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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,658.64	150.37	0.29%
S&P 500	7,572.40	28.81	0.38%
NASDAQ 100	29,502.60	-83.69	-0.28%
FTSE 100	10,515.92	-13.47	-0.13%
NIKKIE (8:00 AM)	66,845.00	-1,906.51	-2.77%
HANG SENG (8:00 AM)	25,095.00	413.90	1.68%
GOLD	4,036.75	-15.05	-0.37%
SILVER	57.37	-0.06	-0.11%
BRENT OIL	85.29	0.34	0.40%
DOLLAR INDEX	100.33	0.06	0.06%
USD/INR	96.59	0.34	0.36%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** ended higher on Wednesday as softer-than-expected inflation data and a strong start to the second-quarter earnings season boosted investor sentiment.
- **Asian markets** traded lower on Thursday as renewed selling in semiconductor stocks reignited concerns over the sustainability of the AI-driven rally.
- **Crude Oil** prices rose for a fourth consecutive session after fresh U.S. strikes on Iranian military installations heightened fears of renewed conflict and potential supply disruptions through the Strait of Hormuz.
- **GIFT Nifty** trading at ~24,103.00 is indicating a positive start for the Indian market on Thursday.

MARKET SNAPSHOT

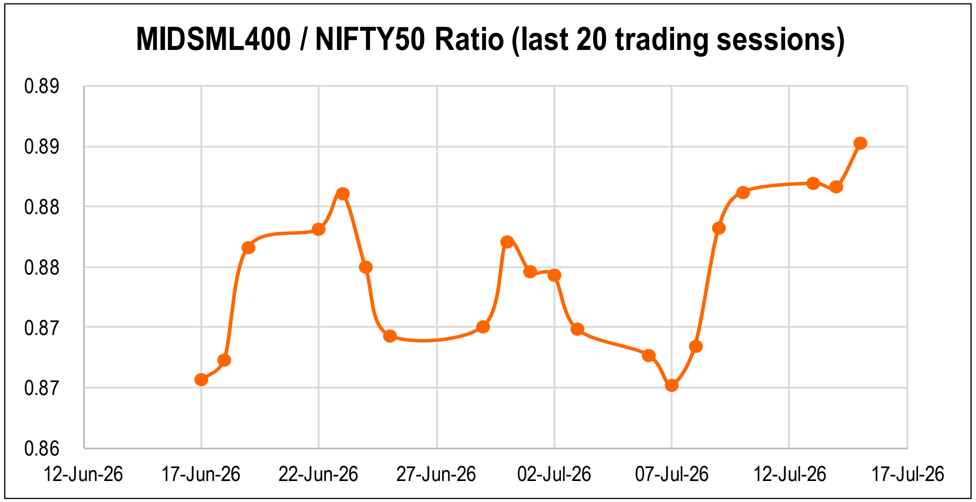
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,078.50	26.45	0.11%
SENSEX	77,185.43	130.49	0.17%
BANK NIFTY	57,757.85	295.55	0.51%
FIN NIFTY	26,693.35	156.65	0.59%
MIDCAP NIFTY	14,771.45	58.80	0.40%
NIFTY SMLCAP 250	18,097.85	122.95	0.68%
INDIA VIX	13.27	-0.48	-3.49%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	27	23	0
NIFTY 500	307	192	1
NIFTY F&O	123	86	1

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	21	42%
NIFTY 500	270	54%

Highlights

- Nifty ended in the green but faced a strong rejection near the 24,220 mark, highlighting resistance at higher levels. The inability to sustain near the day's high suggests that traders continue to book profits on rallies despite the positive undertone.
- Mid-cap and small-cap stocks outperformed the benchmark. Continued strength in the broader market indicates that stock-specific opportunities remain abundant even as Nifty consolidates near resistance levels.



State Bank of India

Sunil Ramgopal Agrawal has joined the bank as Chief Financial Officer (Designate) with effect from July 15. He will become a key managerial personnel of the bank upon assuming charge as Chief Financial Officer with effect from August 1.

Adani Power

The company has signed a 25-year Power Supply Agreement (PSA) with Maharashtra State Electricity Distribution Company (MSEDCL) for the long-term supply of 1,600 MW of power from a 2x800 MW ultra-supercritical thermal power plant to be established under the Design, Build, Finance, Own and Operate (DBFOO) model. The coal linkage for the power plant has been allocated under the Government of India's SHAKTI Policy.

HDFC Bank

The Reserve Bank of India has approved the appointment of Rajiv Kumar as the Part-Time Chairman of HDFC Bank for a period of three years with effect from July 15. Keki Mistry will continue as a Non-Executive, Non-Independent Director of the bank.

NTPC Green Energy

Ayana Renewable Power, a wholly owned subsidiary of ONGC NTPC Green Private Limited, has emerged as the successful bidder in the e-reverse auction conducted by the Solar Energy Corporation of India (SECI). The tender was floated for the selection of wind power developers to set up 2,000 MW of ISTS-connected wind power projects in India under tariff-based competitive bidding. Ayana secured a capacity of 50 MW at a tariff of Rs 3.85 per kWh.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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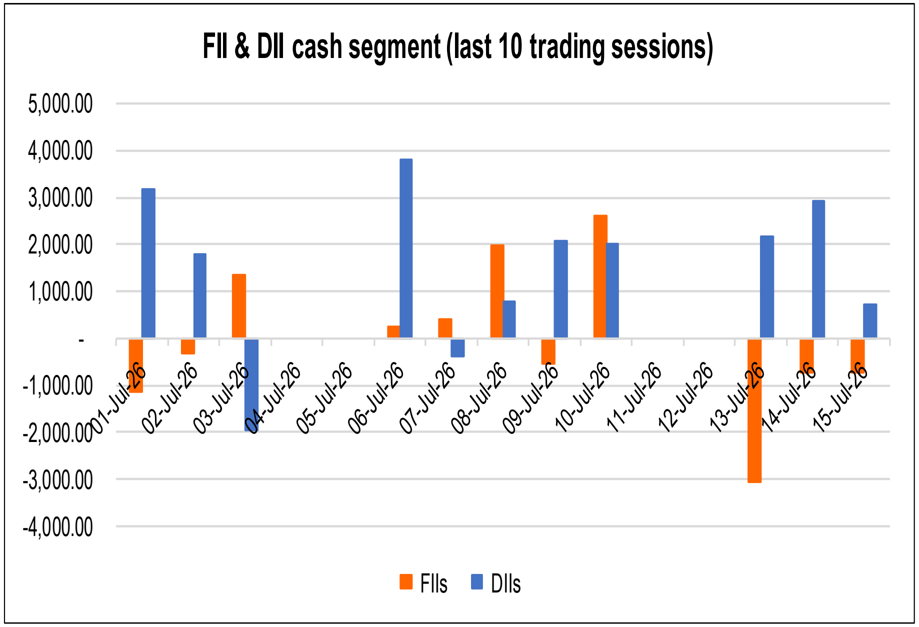
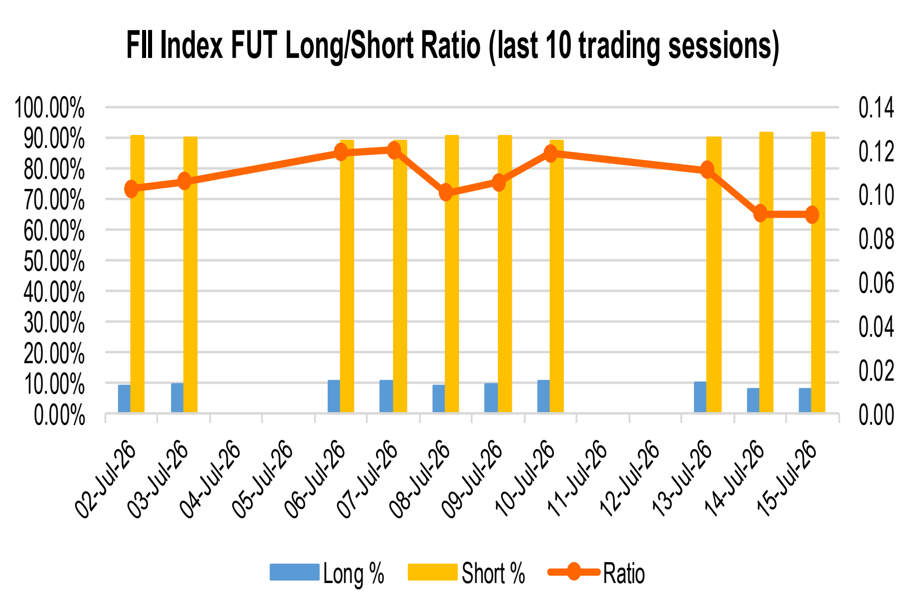
*INR in Crores

Cash Segment	15-Jul-2026	MTD	YTD
FII Net Flows	-735.83	35.10	-3,45,708.73
DII Net Flows	704.93	17,069.71	4,87,206.87

*INR in Crores

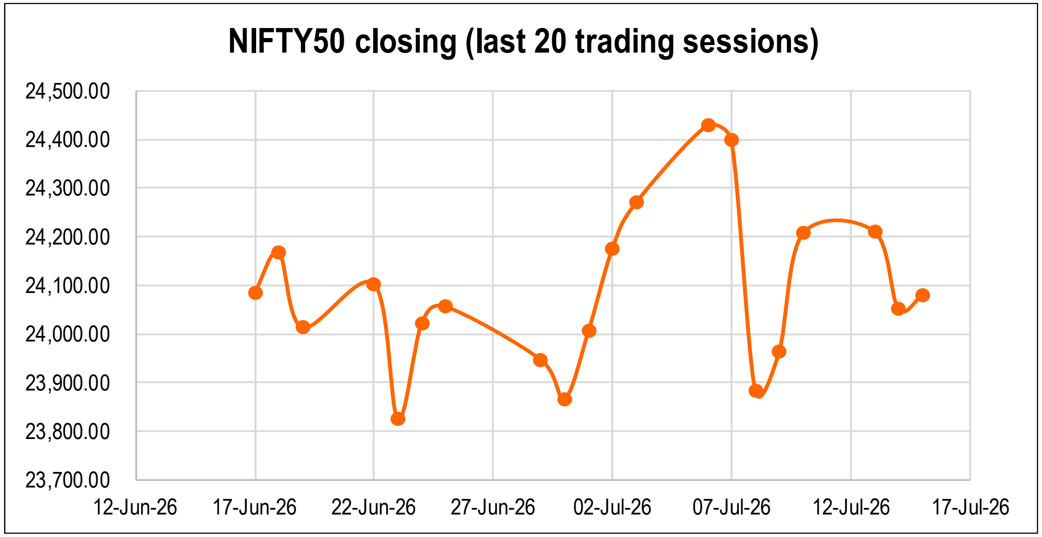
FIIs F&O Flows	15-Jul-2026	MTD
Index Futures	440.74	-1,137.07
Index Options	-7,661.75	-98,334.32
Stock Futures	-1,864.06	-1,046.12
Stock Options	-456.39	-983.78



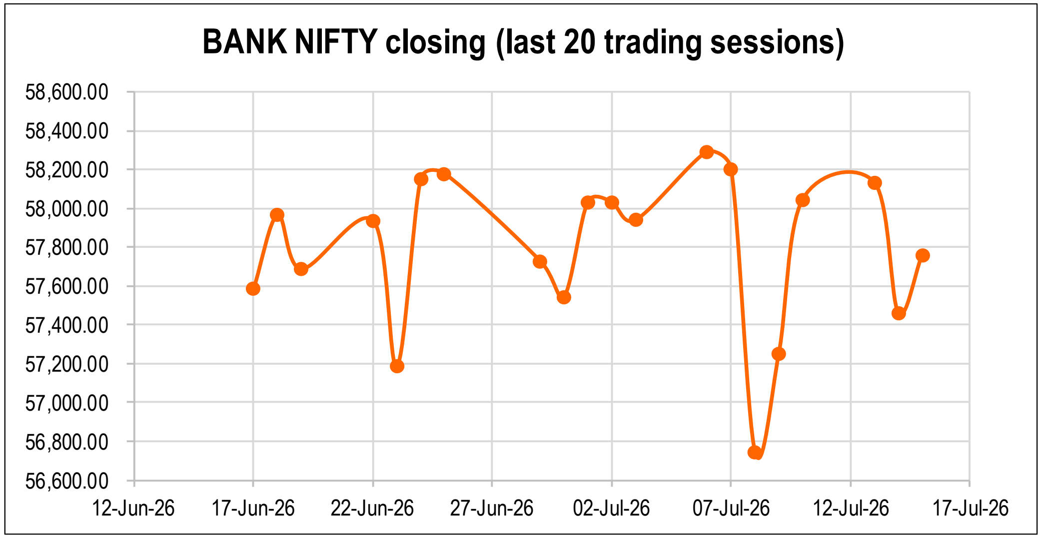


INDEX VIEW

NIFTY	
Spot	24078.50
Futures	24067.80
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	1.08
Key Supply Zones	24250, 24600
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57757.85
Futures	57837.60
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



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty PSU Bank	8,386.85	0.95%	2.24%	-3.74%	-1.71%
Nifty Consumer Durables	38,937.35	0.73%	2.91%	4.60%	5.93%
Nifty Oil & Gas	11,178.85	0.69%	1.32%	-1.11%	-8.60%
Nifty Financial Services	26,693.35	0.59%	0.80%	1.09%	-3.33%
Nifty Bank	57,757.85	0.51%	0.88%	0.30%	-3.06%
Nifty Energy	39,381.25	0.45%	1.40%	-2.13%	11.48%
Nifty Healthcare	16,507.80	0.40%	1.23%	7.17%	12.76%
Nifty Pharma	26,003.60	0.37%	1.35%	7.69%	14.43%
Nifty Auto	26,645.10	0.37%	-0.12%	-0.30%	-5.48%
Nifty Private Bank	28,002.50	0.31%	0.86%	0.39%	-2.50%
Nifty Infrastructure	9,337.80	-0.14%	0.13%	-1.40%	-2.90%
Nifty Realty	915.15	-0.38%	0.90%	12.34%	4.24%
Nifty Media	1,503.70	-0.46%	1.41%	-0.13%	4.08%
Nifty FMCG	48,286.50	-0.49%	-2.16%	-2.56%	-12.96%
Nifty IT	28,532.25	-0.67%	3.86%	-0.96%	-24.69%
Nifty Metal	12,536.90	-1.11%	0.27%	-3.65%	12.26%

Sector View

Post the recent fall, **Nifty Metal** Index has been consolidating within a sideways range over the last 14 trading sessions, reflecting a lack of conviction among buyers. The index has consistently failed to sustain above its 20-day SMA, indicating persistent supply at higher levels. The prevailing price structure continues to favour the bears, and the probability of a further downside move remains elevated until the index confirms a decisive bullish reversal or breaks above key resistance levels.

Stocks in Bullish Momentum: VOLTAS, KALYANKJIL.

Stocks in Bearish Momentum: LT, VEDL.

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	3150.60	-1.20	3089.21	2906.48	2399.78
ADANIPORTS	1829.10	0.40	1824.90	1801.38	1552.49
APOLLOHOSP	8934.00	0.38	8688.90	8394.51	7675.67
ASIANPAINT	2670.00	1.10	2691.60	2656.81	2566.80
AXISBANK	1312.30	-0.40	1344.46	1306.96	1279.71
BAJAJ_AUTO	10323.00	1.54	10015.77	10215.06	9503.80
BAJAJFINSV	1849.60	-1.05	1826.76	1781.80	1924.03
BAJFINANCE	1021.30	1.46	999.47	949.28	969.46
BEL	410.95	0.21	416.28	417.52	420.55
BHARTIARTL	1918.30	-0.94	1895.23	1859.38	1951.11
CIPLA	1438.00	-0.01	1430.73	1402.33	1412.65
COALINDIA	427.55	-0.71	438.19	452.11	423.74
DRREDDY	1229.50	-1.34	1308.37	1299.99	1266.45
EICHERMOT	7404.50	1.72	7423.47	7273.31	7198.44
ETERNAL	294.80	3.02	274.41	258.26	277.37
GRASIM	3086.10	-0.87	3148.88	3087.94	2858.52
HCLTECH	1168.00	0.11	1132.94	1150.87	1423.68
HDFCBANK	815.45	0.75	803.06	778.84	887.25
HDFCLIFE	568.75	2.44	575.70	586.51	681.47
HINDALCO	955.80	-1.90	973.45	1034.38	921.83
HINDUNILVR	2102.60	-0.83	2167.31	2185.82	2300.74
ICICIBANK	1416.20	0.60	1383.45	1313.46	1344.93
INDIGO	5171.00	1.23	5224.10	4759.37	4981.68
INFY	1076.30	-1.52	1060.68	1124.37	1378.84
ITC	276.65	0.40	286.85	292.30	340.55

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	236.59	0.26	239.28	238.28	267.44
JSWSTEEL	1226.90	-1.67	1243.85	1267.57	1201.36
KOTAKBANK	378.40	-0.07	391.96	387.65	405.41
LT	3783.90	-1.68	4059.55	4008.69	3956.13
M&M	3082.90	-0.34	3117.36	3110.87	3380.67
MARUTI	13583.00	0.70	13815.20	13460.68	14745.97
MAXHEALTH	1102.70	0.90	1106.81	1050.49	1061.24
NESTLEIND	1424.40	-0.19	1427.35	1426.92	1305.83
NTPC	344.35	-1.09	355.05	369.94	356.73
ONGC	247.18	-0.69	242.27	262.75	258.85
POWERGRID	280.70	-1.90	286.34	292.26	286.07
RELIANCE	1295.50	0.19	1306.35	1327.04	1414.47
SBILIFE	1866.40	1.42	1802.35	1814.71	1919.54
SBIN	1030.10	1.45	1034.23	1006.05	1013.58
SHRIRAMFIN	1033.80	1.96	1030.87	978.20	921.31
SUNPHARMA	1951.50	0.46	1886.25	1851.84	1752.84
TATACONSUM	1085.50	-1.10	1106.49	1145.28	1143.39
TATASTEEL	185.26	-1.60	190.94	201.81	190.26
TCS	2189.20	-0.52	2105.85	2210.03	2734.93
TECHM	1498.70	0.97	1437.63	1446.49	1485.60
TITAN	4579.40	0.12	4453.65	4283.01	4067.32
TMPV	333.00	-0.10	346.93	362.10	364.81
TRENT	2867.70	-0.05	3120.20	2921.52	2816.37
ULTRACEMCO	11812.00	2.75	11493.95	11456.98	11829.62
WIPRO	174.65	-1.41	175.84	187.08	220.98

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