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DAILY TECHNICAL & DERIVATIVES REPORT

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20th July, 2026

Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,146.42	-406.55	-0.77%
S&P 500	7,457.69	-76.08	-1.01%
NASDAQ 100	28,592.66	-433.11	-1.49%
FTSE 100	10,600.37	28.13	0.27%
NIKKIE (8:00 AM)	64,141.12	-2,694.42	-4.03%
HANG SENG (8:00 AM)	25,011.00	448.76	1.83%
GOLD	4,016.70	-83.00	-2.02%
SILVER	57.08	0.76	1.34%
BRENT OIL	90.18	2.08	2.36%
DOLLAR INDEX	100.56	-0.02	-0.02%
USD/INR	96.65	0.37	0.39%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** extended its decline on Friday as a pullback on stocks associated with the AI boom, which has driven many of the gains so far this year, morphed into a larger risk-off sentiment.

- **Asian share markets** were hesitant on Monday as the escalating conflict in the Gulf lifted oil prices and fanned fears of inflation, while a packed week of major tech earnings will further test investor faith in the AI trade.

- **Oil** prices jumped 3%, earlier on Monday, with Brent surpassing $90 a barrel, as the United States and Iran expanded attacks in the Middle East that have curbed energy shipments in the Strait of Hormuz.

- **GIFT Nifty** trading at ~24,304.00 is indicating a negative bias for the Indian market on Monday.

MARKET SNAPSHOT

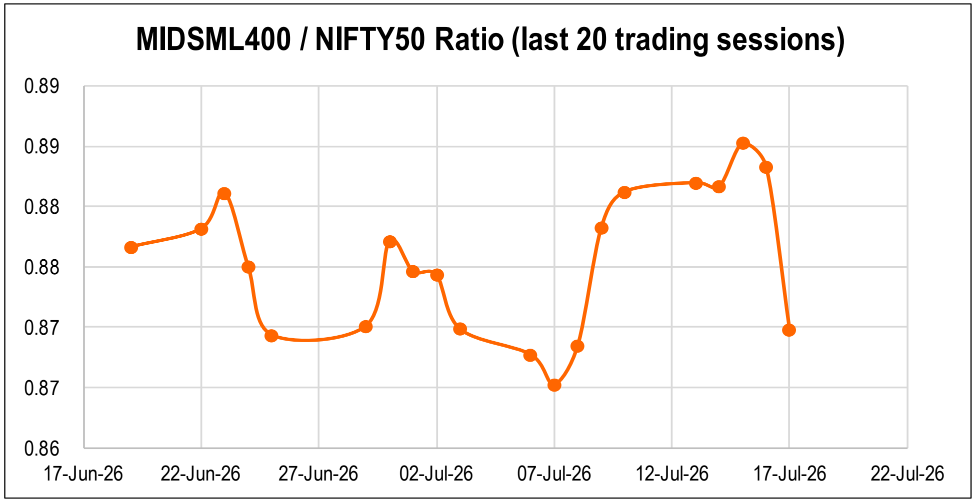
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,334.30	261.55	1.09%
SENSEX	78,151.45	964.58	1.25%
BANK NIFTY	58,521.40	939.15	1.63%
FIN NIFTY	26,903.35	346.65	1.31%
MIDCAP NIFTY	14,715.40	-77.85	-0.53%
NIFTY SMLCAP 250	18,003.50	-105.55	-0.58%
INDIA VIX	13.15	0.27	2.08%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	37	13	0
NIFTY 500	205	294	1
NIFTY F&O	98	112	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	28	56%
NIFTY 500	237	47%

Highlights

- Nifty broke above the key 24,200 resistance zone, strengthening the near-term bullish outlook.
- Broad-based participation across banking, IT and auto stocks supported the breakout and added conviction to the upward move. Profit booking in pharma and healthcare stocks indicated sectoral rotation as investors shifted towards cyclical and growth-oriented segments.
- Mid-cap and small-cap stocks underperformed market heavyweights, suggesting that the rally remained large-cap driven.



NATCO Pharma

The company has received tentative approval from the US Food and Drug Administration (USFDA) for Olaparib 100 mg and 150 mg tablets, which are bioequivalent to the reference listed drug (RLD), Lynparza tablets of AstraZeneca Pharmaceuticals, for the indication mentioned in the approved labelling. NATCO will manufacture the Olaparib tablets, while its partner, Alembic Pharmaceuticals, will distribute the product in the US. According to industry sales data, Olaparib tablets recorded estimated US sales of approximately $1.4 billion for the 12 months ended March 2026.

Nuvama Wealth Management

The company has received an administrative warning from the Securities and Exchange Board of India (SEBI) in connection with the inspection of public issues handled by the company as a merchant banker. The warning advises the company to exercise caution and avoid recurrence of the observations in the future. The company said the letter has no impact on its financials, operations, or any other activities, including those of its subsidiaries and associates.

GAIL India

GAIL (India) has signed a Memorandum of Understanding (MoU) with Khanij Bidesh India (KABIL) to collaborate in the field of critical and strategic minerals, supporting India's long-term resource security.

Cipla

The US Food and Drug Administration (USFDA) conducted a routine current Good Manufacturing Practices (cGMP) inspection at the manufacturing facility of InvaGen Pharmaceuticals Inc., the company's wholly owned subsidiary in New York, from July 13 to July 17. At the conclusion of the inspection, the company received one inspectional observation in Form 483.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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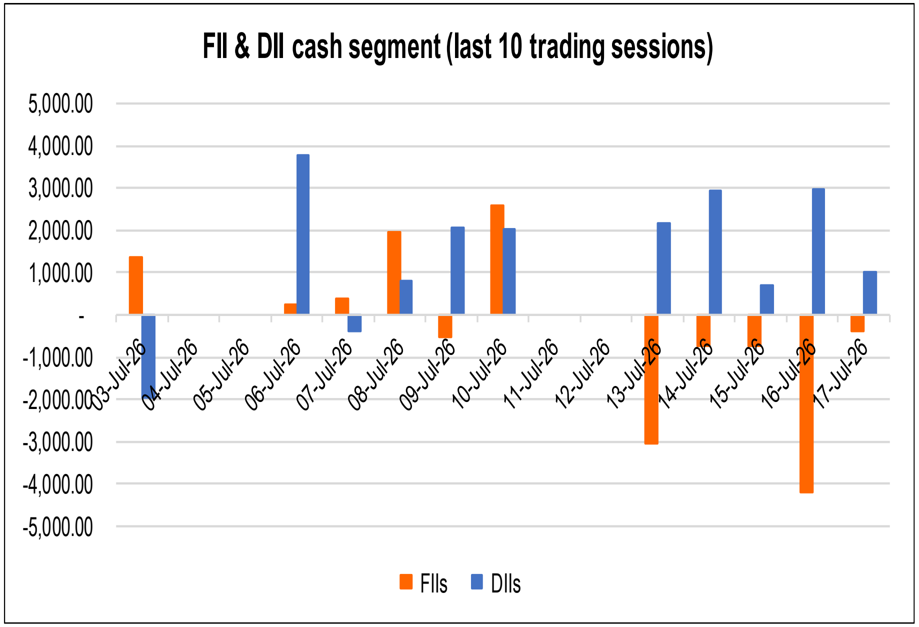
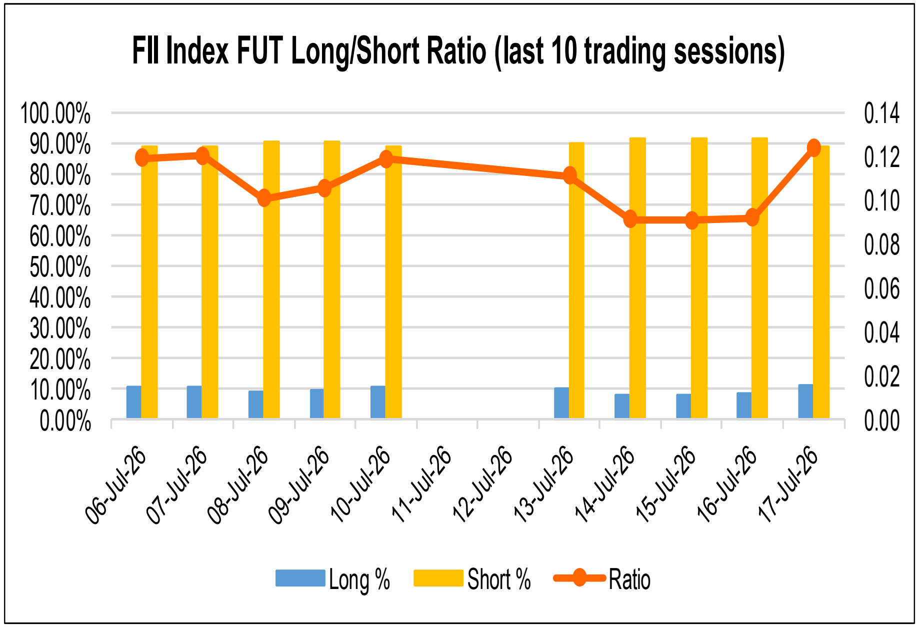
*INR in Crores

Cash Segment	17-Jul-2026	MTD	YTD
FII Net Flows	-376.41	-4,546.87	-3,50,290.70
DII Net Flows	1,017.89	21,074.01	4,91,211.17

*INR in Crores

FIIs F&O Flows	17-Jul-2026	MTD
Index Futures	5,392.98	6,250.23
Index Options	8,075.09	-90,529.64
Stock Futures	917.03	1,179.40
Stock Options	141.90	-1,287.63





INDEX VIEW

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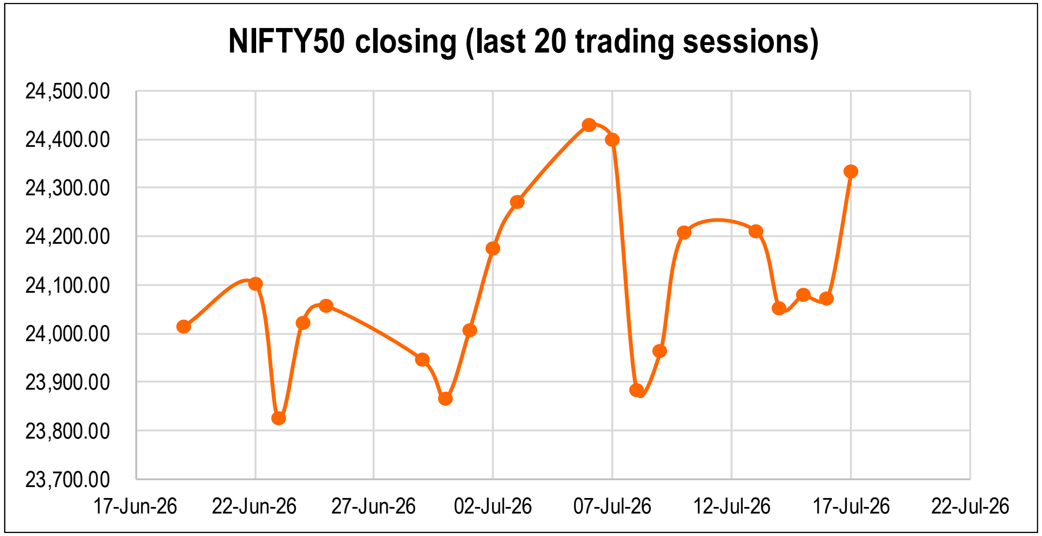
NIFTY	
Spot	24334.30
Futures	24321.70
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	1.13
Key Supply Zones	24600, 25150
Key Demand Zones	24200, 24000



BANK NIFTY	
Spot	58521.40
Futures	58533.80
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	58000
PCR (28th JULY)	1.01
Key Supply Zones	58700, 60500
Key Demand Zones	58200, 57500

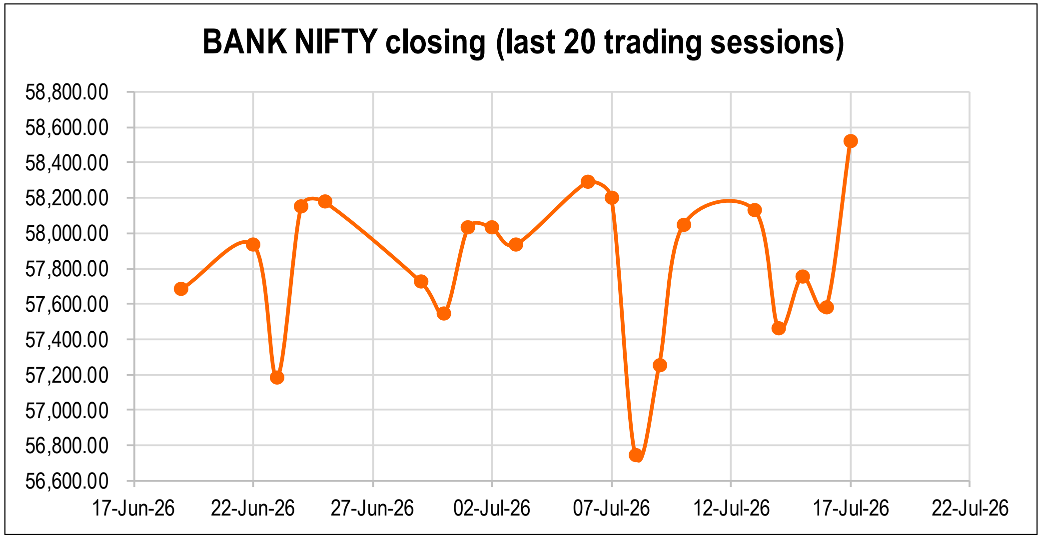


CHART OF THE DAY

Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
NIFTY_CONSR_DURBL	Bullish	39396.35	35400	41752 | 44125	Up to 3 months

STOCKS & SECTOR UPDATES

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Private Bank	28,508.50	2.12%	1.51%	2.21%	-0.74%
Nifty IT	29,226.60	1.75%	4.34%	6.56%	-22.85%
Nifty Bank	58,521.40	1.63%	0.82%	1.45%	-1.78%
Nifty Realty	918.70	1.38%	-2.12%	13.15%	4.64%
Nifty Financial Services	26,903.35	1.31%	0.27%	1.79%	-2.57%
Nifty Auto	27,099.75	1.24%	0.89%	1.94%	-3.87%
Nifty Oil & Gas	11,298.65	0.99%	1.08%	1.15%	-7.62%
Nifty FMCG	48,748.70	0.70%	-1.14%	-1.63%	-12.13%
Nifty Infrastructure	9,377.35	0.49%	-0.55%	-1.41%	-2.49%
Nifty PSU Bank	8,381.75	0.41%	-0.83%	-3.84%	-1.77%
Nifty Media	1,521.45	0.00%	2.50%	0.40%	5.31%
Nifty Energy	39,277.00	-0.17%	0.09%	-3.13%	11.19%
Nifty Consumer Durables	39,396.35	-0.30%	3.11%	5.80%	7.18%
Nifty Metal	12,436.95	-0.47%	-1.99%	-4.48%	11.37%
Nifty Healthcare	16,282.90	-1.28%	-0.34%	3.92%	11.22%
Nifty Pharma	25,645.00	-1.40%	-0.11%	4.84%	12.86%

Sector View

Nifty Oil & Gas Index witnessed a falling trendline breakout on Friday after finding support near 10,950 in recent sessions. The breakout signals a potential shift in short-term momentum towards the upside, with the index poised for a move towards the 11,600 level in the coming sessions.

Stocks in Bullish Momentum: BAJFINANCE, EXIDEIND.

Stocks in Bearish Momentum: NATIONALUM, BSE.

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	3160.70	0.30	3106.55	2932.68	2405.61
ADANIPORTS	1837.40	0.60	1824.55	1805.19	1556.38
APOLLOHOSP	8826.00	-0.70	8732.65	8438.14	7687.13
ASIANPAINT	2689.00	0.53	2685.13	2665.11	2568.97
AXISBANK	1328.50	1.60	1340.72	1308.60	1281.32
BAJAJ_AUTO	10443.00	1.08	10048.55	10223.25	9517.48
BAJAJFINSV	1854.00	0.84	1834.57	1783.04	1921.72
BAJFINANCE	1056.30	1.80	1008.30	952.37	969.77
BEL	409.45	0.58	414.68	416.42	420.58
BHARTIARTL	1908.80	-0.68	1899.24	1863.20	1950.79
CIPLA	1418.70	-0.76	1437.83	1405.33	1411.54
COALINDIA	427.65	0.07	435.55	450.36	424.07
DRREDDY	1211.20	-1.08	1303.33	1297.06	1265.58
EICHERMOT	7563.50	1.95	7417.07	7280.71	7203.67
ETERNAL	286.60	0.05	277.21	259.63	276.84
GRASIM	3109.70	1.20	3143.24	3095.86	2861.10
HCLTECH	1203.90	1.39	1136.08	1150.91	1421.29
HDFCBANK	819.60	1.40	805.15	780.02	885.78
HDFCLIFE	563.65	-0.70	573.61	585.13	679.32
HINDALCO	944.15	-1.58	967.81	1030.44	923.89
HINDUNILVR	2143.80	2.16	2158.61	2177.78	2296.88
ICICIBANK	1444.30	1.84	1392.62	1320.09	1345.27
INDIGO	5248.50	-0.32	5255.29	4794.48	4976.85
INFY	1096.50	1.30	1055.36	1121.04	1374.75
ITC	280.70	0.48	285.76	291.06	339.30

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	242.98	3.11	238.86	237.83	266.70
JSWSTEEL	1237.30	1.33	1237.71	1266.23	1202.37
KOTAKBANK	389.95	3.39	389.94	388.03	405.18
LT	3814.50	1.03	4019.17	3999.23	3957.57
M&M	3179.20	1.97	3118.74	3106.58	3376.16
MARUTI	13803.00	0.15	13838.80	13469.44	14724.34
MAXHEALTH	1089.90	-0.76	1110.39	1053.92	1060.53
NESTLEIND	1427.20	0.26	1429.50	1424.66	1308.30
NTPC	341.85	-0.18	353.39	367.76	356.74
ONGC	247.29	0.22	242.46	261.22	258.95
POWERGRID	283.55	1.00	285.80	290.83	286.01
RELIANCE	1327.20	2.36	1304.50	1321.49	1413.69
SBILIFE	1829.40	0.40	1804.86	1814.13	1919.41
SBIN	1044.30	1.27	1034.54	1004.45	1015.33
SHRIRAMFIN	1034.90	1.02	1033.33	980.02	925.32
SUNPHARMA	1932.60	-0.90	1898.13	1856.08	1755.88
TATACONSUM	1088.60	0.01	1103.55	1142.71	1142.98
TATASTEEL	185.89	0.22	189.53	200.71	190.39
TCS	2269.00	3.09	2108.04	2202.17	2726.60
TECHM	1572.90	4.14	1446.29	1449.78	1486.13
TITAN	4638.10	0.27	4478.42	4293.62	4079.16
TMPV	335.60	1.15	344.02	361.48	363.93
TRENT	2842.40	-0.62	3091.20	2923.24	2811.88
ULTRACEMCO	11727.00	-0.37	11528.70	11445.82	11821.86
WIPRO	176.00	-0.98	175.16	186.18	220.25

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Name of the Research Entity: BOB Capital Markets Limited
Registered office Address: 1704, B Wing, Parinee Crescenzo, G Block, BKC, Bandra East, Mumbai 400051
SEBI Research Analyst Registration No: INH000000040 (Perpetual)
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/
CIN: U65999MH1996GOI098009

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