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DAILY TECHNICAL & DERIVATIVES REPORT

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Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,552.97	-105.67	-0.20%
S&P 500	7,533.77	-38.63	-0.51%
NASDAQ 100	29,025.77	-476.83	-1.62%
FTSE 100	10,572.24	56.32	0.54%
NIKKIE (8:00 AM)	64,026.00	-2,809.54	-4.20%
HANG SENG (8:00 AM)	24,610.50	-398.10	-1.59%
GOLD	3,981.55	-10.55	-0.26%
SILVER	55.20	-0.99	-1.76%
BRENT OIL	84.82	0.59	0.70%
DOLLAR INDEX	100.58	0.02	0.01%
USD/INR	96.55	0.20	0.21%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- Chip stocks dragged the **Nasdaq Composite** and **S&P 500** lower on Thursday, continuing to drive broader market movements despite generally positive U.S. economic data and a strong start to the second-quarter earnings season. **Asian equities** declined for a second consecutive session as the selloff in semiconductor stocks intensified, with investors increasingly questioning whether massive AI-related investments can justify the elevated valuations of technology companies.

- **Gold** was on track for its biggest weekly decline since early June as renewed tensions in the Middle East increased the risk of higher inflation, potentially prompting the Federal Reserve to maintain a tighter monetary policy or even raise interest rates.

- **GIFT Nifty** trading at ~24,088.00 is indicating a muted start for the Indian market on Friday.

MARKET SNAPSHOT

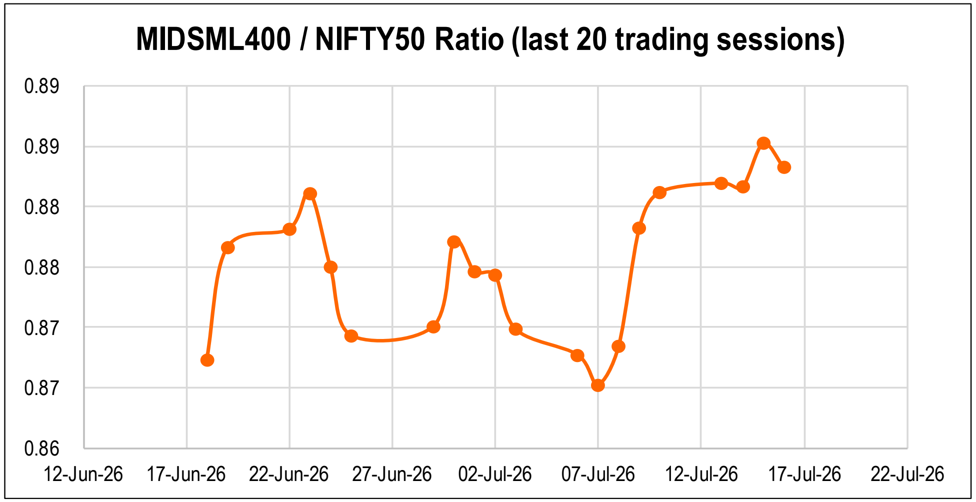
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,072.75	-5.75	-0.02%
SENSEX	77,186.87	1.44	0.00%
BANK NIFTY	57,582.25	-175.60	-0.30%
FIN NIFTY	26,556.70	-136.65	-0.51%
MIDCAP NIFTY	14,793.25	21.80	0.15%
NIFTY SMLCAP 250	18,109.05	11.20	0.06%
INDIA VIX	12.87	-0.40	-3.01%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	21	29	0
NIFTY 500	219	280	1
NIFTY F&O	83	126	1

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	22	44%
NIFTY 500	251	50%

Highlights

- Nifty remained range-bound on Thursday and closed flat, reflecting a lack of strong directional momentum.
- The benchmark continues to consolidate near current levels as market participants await fresh triggers for the next major move.
- FIIs have turned net sellers for July so far, highlighting cautious institutional sentiment towards Indian equities.



INDIA KEY NEWS

PC Jeweller
The board has approved raising up to Rs 1,000 crore through the issuance of equity shares via a Qualified Institutions Placement (QIP) in one or more tranches.

Coal India
The company has received the commissioning certificate from the Gujarat Energy Development Agency (GEDA) for 200 MW of solar power capacity out of the 300 MW solar power project at Khavda, Gujarat.

Maruti Suzuki India
Maruti Suzuki will challenge the July 14 order passed by the District Consumer Disputes Redressal Commission, Raipur, which directed the company to replace a customer's vehicle with a new E20-compatible model after the consumer alleged problems linked to the use of E20 petrol. The company said the vehicle involved in the case was already E20-compatible and fully capable of operating on E20 fuel, as disclosed in the owner's manual. The car was sold to the customer in June 2024 but had been manufactured in January 2023. Maruti Suzuki further stated that there was evidence of contamination in the fuel collected from the customer's vehicle and that several other relevant facts had not been reflected in the Commission's order.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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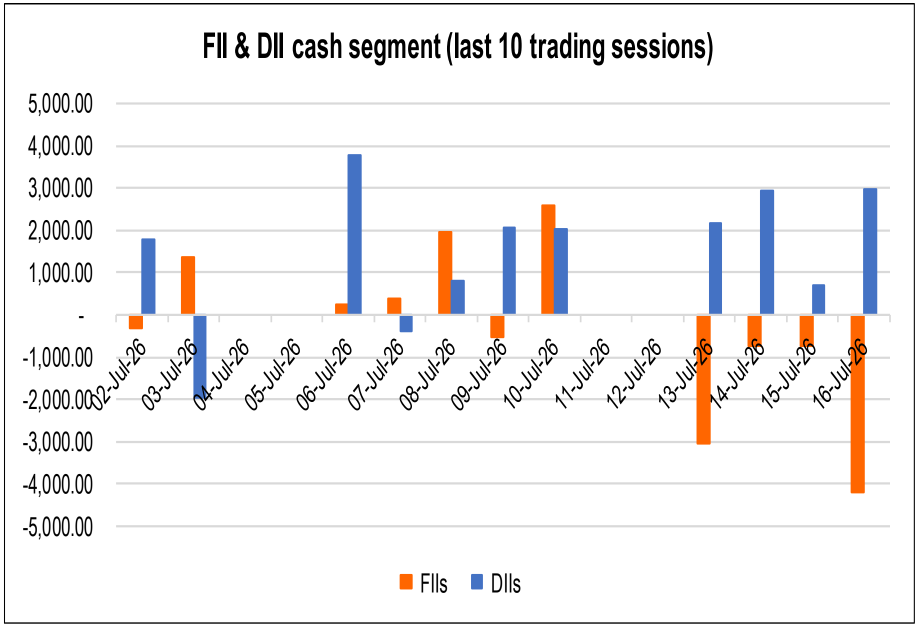
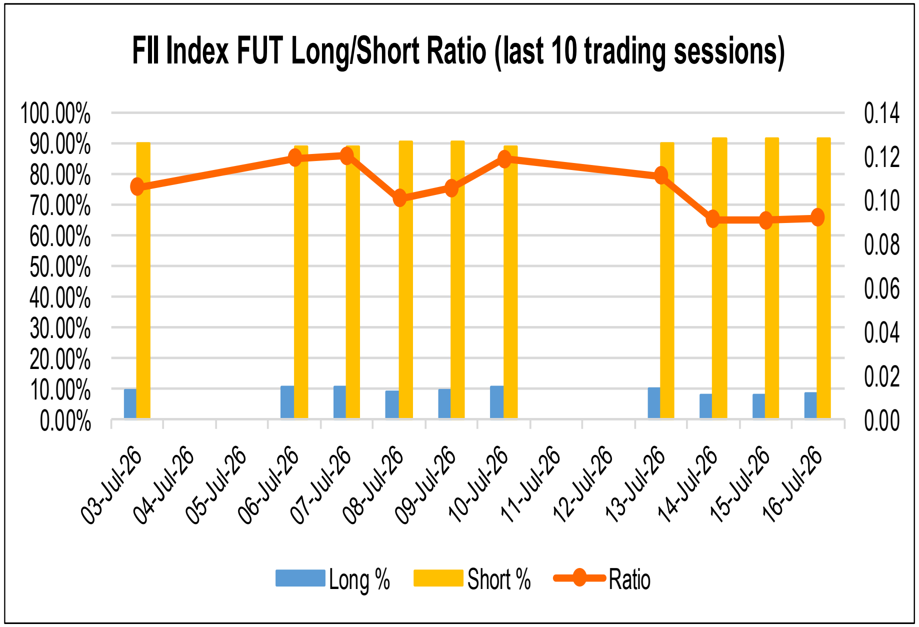
*INR in Crores

Cash Segment	16-Jul-2026	MTD	YTD
FII Net Flows	-4,205.46	-4,170.46	-3,49,914.29
DII Net Flows	2,986.41	20,056.20	4,90,193.28

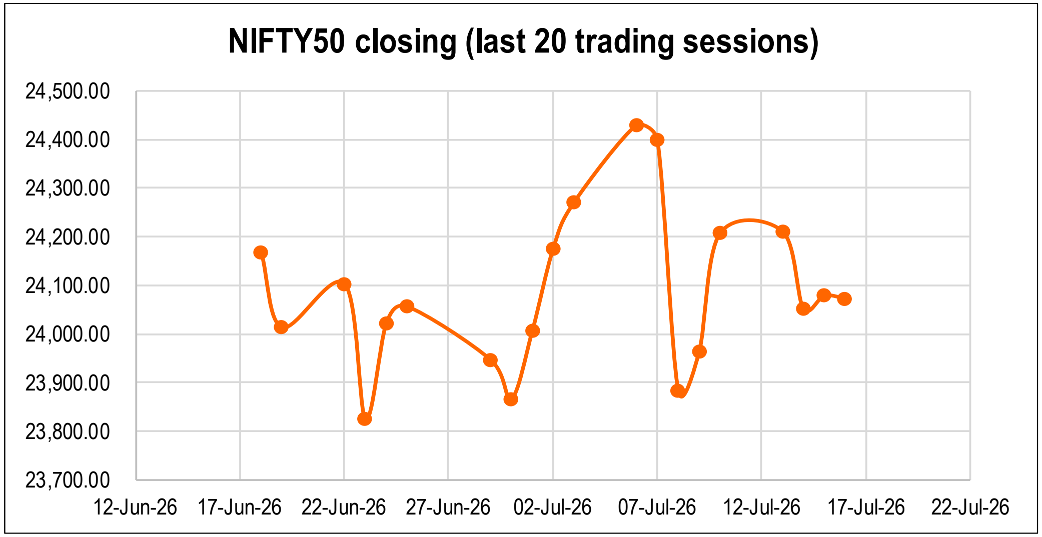
*INR in Crores

FIIs F&O Flows	16-Jul-2026	MTD
Index Futures	1,994.32	857.25
Index Options	-270.41	-98,604.73
Stock Futures	1,308.49	262.37
Stock Options	-445.75	-1,429.53





NIFTY	
Spot	24072.75
Futures	24096.40
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	1.06
Key Supply Zones	24250, 24600
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57582.25
Futures	57791.00
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	59000
PCR (28th JULY)	0.79
Key Supply Zones	58000, 58700
Key Demand Zones	57000, 56500

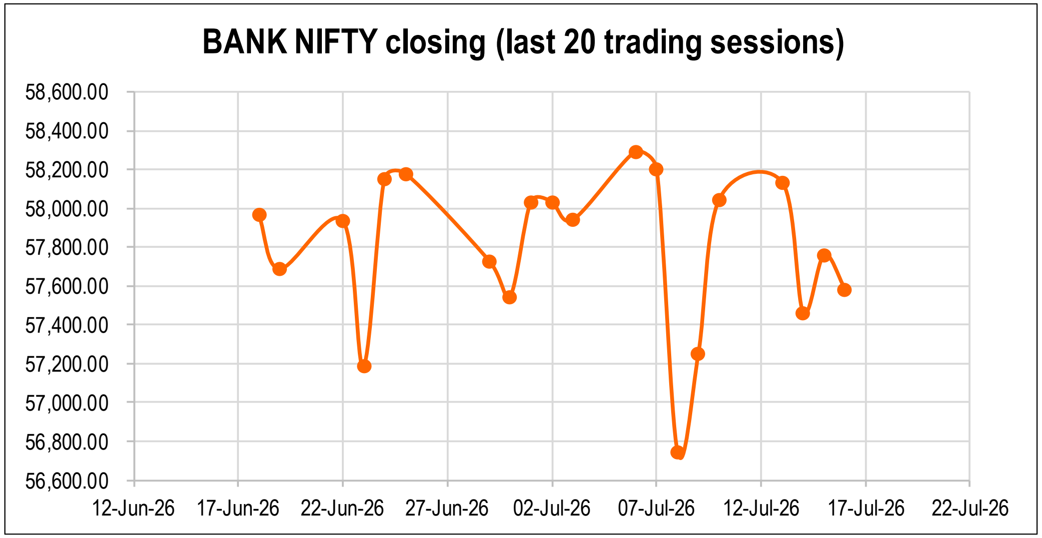


CHART OF THE DAY

Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
AMBER	Bullish	8016.50	7320	8496 | 9300	Up to 3 months

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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Consumer Durables	39,514.00	1.48%	3.42%	5.70%	7.50%
Nifty Media	1,521.40	1.18%	2.50%	0.49%	5.31%
Nifty IT	28,722.60	0.67%	2.54%	0.90%	-24.18%
Nifty Auto	26,767.55	0.46%	-0.35%	0.08%	-5.04%
Nifty FMCG	48,408.00	0.25%	-1.83%	-2.51%	-12.74%
Nifty Oil & Gas	11,188.15	0.08%	0.10%	-1.02%	-8.53%
Nifty Pharma	26,008.05	0.02%	1.30%	7.11%	14.45%
Nifty Infrastructure	9,331.30	-0.07%	-1.04%	-1.77%	-2.96%
Nifty Energy	39,345.80	-0.09%	0.26%	-2.75%	11.38%
Nifty Healthcare	16,493.75	-0.09%	0.95%	6.04%	12.66%
Nifty Bank	57,582.25	-0.30%	-0.80%	-0.66%	-3.36%
Nifty Private Bank	27,915.60	-0.31%	-0.60%	-0.41%	-2.80%
Nifty Metal	12,495.90	-0.33%	-1.52%	-3.95%	11.89%
Nifty PSU Bank	8,347.90	-0.46%	-1.23%	-4.82%	-2.17%
Nifty Financial Services	26,556.70	-0.51%	-1.02%	-0.09%	-3.83%
Nifty Realty	906.15	-0.98%	-3.46%	10.48%	3.21%

Sector View

Nifty MidCap 100 Index formed a Bearish Engulfing pattern near the 63,000 resistance zone on the daily chart, signalling potential exhaustion in the prevailing uptrend. The setup warrants a cautious approach towards mid-cap stocks, as the current risk–reward appears unfavourable. 62,300 is likely to act as the immediate support in case of further selling pressure.

Stocks in Bullish Momentum: DIXON, SRF.

Stocks in Bearish Momentum: CAMS.

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	3151.40	0.03	3099.18	2920.27	2402.79
ADANIPORTS	1826.40	-0.15	1824.79	1803.41	1554.40
APOLLOHOSP	8888.00	-0.51	8711.93	8416.83	7681.42
ASIANPAINT	2674.70	0.18	2688.43	2661.71	2567.76
AXISBANK	1307.60	-0.36	1342.30	1307.92	1280.53
BAJAJ_AUTO	10331.50	0.08	10030.25	10220.77	9510.19
BAJAJFINSV	1838.60	-0.59	1830.46	1782.68	1922.88
BAJFINANCE	1037.60	1.60	1003.43	950.86	969.62
BEL	407.10	-0.94	415.64	417.00	420.55
BHARTIARTL	1921.80	0.18	1897.54	1861.70	1950.94
CIPLA	1429.50	-0.59	1434.67	1404.24	1412.09
COALINDIA	427.35	-0.05	436.77	451.21	423.90
DRREDDY	1224.40	-0.41	1306.14	1299.05	1266.06
EICHERMOT	7418.50	0.19	7418.95	7275.65	7200.80
ETERNAL	286.45	-2.83	275.81	259.02	277.10
GRASIM	3072.90	-0.43	3145.01	3091.97	2859.62
HCLTECH	1187.40	1.66	1133.97	1150.61	1422.42
HDFCBANK	808.30	-0.88	804.12	779.56	886.47
HDFCLIFE	567.60	-0.20	574.99	585.98	680.37
HINDALCO	959.30	0.37	971.02	1032.47	922.89
HINDUNILVR	2098.40	-0.20	2162.35	2181.24	2298.57
ICICIBANK	1418.20	0.14	1387.51	1316.80	1345.02
INDIGO	5265.50	1.83	5243.46	4779.92	4979.27
INFY	1082.40	0.57	1056.91	1122.45	1376.75
ITC	279.35	0.98	286.28	291.66	339.91

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	235.65	-0.40	238.91	238.02	267.05
JSWSTEEL	1221.00	-0.48	1240.54	1266.95	1201.88
KOTAKBANK	377.15	-0.33	390.59	387.76	405.28
LT	3775.60	-0.22	4037.95	4003.11	3956.78
M&M	3117.80	1.13	3116.61	3109.01	3378.33
MARUTI	13783.00	1.47	13822.85	13467.82	14735.81
MAXHEALTH	1098.20	-0.41	1110.42	1052.44	1060.87
NESTLEIND	1423.50	-0.06	1428.16	1425.84	1307.01
NTPC	342.45	-0.55	354.40	368.82	356.75
ONGC	246.75	-0.17	242.36	261.89	258.90
POWERGRID	280.75	0.02	286.06	291.48	286.04
RELIANCE	1296.60	0.08	1304.54	1323.70	1414.00
SBILIFE	1822.10	-2.37	1803.78	1814.72	1919.36
SBIN	1031.20	0.11	1034.46	1005.48	1014.46
SHRIRAMFIN	1024.40	-0.91	1031.72	979.40	923.29
SUNPHARMA	1950.10	-0.07	1892.74	1854.43	1754.37
TATACONSUM	1088.50	0.28	1104.69	1143.98	1143.18
TATASTEEL	185.49	0.12	190.26	201.30	190.33
TCS	2201.00	0.54	2104.75	2205.50	2730.56
TECHM	1510.30	0.77	1440.03	1447.65	1485.62
TITAN	4625.80	1.01	4465.91	4288.05	4073.17
TMPV	331.80	-0.36	345.47	361.93	364.37
TRENT	2860.20	-0.26	3108.07	2923.59	2813.97
ULTRACEMCO	11771.00	-0.35	11513.85	11453.14	11825.23
WIPRO	177.74	1.77	175.50	186.64	220.62

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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
Website: https://www.bobcaps.in/
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