



premarketpulse.com

Fri, 14 Feb

2025

Fear & Greed Index



39.1

Fear 🙄

Definition

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- Extreme Fear (<30): Good time to open positions
- Fear (30-50): Wait for market direction
- Greed (50-70): Be cautious with new positions
- Extreme Greed (>70): Avoid opening positions

Weekly Change

44.5 → 39.1

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"The longer you're not taking action the more money you're losing."

@ Carrie Wilkerson

Overview

As of Today at 9:14 am

▼	GIFT Nifty	23,268.0	-123.54	-2.97%
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Asian Market

▲	Hang Seng	Hong Kong	22346.05	+531.68	+2.44%
▼	Nikkei 225	Japan	39287.3	-174.17	-0.44%
▲	KOSPI	South Korea	2596.46	+13.29	+0.51%
▲	ASX 200	Australia	8566.4	26.4	+0.31%

Europe Market

▲	DAX	Germany	22612.02	+463.99	+2.09%
▼	FTSE 100	United Kingdom	8764.72	-42.72	-0.49%
▲	CAC 40	France	8164.11	+121.92	+1.52%

US Market

▲	Dow Jones		44711.43	+342.87	+0.77%
▲	Nasdaq		19945.65	+295.69	+1.50%
▲	S&P		6115.07	+63.10	+1.04%

Indian Market

▲	Sensex		76388.99	+250.02	+0.33%
▲	Nifty 50		23096.45	+65.05	+0.28%
▲	Bank Nifty		49485.65	+125.80	+0.25%
▲	India VIX		14.96	+0.06	+0.40%
▲	USD/ INR		86.84	+0.09	+0.10%

Snapshot

Top Gainers

Nifty 500

Finolex Cables	13.05%
Honasa Consumer	12.74%
Suven Pharma	6.85%
Redington	6.77%
Muthoot Finance	6.18%

Top Losers

Nifty 500

Natco Pharma	-20.0%
Godfrey Phillips	-8.48%
Aegis Logistics	-7.24%
Vijaya Diagnostic Cen...	-7.08%
Radico Khaitan	-5.0%

Volume Shockers

Volume above 1.5 times weekly average and minimum 5,000 for Nifty 500 stocks

Name	CMP
Redington	244.55
Ashok Leyland	217.07
Honasa Consumer	230.79
Kotak Mahindra Bank	1972.8
Hindustan Petroleum	320.15

52 Week High

Day's high equal to or above yearly high for Nifty 500 stocks

Name	Change %
Shree Cements	-0.04
Redington	6.77
Kotak Mahindra Bank	1.48
SBI Cards and Payment	5.32
Muthoot Finance	6.18

Long & Short Buildup (Stock Futures - Current Expiry)

Long build-up: Open interest and volumes rise, and the price goes up. **Short build-up:** Open interest and volumes rise, but the price goes down.

Long Buildup	OI Change %	Short Buildup	OI Change %
Muthoot Finance Ltd	17.77%	Navin Fluorine Intern...	-8.33%
SBI Cards & Payment S...	15.13%	City Union Bank Ltd	-7.09%
Phoenix Mills Ltd	11.23%	Bata India Ltd	-6.19%
Escorts Kubota Ltd	6.92%	Page Industries Ltd	-5.31%
Prestige Estates Proj...	5.28%	Dr Lal Pathlabs Ltd	-4.74%

Sectoral Indices

1 Day Change



7 Day Change



Market Bulletin

1. Indian markets expected to open lower today, with GIFT Nifty trading around 23,934.50
2. The US Federal Reserve's less dovish outlook on interest rate cuts continues to weigh on global markets.
3. Asian equities are trading mixed, while US stocks were largely unchanged.
4. The Fed now forecasts only two rate cuts in 2025, down from its previous projection of four.
5. The US 10-Year Treasury shed 31 basis points to 4.54 percent, while the 2-Year Treasury was down 14 basis points to 4.31 percent.
6. In commodities, oil edged lower Friday after the Fed's outlook for next year boosted the dollar.
7. Gold headed for a weekly drop, as traders weighed the interest-rate outlook after the Federal Reserve dialed back rate-cut expectations for next year.
8. Asian currencies were trading mixed against the US dollar, with Indonesian Rupiah depreciated the most followed by Thai Baht, South Korean Won and China Renminbi.
9. Bank Of England Keeps Rates Unchanged Even As Three Policymakers Back Cut.
10. Blackstone-backed Ventive Hospitality Launches Rs 1,600-crore IPO After Securing Rs 720 Crore from Anchor Investors
11. Securities in ban period: Bandhan Bank, Granules, Hindustan Copper, Manappuram Finance, NMDC, PVR Inox, SAIL.

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Pivot Levels

Type	R3	R2	R1	PP	S1	S2	S3
Classic	23424	23330	23181	23086	22937	22843	22694
Fibonacci	23330	23237	23179	23086	22993	22936	22843

Advance/ Decline



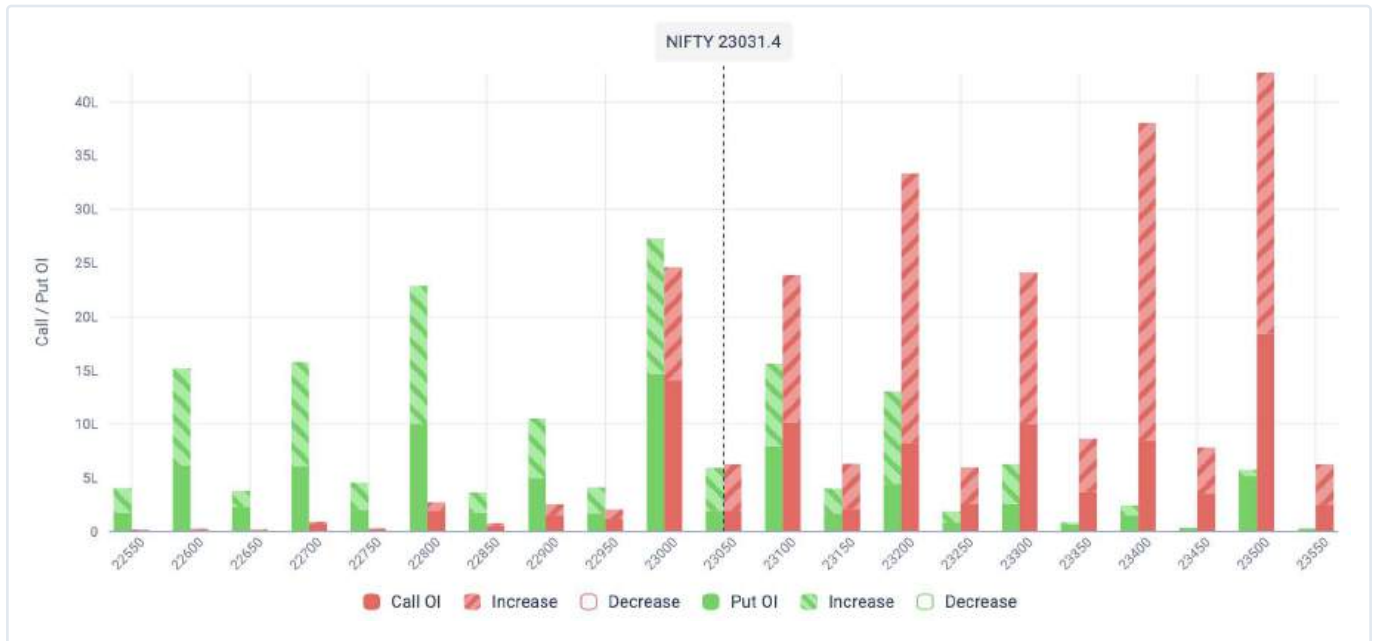
Top 3 Best Performers

Bajaj Finserv	+3.39%
Sun Pharmaceutical	+3.1%
Tata Steel	+3.0%

Top 3 Worst Performers

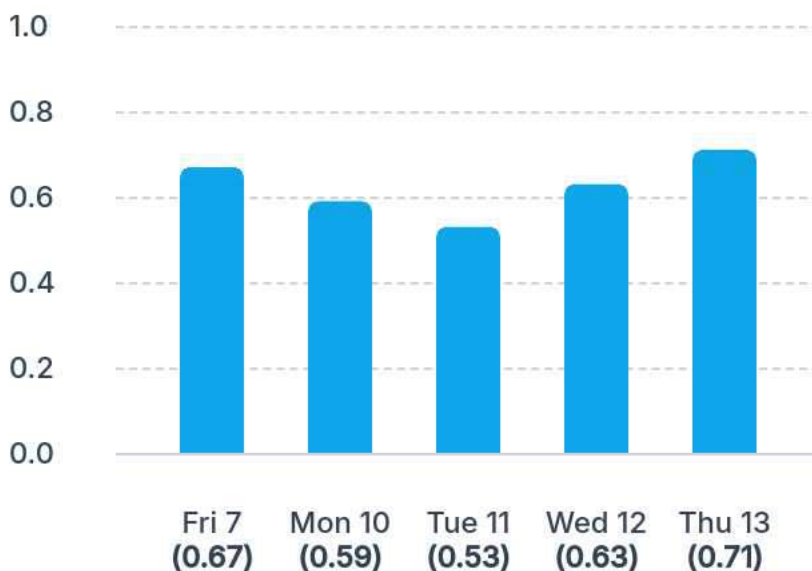
Adani Enterprises	-4.62%
Adani Ports & SEZ	-1.54%
Hero Motocorp	-1.47%

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

Weekly PCR



A PCR above 1 indicates that the put volume has exceeded the call volume. It indicates an increase in the bearish sentiment.

A PCR below 1 indicates that the call volume exceeds the put volume. It signifies a bullish market ahead.

It's important to look at the overall trend of the PCR to see how the market sentiment is changing.



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Classic	50265	50051	49705	49491	49145	48931	48585
Fibonacci	50051	49837	49705	49491	49277	49145	48931

Advance/ Decline

03



09

Top 3 Best Performers

Kotak Mahindra Ban...	+1.48%
Indusind Bank Limited	+0.73%
Axis Bank Limited	+0.13%

Top 3 Worst Performers

Canara Bank	-2.01%
Federal Bank Ltd	-1.17%
Punjab National Bank	-1.08%



Stocks in News

1. **Reliance Industries:** Subsidiary Reliance Digital Health to acquire a 45% stake in Health Alliance Group for \$10 million, expanding healthcare access via a virtual diagnostic platform.
2. **UltraTech Cement:** To acquire 32.72% equity in India Cements and makes an open offer for 26% equity from public shareholders at ₹390/share. CCI also approved the acquisition for ₹3,954 crore.
3. **NTPC Green Energy:** Signs MoU with the Bihar Government to establish renewable energy projects.
4. **Aurobindo Pharma:** UK approval for cancer drug Bevqolva through CuraTeQ Biologics.
5. **Indian Oil Corp.:** Approved ₹657 crore investment in a ₹4,382.2 crore yarn project in Odisha, in collaboration with MCPI.
6. **AGI Greenpac:** Board approved raising up to ₹1,500 crore via shares and equity-linked securities.
7. **Fortis Healthcare:** Acquired a 7.61% stake in Agilus Diagnostics for ₹429 crore.
8. **SRM Contractors:** Received a ₹105 crore work order from NHAI.
9. **Suven Pharmaceuticals:** Acquired a 56% stake in NJ Bio Inc. for \$64.4 million.
10. **Laurus Labs:** Received ₹120 crore investment in Laurus Bio from Eight Roads Ventures and F-Prime Capital.
11. **Religare Enterprises:** SEBI approval for a change in control of sponsor and investment manager.



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Others

FII & DII (Cash)

Date	FII Net Purchase/ Sales	DII Net Purchase/ Sales
Last 30 Days	-86013.3	75965.1
Last 2 Weeks	-26077.8	23887.4
Last 1 Weeks	-15179.7	14835.3
Tue, 11 Feb 2025	-4486.4	4001.9
Wed, 12 Feb 2025	-4969.3	5929.2
Thu, 13 Feb 2025	-2789.9	2934.5

Stocks in Ban List

Adani Power, Ambuja Cements, Bajaj Finance, Chalet Hotels, Jindal Stainless, Jupiter Wagons, Maruti Suzuki India

Results

Adani Power, Ambuja Cements, Bajaj Finance, Chalet Hotels, Jindal Stainless, Jupiter Wagons, Maruti Suzuki India, Radico Khaitan, Raymond and Tata Motors, Aarti Drugs, Allied Blenders and Distillers, Acme Solar Holdings, Arvind Smartspaces, Asahi India Glass, ASK Automotive, Bansal Wire Industries, Blue Dart Express, Blue Jet Healthcare, Blue Star, Brigade Enterprises, Computer Age Management Services, Cartrade Tech, Choice International, Craftsman Automation, Datamatics Global Services, Deepak Fertilisers & Petrochemicals Corp, Eclerx Services, Fino Payments Bank, Gujarat Fluorochemicals, Gabriel India, Indian Bank, JBM Auto, JK Paper, KPIT Technologies, and many more..

Current IPO's

Company Name	Open	Close	₹ Range	Size (Cr.)
Shanmuga Hospital Ltd	13 Feb 2025	17 Feb 2025	54-0	20.62
L.K.Mehta Polymers Ltd	13 Feb 2025	17 Feb 2025	71-0	7.38
Voler Car Ltd	12 Feb 2025	14 Feb 2025	85-90	27
Royal Arc Electrodes Ltd	14 Feb 2025	18 Feb 2025	114-120	36
P S Raj Steels Ltd	12 Feb 2025	14 Feb 2025	132-140	28.28
Tejas Cargo India Ltd	14 Feb 2025	18 Feb 2025	160-168	105.84
Maxvolt Energy Industries Ltd	12 Feb 2025	14 Feb 2025	171-180	54
Quality Power Electrical	14 Feb 2025	18 Feb 2025	401-425	858.70
Hexaware Technologies Ltd	12 Feb 2025	14 Feb 2025	674-708	8750
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-

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Yield Curve

The Yield Curve is a graphical representation of the relationship between interest rates (or yields) and the maturity dates of debt securities, typically government bonds. It shows the yields on bonds of varying maturities, from short-term to long-term, and is used as a tool for analyzing economic expectations and interest rate trends. A typical yield curve slopes upwards, indicating that longer-term bonds offer higher yields than short-term ones due to the risks associated with time, such as inflation or uncertainty.

For example, if the yield on a 2-year bond is 3% and the yield on a 10-year bond is 5%, the yield curve would show an upward slope from short-term to long-term. A normal upward-sloping curve reflects investor expectations of economic growth and potential inflation, which would drive interest rates higher in the future.

The shape of the yield curve can provide insights into market expectations. A steep curve suggests expectations of economic expansion, while a flat or inverted curve may signal economic slowdown or recession fears. Investors use the yield curve to assess interest rate risks, bond prices, and economic outlooks, making it a valuable tool for portfolio management and decision-making.



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