

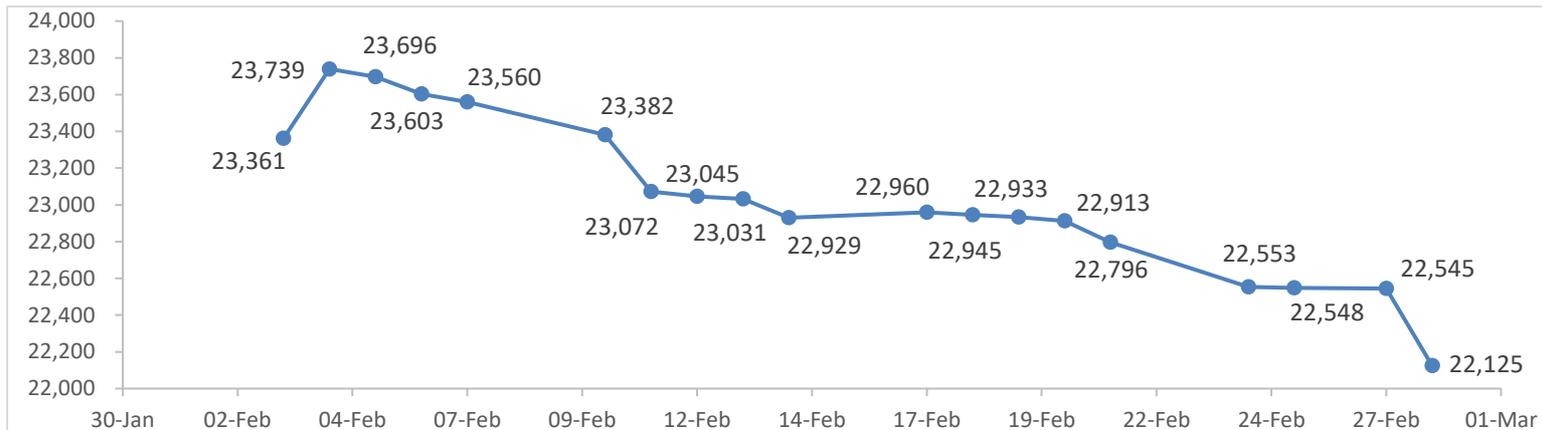
Nifty 50

22,124.7 **1383.7**
(-5.89%)

52 Week High: 26,277.4

52 Week Low: 21,281.4

Resistance		Support	
R1	22,358.6	S1	22,094.7
R2	22,440.2	S2	22,013.1
R3	22,572.1	S3	21,881.1



Sectorial Indices	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
Nifty Auto	22,868	20,499	-10.4%
Nifty PSU Bank	6,317	5,652	-10.5%
Nifty Pharma	21,439	19,814	-7.6%
Nifty IT	42,663	37,318	-12.5%
Nifty FMCG	56,692	50,689	-10.6%
Nifty Metal	8,400	8,219	-2.1%
Nifty Fin Serv	23,221	23,029	-0.8%
Nifty Cons	37,591	34,459	-8.3%

Global Indices	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
Dow Jones	44,545	43,240	-2.9%
Nasdaq	19,627	18,544	-5.5%
FTSE	8,674	8,756	0.9%
Hang Seng	20,225	22,941	13.4%
USD/INR	87	87	1.0%
GBP/INR	107	110	2.5%

Net Flow	Amount (Rs Cr)	Index	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
FII	-58,988	SENSEX	77,501	73,198	-5.6%
DII	64,853	NIFTY 50	23,508	22,125	-5.9%
MF Equity	36,163	BANK NIFTY	49,587	48,345	-2.5%
MF Debt	-49,263				

Top Gainers	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
SHRIRAMFIN	544	617	13.5%
BAJAJFINSV	1,736	1,872	7.8%
HINDALCO	594	634	6.7%
TATASTEEL	135	137	1.9%
JSWSTEEL	945	951	0.6%

Top Losers	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
TRENT	5,753	4,852	-15.7%
TCS	4,112	3,483	-15.3%
HEROMOTOCO	4,339	3,681	-15.2%
M&M	2,990	2,585	-13.5%
TITAN	3,490	3,077	-11.8%

Commodities	Prev. Close (31-Jan'24)	Close (28-Feb'25)	% Change (1M)
Gold	82,233	84,219	2.4%
Silver	93,446	94,328	0.9%
Crude (WTI)	73	70	-3.8%

Contact us :

+91 22 6932 1000

+91 97 6932 1000

www.endovia.in



Diamond Business Partner
Authorized Person

Motilal Oswal Financial Services Ltd.

Reach us :

809, Neelkanth Corporate Park,
Kiroli Road, Vidyavihar (West)
Mumbai-400 086

Budget 2025 – A vision for Viksit Bharat:

The Union Budget 2025-26 focused on economic growth, tax relief, and infrastructure development. Key highlights include income tax relief, raising the non-taxable income limit to ₹12.75 lakh for salaried individuals, boosting disposable income. A ₹10 lakh crore asset monetization plan was launched to reinvest in infrastructure. Power sector reforms introduced incentives for distribution improvements and additional borrowing for states. States received ₹1.5 lakh crore as 50-year interest-free loans for capital projects. The fiscal deficit target was lowered to 5.3% of GDP, improving investor confidence.

Trump Announces Tariffs on Canada, Mexico, and China:

President Donald Trump has announced the implementation of new tariffs aimed at addressing issues related to drug trafficking and trade imbalances. Effective March 4, 2025, the U.S. will impose a 25% tariff on imports from Canada and Mexico, and an additional 10% tariff on imports from China, raising the total tariff on Chinese goods to 20%. Notably, Canadian energy exports to the U.S. will face a reduced tariff rate of 10%.pressure on yields.

Nifty, Sensex declines for the 5th consecutive month:

February was a punishing month for Indian equities, with the Sensex plunging more than 4,000 points, reflecting a 5% loss in percentage terms. The total market capitalization of BSE-listed companies shrank by over Rs 40 lakh crore in just one month. The Nifty also endured its longest losing streak since its inception in 1996, marking its fifth consecutive month of declines. Since reaching their peak in late September, both the Nifty and Sensex have dropped around 15%, with broader market indices experiencing even sharper corrections.

UltraTech Cement Expands and Acquires Kesoram Industries:

UltraTech Cement, India's largest cement manufacturer, is expanding into the wires and cables sector with a Rs 1,800 crore investment in a new facility. Additionally, UltraTech has acquired Kesoram Industries through a share swap deal with a ratio of 1:52, effective March 1, 2025. This strategic move aims to strengthen UltraTech's market presence and diversify its business portfolio, though it has led to market uncertainty and a decline in share prices for both companies.

Tuhin Kanta Pandey Takes the Helm as SEBI Chairman:

Tuhin Kanta Pandey, the current Finance Secretary, has been appointed as the new SEBI Chairman, effective March 1, 2025, succeeding Madhabi Puri Buch. With experience in key economic reforms, including Air India's sale and LIC's listing, Pandey takes over during a period of market volatility and foreign investor outflows. His tenure is expected to focus on strengthening regulatory frameworks, stabilizing markets, and boosting investor confidence.

IPO Update :-

Company Name	IPO Date (Feb'25)	Market Response
Ajax Engineering	10 Feb – 12 Feb	6.06x oversubscribed
Hexaware Technologies	12 Feb – 14 Feb	2.79x oversubscribed
Quality Power	14 Feb – 18 Feb	1.29x oversubscribed

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