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DAILY TECHNICAL & DERIVATIVES REPORT

- Macro Pulse
- Market Snapshot
- India Key News
- Institutional Activity
- Index View
- Stocks & Sector Updates
- Key Moving Averages

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Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,508.27	9.63	0.02%
S&P 500	7,543.59	28.25	0.38%
NASDAQ 100	29,586.29	322.18	1.10%
FTSE 100	10,529.39	31.10	0.30%
NIKKIE (8:00 AM)	68,428.00	684.50	1.01%
HANG SENG (8:00 AM)	24,677.50	336.77	1.38%
GOLD	4,047.47	-22.23	-0.55%
SILVER	58.98	-0.12	-0.21%
BRENT OIL	85.98	1.25	1.48%
DOLLAR INDEX	100.58	-0.13	-0.13%
USD/INR	96.36	0.16	0.16%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **S&P 500** and **Nasdaq Composite** advanced on Tuesday as upbeat earnings from major U.S. banks and a softer-than-expected inflation reading lifted investor sentiment despite escalating tensions in the Middle East. **Asian markets** extended the positive momentum, earlier on Wednesday.

- **Crude Oil** prices continued to rise on Wednesday after Donald Trump reinstated a naval blockade on Iranian ports, prompting retaliatory strikes by Iran on U.S. infrastructure in the region, raising fresh concerns over global energy supplies.

- **GIFT Nifty** trading at ~24,045.00 is indicating a muted start for the Indian market on Wednesday.

MARKET SNAPSHOT

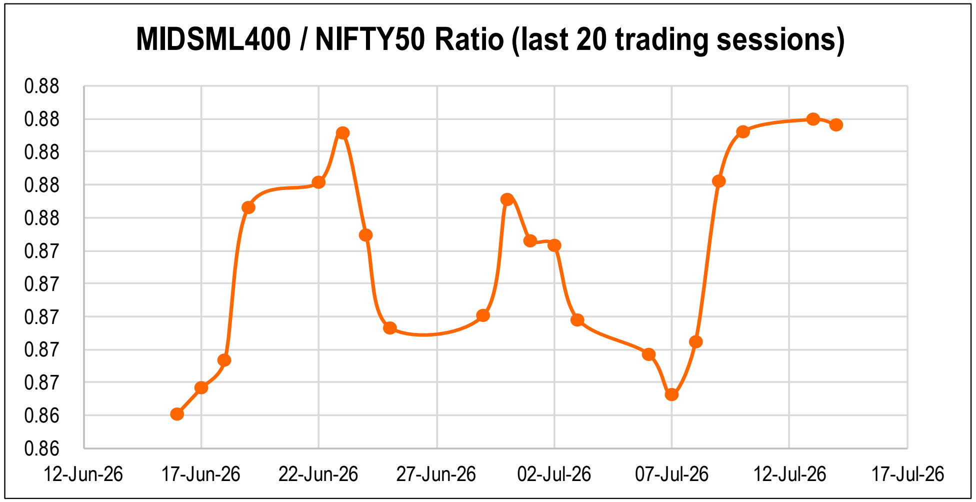
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,052.05	-158.95	-0.66%
SENSEX	77,054.94	-561.46	-0.72%
BANK NIFTY	57,462.30	-669.15	-1.15%
FIN NIFTY	26,536.70	-299.45	-1.12%
MIDCAP NIFTY	14,712.65	-127.00	-0.86%
NIFTY SMLCAP 250	17,974.90	-196.95	-1.08%
INDIA VIX	13.80	0.52	3.88%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	11	39	0
NIFTY 500	115	384	1
NIFTY F&O	57	153	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	22	44%
NIFTY 500	245	49%

Highlights

- Nifty remained range-bound on the weekly expiry but successfully held above the key 24,000 level despite a gap-down opening.
- Profit booking in select IT heavyweights capped the benchmark's upside, with HCL Technologies leading the losers' list.
- Pharma and Consumer Durable stocks attracted fresh buying interest as investors rotated towards defensive sectors amid rising geopolitical uncertainties.



INDIA KEY NEWS

Hero MotoCorp

The board has approved an additional investment of up to Rs 1,000 crore in Ather Energy, an associate company. Hero MotoCorp holds a 29.48 percent stake in Ather Energy before the proposed Rs 1,000 crore investment.

Delhivery

The Reserve Bank of India (RBI) has approved the application for the grant of a Certificate of Registration (CoR) as a Type II NBFC-ND to Delhivery Financial Services, a wholly owned subsidiary of the company. The issuance of the CoR is subject to the submission of certain documents to the satisfaction of the RBI.

IOL Chemicals & Pharmaceuticals

The Centre for Drug Evaluation (CDE) of the National Medical Products Administration (NMPA), China, has approved the company's API product, Clopidogrel Bisulfate. This approval is in addition to the valid Certificate of Suitability (CEP) already held by the company for Clopidogrel Bisulfate, further strengthening its regulatory portfolio and expanding its access to the Chinese pharmaceutical market.

Jammu and Kashmir Bank

The bank has proposed to divest 1.02 crore equity shares (representing 0.50 percent of the paid-up capital) of PNB MetLife India Insurance Company to MetLife International Holdings, LLC, at a price of Rs 117.20 per share, aggregating Rs 120.1 crore.

*Source: moneycontrol.com

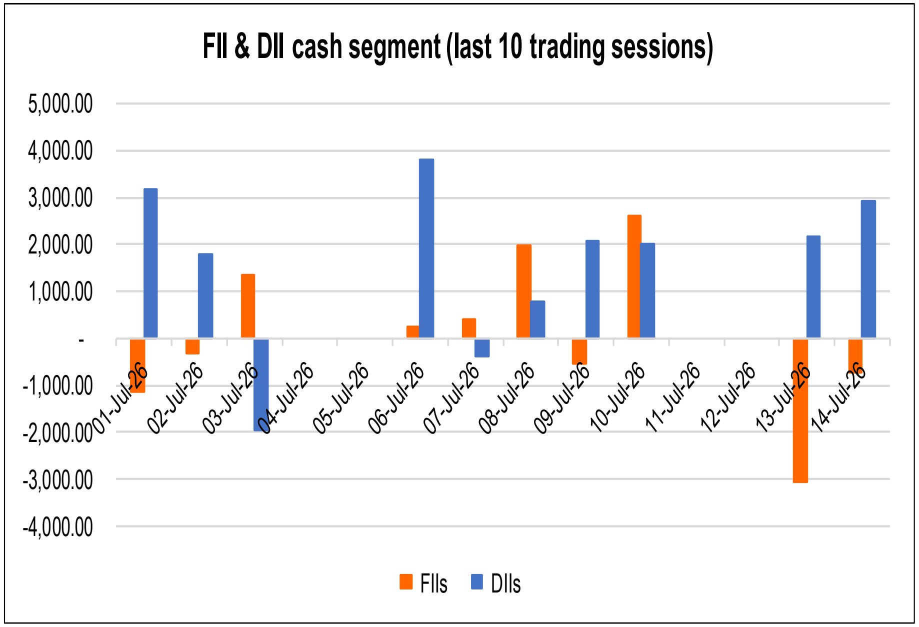
INSTITUTIONAL ACTIVITY

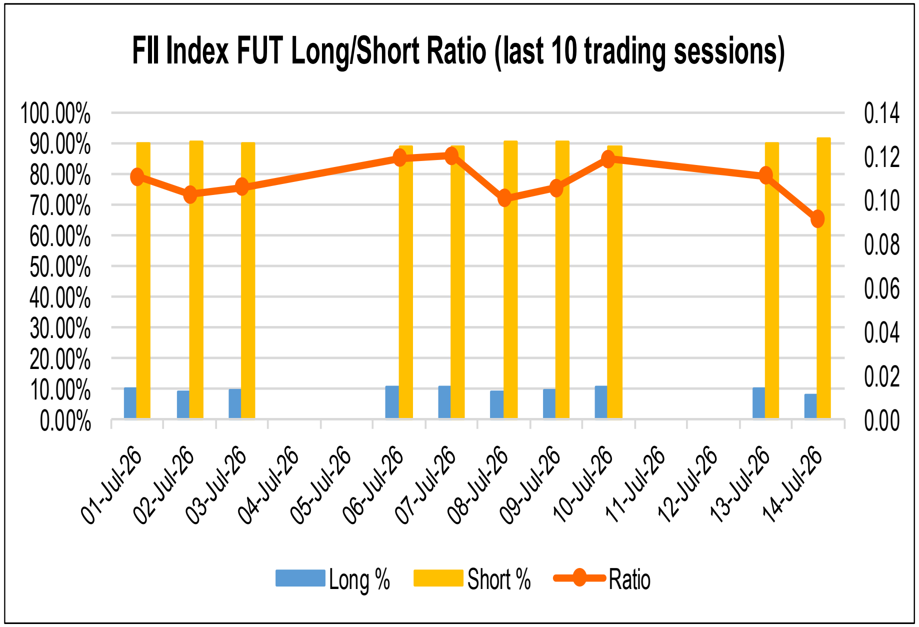
*INR in Crores

Cash Segment	14-Jul-2026	MTD	YTD
FII Net Flows	-739.69	770.93	-3,44,972.90
DII Net Flows	2,927.71	16,364.78	4,86,501.94

*INR in Crores

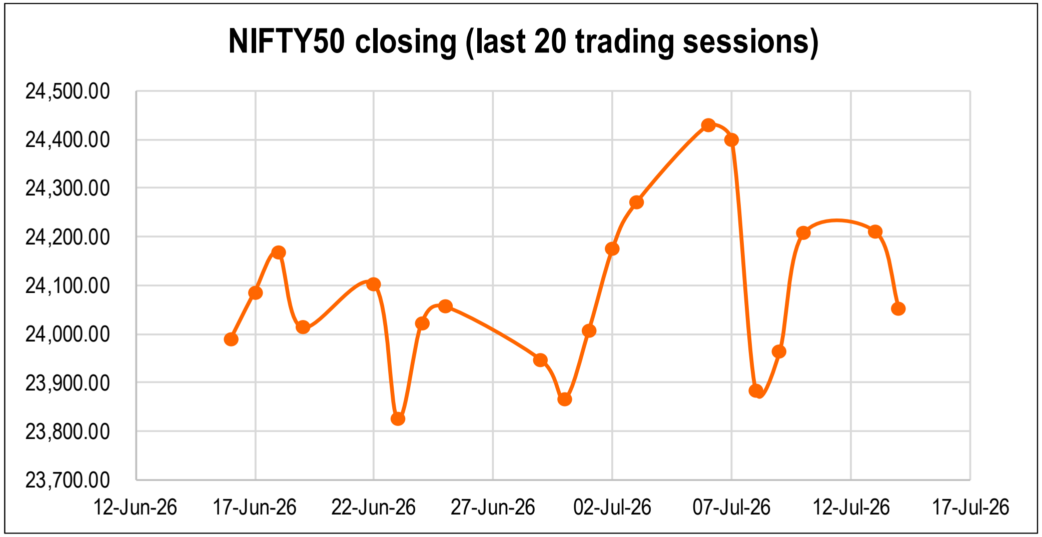
FIIs F&O Flows	14-Jul-2026	MTD
Index Futures	-1,736.24	-1,577.81
Index Options	-47,567.91	-90,672.57
Stock Futures	-5,263.69	817.94
Stock Options	-181.68	-527.39



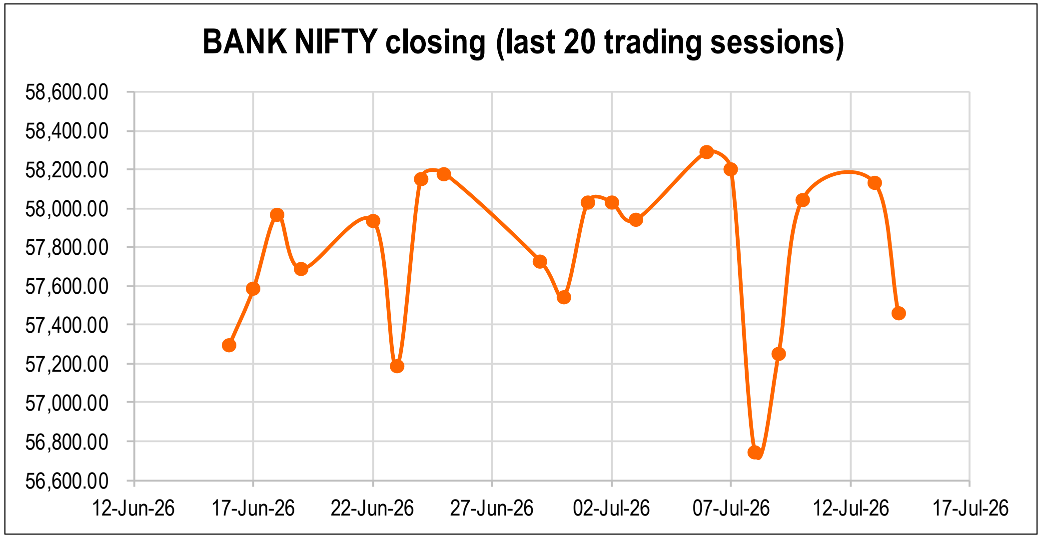


INDEX VIEW

NIFTY	
Spot	24052.05
Futures	24024.20
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	1.05
Key Supply Zones	24350, 24600
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57462.30
Futures	57538.20
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	59000
PCR (28th JULY)	0.85
Key Supply Zones	58000, 58700
Key Demand Zones	57000, 56500



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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Pharma	25,907.10	1.03%	1.88%	7.24%	14.01%
Nifty Healthcare	16,441.45	0.89%	1.83%	6.53%	12.31%
Nifty Metal	12,677.70	0.61%	1.68%	-1.58%	13.52%
Nifty Consumer Durables	38,656.95	0.02%	3.89%	6.04%	5.17%
Nifty Energy	39,203.15	-0.04%	1.31%	-1.78%	10.98%
Nifty Media	1,510.60	-0.31%	4.00%	0.29%	4.56%
Nifty Infrastructure	9,350.75	-0.32%	1.09%	-0.81%	-2.76%
Nifty FMCG	48,524.95	-0.58%	-0.92%	-2.25%	-12.53%
Nifty Oil & Gas	11,102.40	-0.66%	0.94%	-1.70%	-9.23%
Nifty Private Bank	27,915.95	-0.85%	1.18%	0.00%	-2.80%
Nifty IT	28,724.75	-1.00%	4.24%	0.55%	-24.18%
Nifty Financial Services	26,536.70	-1.12%	0.81%	0.36%	-3.90%
Nifty Bank	57,462.30	-1.15%	1.27%	0.29%	-3.56%
Nifty Auto	26,547.50	-1.61%	-0.70%	-1.28%	-5.83%
Nifty PSU Bank	8,307.90	-1.80%	2.92%	-2.98%	-2.64%
Nifty Realty	918.65	-1.97%	4.87%	12.29%	4.64%

Sector View

Nifty Defence Index rebounded from the 9,265 support zone for the third time in the last 11 sessions, reaffirming strong buying interest at lower levels. A decisive breakout above 9,375 could trigger fresh bullish momentum and create short-term opportunities in select defence stocks.

Nifty FMCG Index remained under pressure as it failed to sustain near the day's high of 49,074, eventually closing in the red. The price action indicates weakening momentum, with the index likely to extend its correction towards the 47,800 support zone in the coming sessions.

Stocks in Bullish Momentum: ADANIPOWER, DIVISLAB.

Stocks in Bearish Momentum: DMART, SWIGGY.

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	3188.90	0.36	3078.86	2893.18	2396.27
ADANIPORTS	1821.90	0.64	1824.54	1799.65	1550.49
APOLLOHOSP	8900.50	1.34	8661.73	8370.58	7670.03
ASIANPAINT	2641.00	-0.42	2695.50	2652.37	2565.86
AXISBANK	1317.60	-0.14	1347.13	1306.22	1278.83
BAJAJ_AUTO	10166.00	-2.07	9996.57	10211.24	9497.04
BAJAJFINSV	1869.20	-2.04	1823.64	1780.22	1925.12
BAJFINANCE	1006.60	-1.56	996.39	947.86	969.32
BEL	410.10	-0.17	416.11	417.97	420.54
BHARTIARTL	1936.50	1.82	1891.97	1857.56	1951.33
CIPLA	1438.10	0.80	1427.49	1400.27	1413.34
COALINDIA	430.60	0.09	439.36	453.16	423.57
DRREDDY	1246.20	0.95	1310.74	1301.14	1266.91
EICHERMOT	7279.50	-0.23	7431.27	7271.80	7196.28
ETERNAL	286.15	0.33	272.35	257.40	277.58
GRASIM	3113.30	-0.99	3151.59	3083.34	2857.48
HCLTECH	1166.70	-4.46	1132.49	1151.52	1425.18
HDFCBANK	809.40	-1.05	801.53	778.12	888.01
HDFCLIFE	555.20	-3.17	575.99	586.91	682.54
HINDALCO	974.30	0.77	974.78	1036.12	920.76
HINDUNILVR	2120.20	-0.49	2172.17	2189.96	2302.83
ICICIBANK	1407.70	-0.13	1379.35	1310.55	1344.86
INDIGO	5108.00	-2.32	5207.55	4741.20	4984.22
INFY	1092.90	-0.88	1064.04	1126.21	1381.16
ITC	275.55	-1.47	287.60	292.99	341.22

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	235.97	-2.25	239.55	238.60	267.84
JSWSTEEL	1247.70	0.83	1246.22	1268.37	1200.84
KOTAKBANK	378.65	-1.56	393.43	387.51	405.55
LT	3848.70	-2.03	4079.68	4015.03	3955.59
M&M	3093.30	-2.12	3120.11	3111.34	3383.21
MARUTI	13489.00	-1.50	13820.60	13460.62	14757.38
MAXHEALTH	1092.90	-1.20	1102.88	1048.66	1061.52
NESTLEIND	1427.10	0.01	1425.72	1427.58	1304.68
NTPC	348.15	-1.02	355.61	371.06	356.70
ONGC	248.90	0.18	242.32	263.66	258.80
POWERGRID	286.15	0.05	286.56	293.02	286.10
RELIANCE	1293.00	-0.30	1308.01	1330.39	1415.03
SBILIFE	1840.30	-0.84	1797.41	1813.78	1919.41
SBIN	1015.40	-2.08	1033.49	1006.82	1012.74
SHRIRAMFIN	1013.90	-3.26	1029.47	976.73	919.30
SUNPHARMA	1942.60	1.10	1878.71	1849.28	1751.37
TATACONSUM	1097.60	-0.09	1108.76	1146.78	1143.60
TATASTEEL	188.27	0.62	191.48	202.35	190.19
TCS	2200.60	0.88	2106.34	2214.87	2739.83
TECHM	1484.30	-1.34	1435.04	1445.95	1485.87
TITAN	4573.70	-0.60	4441.58	4278.68	4061.76
TMPV	333.35	-2.60	349.96	362.30	365.28
TRENT	2869.10	-1.07	3121.70	2919.62	2818.97
ULTRACEMCO	11496.00	-0.65	11472.90	11455.90	11833.10
WIPRO	177.14	-0.72	176.24	187.60	221.38

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SEBI Stock Broker Registration No: INZ000159332
SEBI Depository Participant Registration No: IN-DP-728-2022
SEBI Merchant Banker Registration No: INM000009926
Phone: +91-22-61389300
Name of the Compliance Officer: Mr. Sameer Khobrekar
Email ID: Compliance@bobcaps.in; Phone no.: +91-22-61389358
For any queries or grievances, you may contact the Grievance Officer.
Name of the Grievance Officer: Mr. Nilesh Mehta
Email ID: head-customercare@bobcaps.in; Phone no: 92288 60945
Brand Name: BOBCAPS
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