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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,637.01	149.60	0.29%
S&P 500	7,575.39	31.75	0.42%
NASDAQ 100	29,825.11	98.01	0.33%
FTSE 100	10,497.29	24.84	0.24%
NIKKIE (8:00 AM)	67,607.50	-950.23	-1.39%
HANG SENG (8:00 AM)	24,272.00	96.88	0.40%
GOLD	4,080.30	-33.40	-0.81%
SILVER	58.76	-1.41	-2.34%
BRENT OIL	79.07	3.06	4.03%
DOLLAR INDEX	100.91	0.15	0.15%
USD/INR	95.72	0.40	0.42%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **S&P 500** edged higher on Friday to finish just shy of a record closing high, as the blockbuster Nasdaq debut of SK Hynix boosted optimism around memory-chip makers ahead of the upcoming quarterly earnings season.

- **Asian markets** traded lower, earlier on Monday as escalating hostilities in the Middle East and Iran's reported closure of the Strait of Hormuz heightened concerns over global energy supplies and renewed inflationary pressures.

- **Brent Crude** surged after Iran expanded strikes on Gulf states following U.S. attacks, raising the risk of prolonged disruptions to oil shipments through the Strait of Hormuz.

- **GIFT Nifty** trading at ~24,037.00 is indicating a negative start for the Indian market on Monday.

MARKET SNAPSHOT

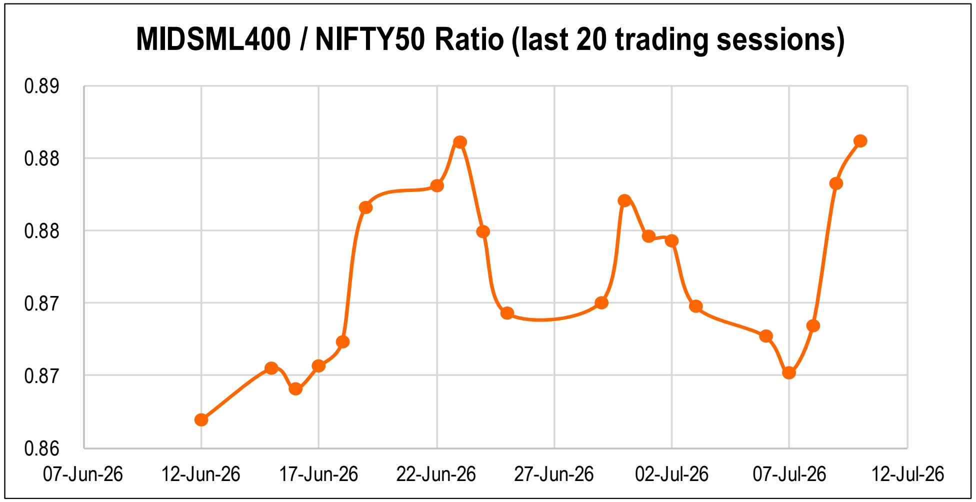
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,206.90	244.10	1.02%
SENSEX	77,569.39	827.57	1.08%
BANK NIFTY	58,045.90	793.45	1.39%
FIN NIFTY	26,831.05	348.60	1.32%
MIDCAP NIFTY	14,820.90	166.10	1.13%
NIFTY SMLCAP 250	18,118.90	243.20	1.36%
INDIA VIX	12.25	-1.11	-8.31%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	42	6	2
NIFTY 500	413	84	3
NIFTY F&O	178	30	2

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	29	58%
NIFTY 500	299	60%

Highlights

- Nifty extended its gains after a gap-up opening, with sustained buying throughout the session indicating strengthening bullish momentum.
- PSU banking stocks witnessed a sharp rebound from lower levels, while the pharma sector experienced profit booking following its recent rally.
- The Nifty MidCap Select Index scaled a fresh record high of 14,820, reaffirming the ongoing strength in the broader market.



State Bank of India

State Bank of India's subsidiary, SBI Funds Management, has reduced its IPO size to Rs 9,812.9 crore from Rs 11,692.9 crore after selling shares worth Rs 1,880 crore to 30 investors in a pre-IPO round. The revised offer size stands at 17.09 crore equity shares, compared with 20.37 crore shares earlier.

InterGlobe Aviation

The Directorate General of Civil Aviation (DGCA) has issued a warning letter to the company over cargo spillage detected on the ground after the arrival of a flight in January 2026, along with subsequent audit findings related to deviations from standard operating procedures (SOPs) and certain provisions of the Aircraft (Carriage of Dangerous Goods) Rules. The company said there is no significant impact on its financials, operations, or other business activities. As directed by the DGCA, the company is required to submit an action-taken report detailing the corrective measures implemented.

Jindal Steel

Gautam Malhotra has resigned as Chief Executive Officer of the company. He will cease to be in the company's services with effect from July 15.

NTPC

The Board has approved the investment proposal for the Lara Super Thermal Power Project Stage III (2x800 MW) at an estimated cost of Rs 20,456.70 crore.

NMDC

The company has revised its iron ore prices with effect from July 10, fixing the Baila Lump price at Rs 5,450 per tonne and the Baila Fines price at Rs 4,700 per tonne.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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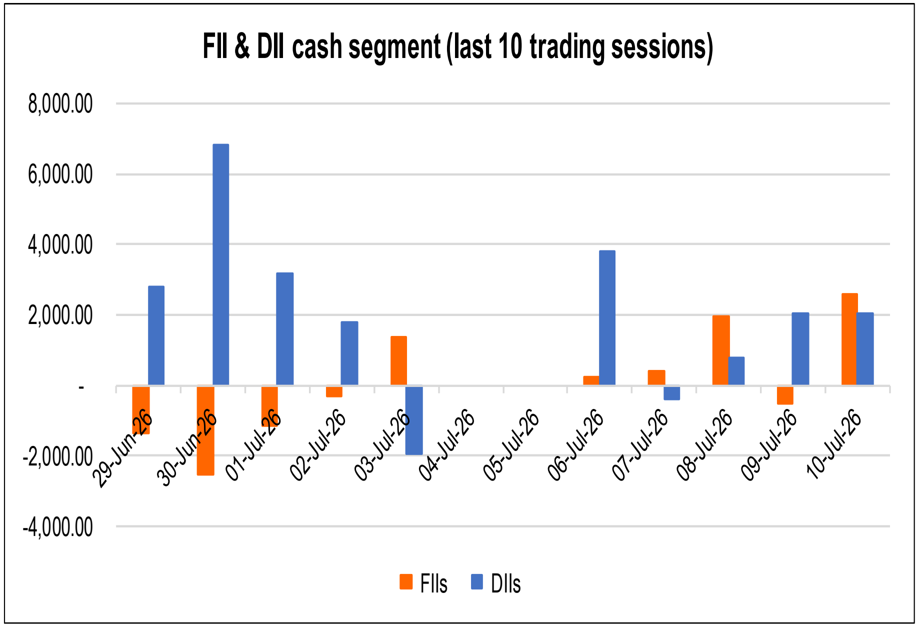
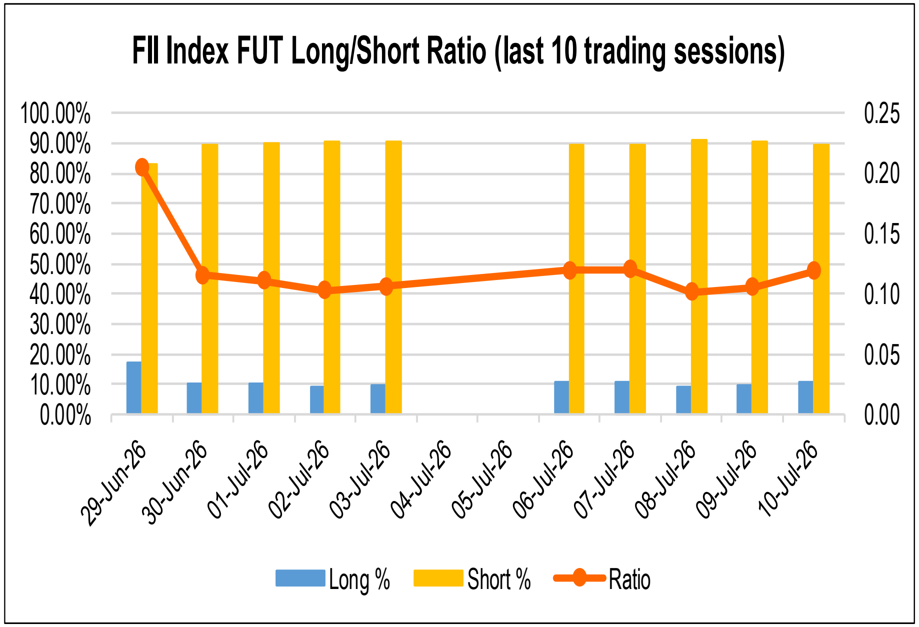
*INR in Crores

Cash Segment	10-Jul-2026	MTD	YTD
FII Net Flows	2,603.72	4,572.89	-3,41,170.94
DII Net Flows	2,019.68	11,265.37	4,81,402.53

*INR in Crores

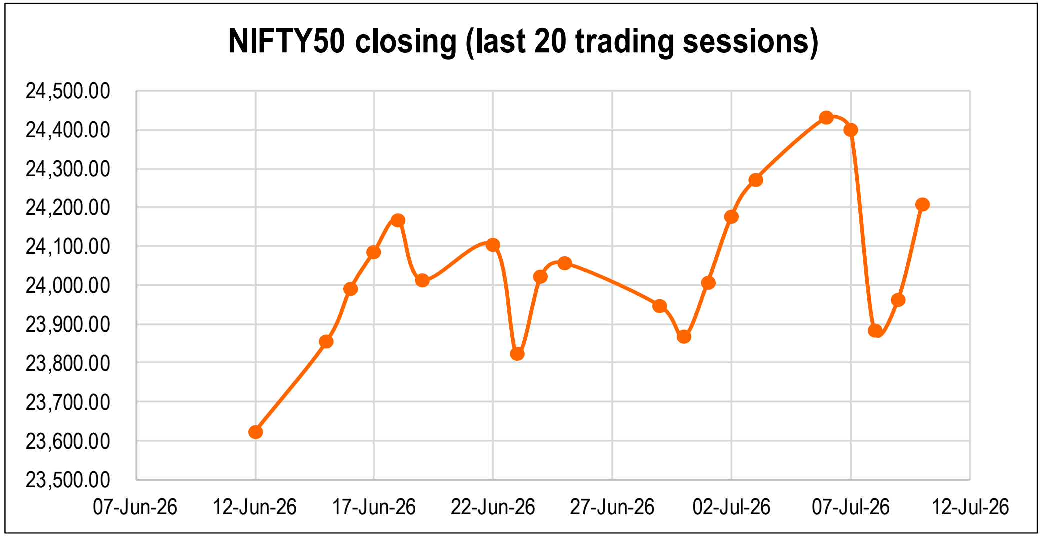
FIIs F&O Flows	10-Jul-2026	MTD
Index Futures	1,910.98	234.90
Index Options	-1,850.19	-45,694.56
Stock Futures	3,303.47	7,029.62
Stock Options	-660.45	-258.70



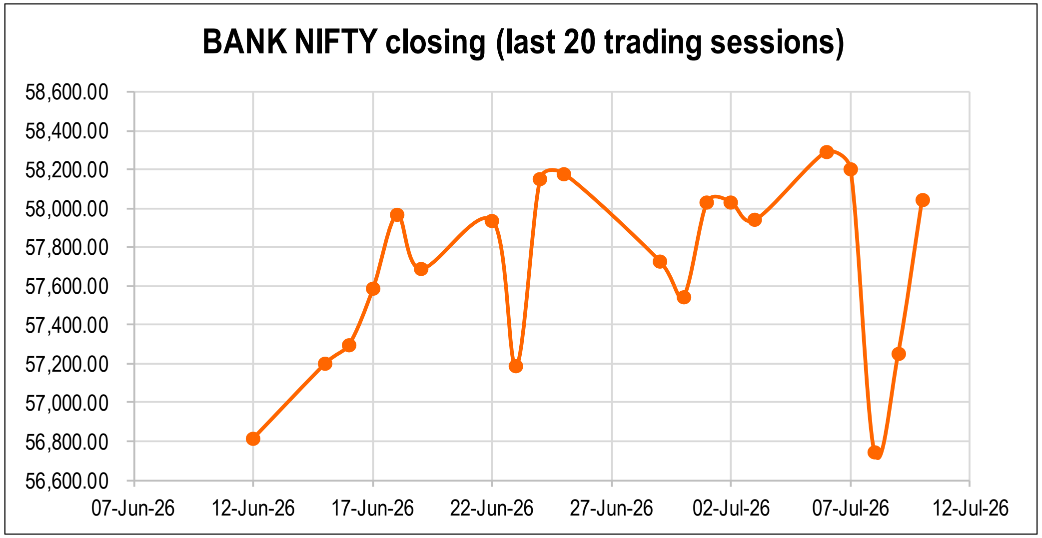


INDEX VIEW

NIFTY	
Spot	24206.90
Futures	24241.90
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	1.13
Key Supply Zones	24350, 24600
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	58045.90
Futures	58200.00
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	58000
PCR (28th JULY)	0.93
Key Supply Zones	58700, 60000
Key Demand Zones	57500, 57000



Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
CDSL	Bullish	1431.90	1300	1517 | 1620	Up to 3 months

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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Realty	938.60	3.49%	3.49%	21.96%	6.91%
Nifty PSU Bank	8,451.60	3.03%	1.41%	-0.90%	-0.96%
Nifty IT	28,010.40	1.96%	2.69%	0.77%	-26.06%
Nifty Metal	12,688.90	1.48%	-0.26%	-1.29%	13.62%
Nifty Bank	58,045.90	1.39%	-0.42%	2.17%	-2.58%
Nifty Financial Services	26,831.05	1.32%	-0.60%	3.42%	-2.83%
Nifty Oil & Gas	11,177.45	1.31%	-0.74%	1.50%	-8.62%
Nifty Private Bank	28,083.95	1.16%	-0.93%	1.57%	-2.22%
Nifty Infrastructure	9,429.45	1.11%	-0.95%	2.09%	-1.94%
Nifty Energy	39,242.05	1.04%	-0.61%	-0.01%	11.09%
Nifty Consumer Durables	38,208.90	0.99%	2.23%	9.22%	3.95%
Nifty Auto	26,860.75	0.69%	-1.80%	2.16%	-4.71%
Nifty Healthcare	16,337.80	0.19%	-0.87%	5.05%	11.60%
Nifty Media	1,484.30	0.10%	-0.91%	-0.22%	2.74%
Nifty Pharma	25,674.10	0.07%	-0.74%	5.31%	12.98%
Nifty FMCG	49,310.60	-0.08%	-1.76%	0.99%	-11.11%

Sector View

Nifty Realty Index witnessed a sharp recovery from the day's low on Friday, closing near the session's high and reinforcing the prevailing bullish momentum. With the index continuing to trade above its short- and long-term moving averages, any near-term pullback is likely to present a buy-on-dips opportunity.

Nifty Consumer Durables Index formed a Doji candlestick near the 38,500 resistance zone, reflecting indecision at higher levels. A breakdown below 38,000 on Monday could trigger further profit booking and extend the corrective phase in the near term.

Stocks in Bullish Momentum: CDSL, GODREJPROP.

Stocks in Bearish Momentum: VBL.

Stocks in F&O ban list: KAYNES.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3157.30	2.39	3053.74	2862.54	2387.74
ADANIPORTS	1828.10	1.56	1823.82	1793.37	1546.42
APOLLOHOSP	8841.00	-0.05	8625.90	8323.83	7660.31
ASIANPAINT	2677.80	0.15	2705.18	2644.35	2564.26
AXISBANK	1323.70	2.01	1351.51	1304.77	1276.94
BAJAJ_AUTO	10156.00	0.01	9969.52	10191.05	9485.10
BAJAJFINSV	1916.00	1.11	1806.74	1774.90	1926.86
BAJFINANCE	1020.50	1.66	987.96	944.61	969.19
BEL	414.85	2.13	415.86	418.93	420.55
BHARTIARTL	1920.40	-0.55	1883.24	1856.29	1951.55
CIPLA	1439.40	-0.13	1422.79	1395.51	1414.70
COALINDIA	429.30	-0.14	440.69	455.17	423.23
DRREDDY	1244.30	-1.99	1314.45	1304.58	1267.68
EICHERMOT	7365.50	0.06	7449.30	7266.25	7192.48
ETERNAL	289.65	-0.96	268.57	256.00	278.06
GRASIM	3213.60	0.68	3152.21	3070.14	2854.92
HCLTECH	1164.10	1.19	1124.54	1151.75	1428.11
HDFCBANK	824.95	0.91	797.65	776.59	889.59
HDFCLIFE	567.70	2.87	576.38	587.96	684.66
HINDALCO	967.45	0.42	979.50	1039.40	918.56
HINDUNILVR	2150.60	0.28	2175.88	2196.25	2306.96
ICICIBANK	1401.20	1.48	1371.91	1305.09	1344.98
INDIGO	5312.00	1.58	5170.18	4707.26	4989.84
INFY	1068.00	1.64	1066.83	1129.28	1385.49
ITC	281.75	-0.11	288.49	294.51	342.55

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	241.96	3.68	239.45	239.00	268.62
JSWSTEEL	1245.40	1.60	1251.67	1269.55	1199.57
KOTAKBANK	377.60	0.12	395.72	387.55	405.84
LT	3945.80	1.54	4101.77	4021.69	3953.56
M&M	3129.40	1.43	3116.29	3111.26	3388.32
MARUTI	13854.00	0.92	13819.95	13448.36	14779.55
MAXHEALTH	1108.10	0.62	1095.00	1044.67	1062.16
NESTLEIND	1455.20	-0.55	1420.53	1428.98	1302.48
NTPC	344.55	0.25	355.72	373.07	356.57
ONGC	244.96	0.54	241.95	265.74	258.67
POWERGRID	283.10	0.62	286.48	294.35	286.12
RELIANCE	1307.80	2.19	1308.52	1335.72	1416.22
SBILIFE	1862.90	2.26	1785.88	1812.56	1919.06
SBIN	1036.00	1.36	1032.77	1008.88	1011.04
SHRIRAMFIN	1044.10	1.20	1024.15	973.38	915.24
SUNPHARMA	1935.50	-0.17	1866.20	1843.74	1748.39
TATACONSUM	1111.90	0.47	1109.00	1149.11	1143.94
TATASTEEL	191.19	1.75	192.46	203.39	190.03
TCS	2069.00	0.95	2103.41	2226.20	2749.67
TECHM	1454.80	2.00	1428.34	1444.84	1486.42
TITAN	4584.40	0.63	4406.19	4271.67	4051.06
TMPV	337.95	1.95	355.50	362.68	366.22
TRENT	2902.80	-0.04	3116.06	2915.87	2824.59
ULTRACEMCO	11711.00	1.62	11448.70	11462.94	11844.50
WIPRO	175.46	1.56	176.54	188.52	222.16

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