-Oct	324.1	931.1	-607.0
20-Oct	15,690.4	13,204.9	2,485.5
Last 7 Days	52,122.8	44,824.0	7,298.8
Last 30 Days	3,34,707.1	2,76,454.1	58,253.0
Year 2025 YTD	29,87,787.3	23,61,366.0	6,12,503.3

Learning Point Of The Week

Repo Rate

- The repo rate is the interest rate set by the Central Bank.
- It is the cost banks pay when they borrow money from the Central Bank for a short time.
- Banks use this money to give loans to people and businesses.
- If the repo rate is low, banks can borrow cheaply and lend more.
- If the repo rate is high, borrowing is expensive, so banks lend less.
- This helps control how much money is in the economy and keeps prices steady.
- Think of the repo rate as a short-term loan fee from the Central Bank to keep the economy balanced.



Key Terms, Made Simple

- ❖ **US DOLLAR INDEX** : The US Dollar Index is a single number that shows how strong or weak the US dollar is compared to a fixed basket of major currencies like the euro, yen, and pound.
- ❖ **VIX** : The USA VIX (CBOE Volatility Index) is a single number that shows how much volatility the market expects for the S&P 500 over the next 30 days, often called the fear gauge.
- ❖ **LONG BUILDUP** : Long buildup means price is rising along with open interest, showing traders are adding new long positions and the sentiment is bullish.
- ❖ **SHORT BUILDUP** : Short buildup means price is falling while open interest rises, showing new short positions are being added and sentiment is bearish.
- ❖ **MWPL** : MWPL (Market-Wide Position Limit) is the maximum open interest allowed in a stock's F&O contracts, and if total OI crosses 95% of this limit the stock enters the F&O ban until OI falls below 80%.
- ❖ **NIFTY PULLERS & DRAGGERS** : Nifty pullers and draggers are the stocks that contribute the most points up or down to the Nifty's move on a given day, with pullers lifting the index and draggers weighing it down.
- ❖ **PUT / CALL RATIO %** : Put/Call Ratio (%) is the share of put options versus call options, calculated as $(\text{puts} \div \text{calls}) \times 100$ to show sentiment—higher means more bearish positioning.
- ❖ **EPS TTM** : Earnings per share calculated over the last 12 consecutive months, i.e., the sum of EPS from the most recent four quarters.
- ❖ **PE TTM** : PE TTM is the current share price divided by earnings per share from the last four quarters, showing how much investors pay for each rupee of recent earnings.
- ❖ **Ex date** : The cutoff after which new buyers won't receive the announced cash dividend or cash bonus or split benefits.

Contact Us At

- Email ID - premarketpro.in@gmail.com
- Phone No – 8866747762

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Indemnity: You agree to indemnify and hold harmless PremarketPro, its officers, and employees from claims arising out of your use or misuse of the Service or breach of these terms.

Compliance: You are responsible for complying with all applicable laws, regulations, and exchange rules in your jurisdiction.

Governing Law and Dispute Resolution: These Terms are governed by the laws of India. Exclusive jurisdiction lies with the courts of Gujarat, India.

Privacy: Your privacy is our priority. We collect minimal data necessary to provide the Service, process payments, and prevent abuse.