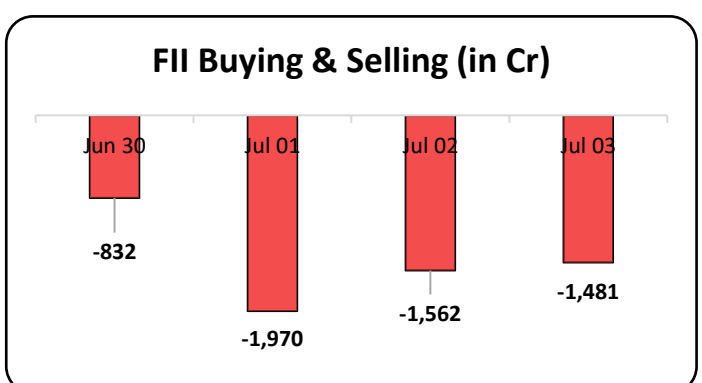
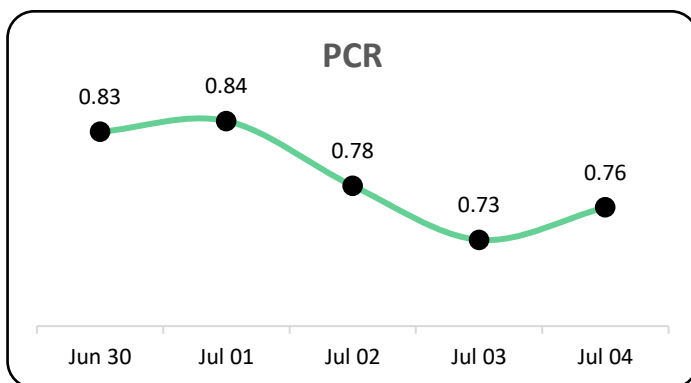


## Executive Summary

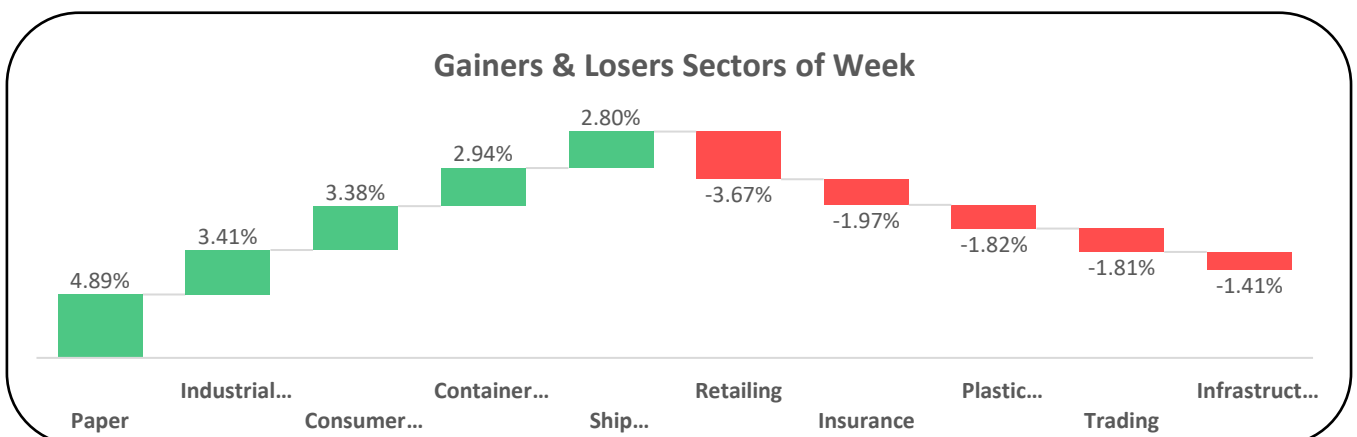
Between June 30th and July 4th, Nifty traded in a volatile but resilient manner, ending slightly higher despite global uncertainties and profit-booking at higher levels. The index largely moved within a tight range. Gains were supported by strength in IT, Auto, and FMCG sectors, while Bank Nifty lagged due to weak financial performance. However, the upcoming US tariff decision on July 9 poses a key risk and could trigger volatility.

## Market Performance Overview



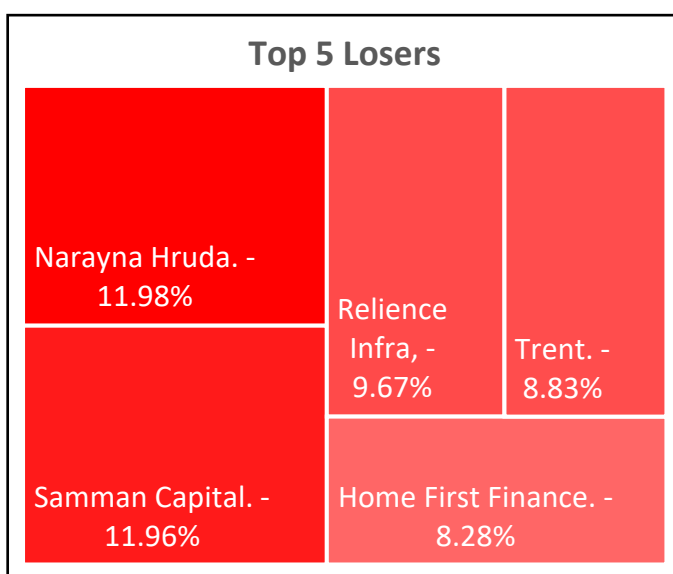
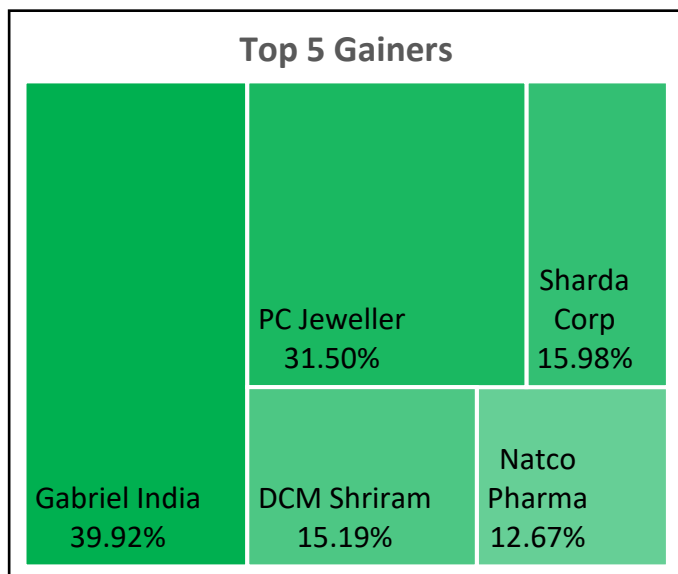
## Sector Highlights

- **Automobiles & Auto Ancillaries:** The auto sector emerged as a bright spot, rising ~1.1% on July 3 following global trade optimism
- **Banking and Financial:** PSU banks led early rally on restructuring hopes, while broader financial stocks pulled the Sensex lower on June 30 amid profit booking
- **Energy Oil & Gas:** Oil & gas / energy firms rallied along with crude prices, providing support to the broader market.
- **Metals & Mining:** Metal stocks were under pressure, contributing to late-week losses; metals were among the primary drags on July 3.
- **Real Estate & Construction:** The realty sector also declined notably on June 30 and July 3, part of broader multi-sector profit-taking.



## Key Stock Movements: Gainers & Losers

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## Macroeconomic Factors: Top Headlines

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- U.S. added 147,000 jobs in June—well above expectations—with unemployment falling to 4.1%, strongly reducing the likelihood of a Fed rate cut in July
- SEBI Bans Jane Street, Brokers See Sell-Off: SEBI barred U.S. trading firm Jane Street over alleged derivatives manipulation, causing large brokerages like Angel One (–6%) and BSE (–5.7%) to tumble. The move spooked the derivatives market, which saw turnover dip 13–17% in June
- New Tariff Tensions Spark Market Volatility: President Trump announced potential new tariffs up to 70% following a July 9 deadline, prompting weak futures and market jitter
- Indian Rupee Near One-Month High: The rupee strengthened to ₹85.20–₹85.31 amid foreign inflows, driven by optimism around India–U.S. trade talks and short-covering
- Asian shares were mostly higher on Friday after U.S. stocks ran up to the edge of another record. U.S. futures and oil prices also logged slight gains.
- India's Financial System Remains Resilient: The RBI's Financial Stability Report noted robust macro fundamentals and a resilient banking system despite global uncertainties
- India Adopts Unified Contract Note: SEBI introduced a single contract note for both BSE and NSE, simplifying trade documentation and reducing costs for investor

## Market Outlook: Upcoming Week 7<sup>th</sup> July – 11<sup>th</sup> July

Week Low/High	25,331-25,669
Current Level	25,461
Support Level	25,200
Resistance Level	25,700–25,800
Current PCR	0.76

**Market Outlook:** Nifty remains positive with a bullish bias, supported by July seasonality and strong institutional flows, aiming for 26,000–26,200 if it holds above 25,400. However, volatility may arise from the July 9 US tariff decision, and a dip below 25,200 could trigger a pullback toward 24,800

- **Downside Watch:** Nifty 50 has its first support around **25,200**, close to the trendline and moving averages. If it breaks below this, the trend may turn weak. The next support is near **24,800**, which was a previous breakout level. In case of a bigger fall,
- **Upside Watch:** Nifty 50 faces immediate resistance at the 25,683–25,700 zone, where it recently saw selling pressure. A breakout above this could push the index toward the psychological level of 26,000.
- **Note:** All levels and strategies are based on current market data and are subject to change. It's essential to stay updated with real-time market movements and adjust strategies accordingly.
- **Disclaimer:** This is not a recommendation. Investing in securities is subject to market risks. Please read all related documents carefully and consult a financial advisor before investing.

