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DAILY TECHNICAL & DERIVATIVES REPORT

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21st July, 2026

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,839.26	-307.16	-0.59%
S&P 500	7,443.28	-14.41	-0.19%
NASDAQ 100	28,604.24	11.58	0.04%
FTSE 100	10,524.76	-75.61	-0.71%
NIKKEI (8:00 AM)	65,398.00	1,256.88	1.96%
HANG SENG (8:00 AM)	25,127.50	-15.55	-0.06%
GOLD	4,035.87	19.97	0.50%
SILVER	57.46	0.39	0.68%
BRENT OIL	88.66	-0.56	-0.63%
DOLLAR INDEX	100.79	0.01	0.01%
USD/INR	96.62	0.18	0.18%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street's** three major indices ended lower on Monday as investors awaited earnings from major technology companies later this week while monitoring developments around potential de-escalation in the Middle East.
- **Asian equities** rebounded after three consecutive sessions of losses as the selloff in semiconductor stocks eased ahead of earnings from major technology companies.
- **Crude Oil** prices softened, earlier on Tuesday as markets weighed reports of mediation efforts between the U.S. and Iran against renewed attacks and threats of a naval blockade of Saudi Arabia by Yemen's Houthis.
- **GIFT Nifty** trading at ~24,162.00 is still indicating a negative bias for the Indian market on Tuesday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,238.50	-95.80	-0.39%
SENSEX	77,708.52	-442.93	-0.57%
BANK NIFTY	57,945.00	-576.40	-0.98%
FIN NIFTY	26,574.65	-328.70	-1.22%
MIDCAP NIFTY	14,779.70	64.30	0.44%
NIFTY SMLCAP 250	18,023.90	20.40	0.11%
INDIA VIX	12.90	-0.25	-1.90%

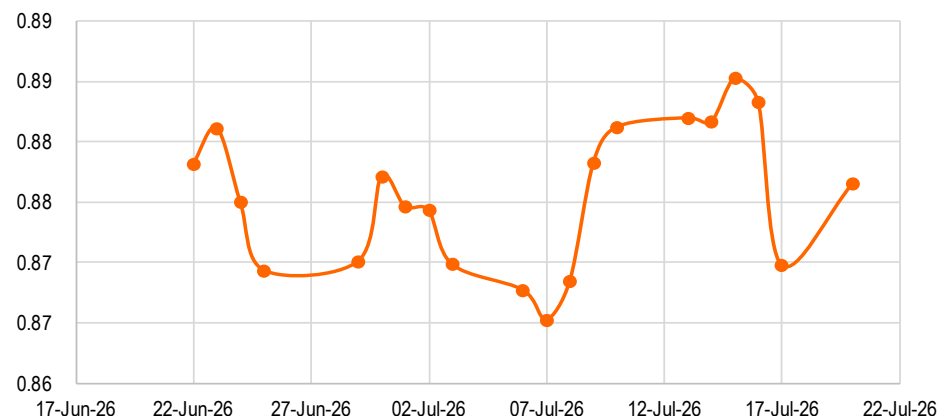
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	36	14	0
NIFTY 500	296	200	4
NIFTY F&O	148	62	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	30	60%
NIFTY 500	266	53%

Highlights

- Nifty recovered from a gap-down opening and successfully closed above the crucial 24,200 support zone, indicating buying interest at lower levels.
- Private banking heavyweights witnessed significant selling pressure, with HDFC Bank and Axis Bank declining by more than 5% each.
- With Nifty heading into the weekly expiry on Tuesday, volatility may remain elevated, particularly as the index trades near an important technical support level.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





Wanbury

The United States Food and Drug Administration (USFDA) conducted a routine current Good Manufacturing Practices (cGMP) inspection at the company's Andhra Pradesh facility from July 13 to July 17, 2026. At the conclusion of the inspection, the USFDA issued a Form 483 with six observations.

Redington

Redington announced a strategic distribution partnership with Resulticks, a global leader in real-time audience engagement solutions. The five-year collaboration is designed to accelerate the adoption of advanced, real-time customer engagement technologies across the Middle East, India, and South East and South Asia (SESA).

InterGlobe Aviation

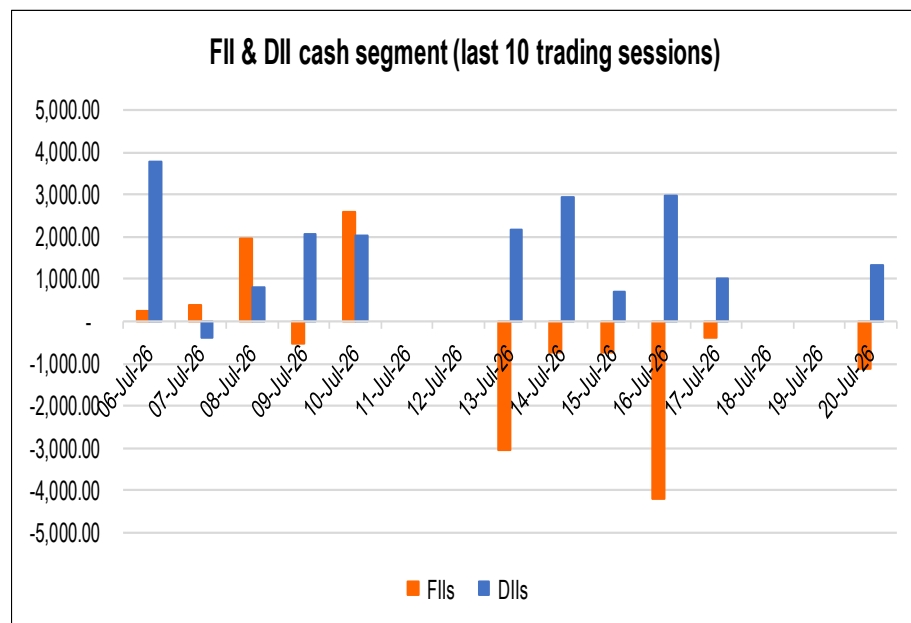
IndiGo has signed a Memorandum of Understanding (MoU) with CFM International for an order of more than 1,000 LEAP-1A engines to power 510 Airbus A320neo Family aircraft. This will be the largest single order ever placed for LEAP engines and a record for CFM International. The MoU also includes CFM's extensive support in establishing IndiGo's upcoming engine maintenance, repair, and overhaul (MRO) facility, as well as supporting IndiGo's rapidly growing fleet through a long-term material services agreement.



INSTITUTIONAL ACTIVITY

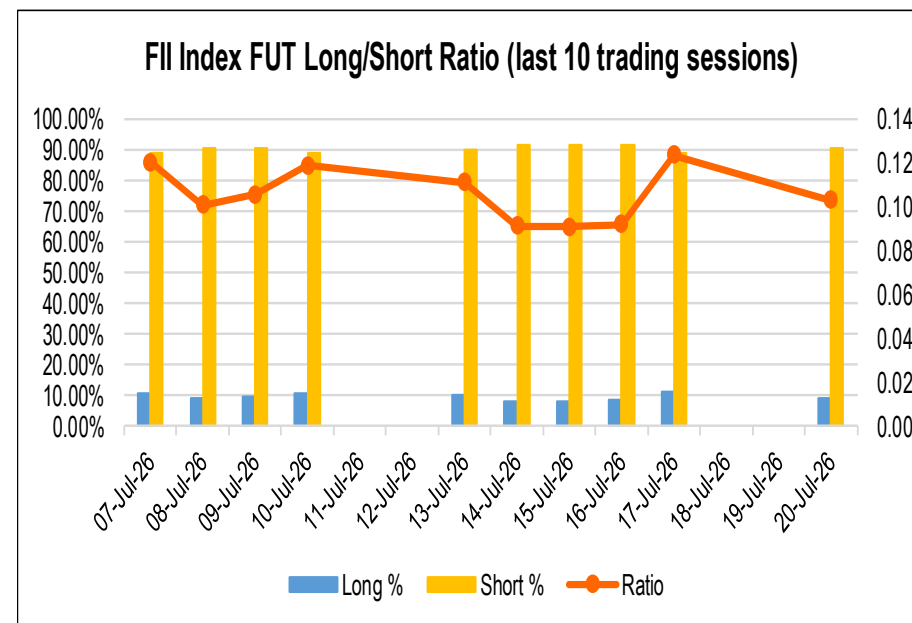
*INR in Crores

Cash Segment	20-Jul-2026	MTD	YTD
FII Net Flows	-1,121.04	-5,667.91	-3,51,411.74
DII Net Flows	1,312.03	22,386.04	4,92,523.20



*INR in Crores

FII's F&O Flows	20-Jul-2026	MTD
Index Futures	-631.78	5,618.45
Index Options	-9,944.49	-1,00,474.13
Stock Futures	445.98	1,625.38
Stock Options	230.79	-1,056.84



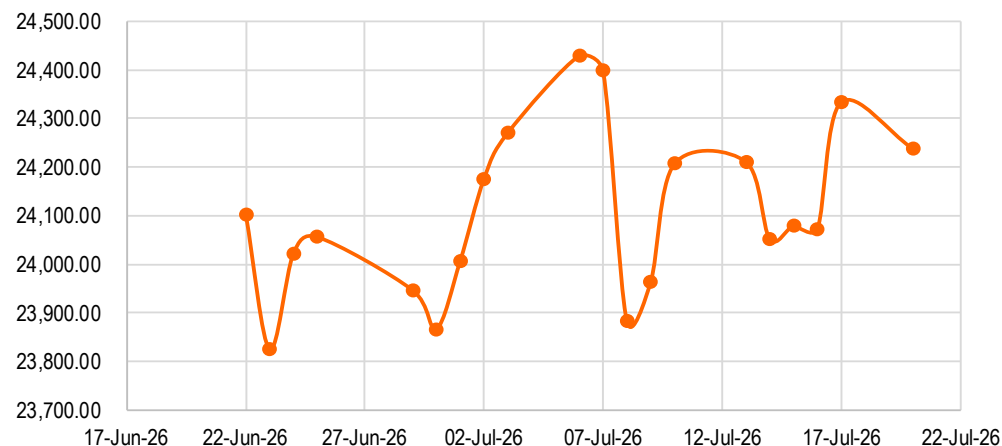


INDEX VIEW

NIFTY

Spot	24238.50
Futures	24259.50
Highest CE OI (28 th JULY)	25000
Highest PE OI (28 th JULY)	24000
PCR (28 th JULY)	1.08
Key Supply Zones	24600, 25150
Key Demand Zones	24200, 24000

NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	57945.00
Futures	58125.00
Highest CE OI (28 th JULY)	59000
Highest PE OI (28 th JULY)	58000
PCR (28 th JULY)	0.92
Key Supply Zones	58200, 58700
Key Demand Zones	57500, 56500

BANK NIFTY closing (last 20 trading sessions)

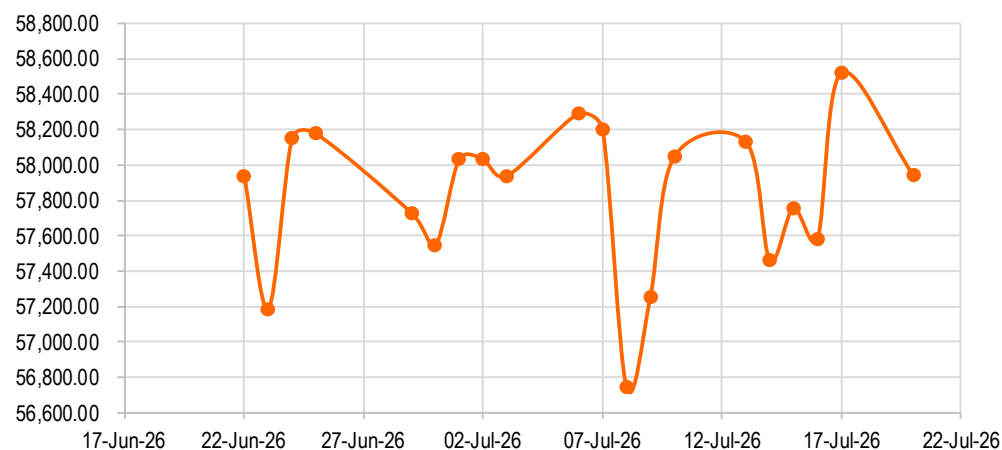




CHART OF THE DAY



Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
FLUOROCHEM	Bullish	4316.20	3790	4575 4800	Up to 3 months



STOCKS & SECTOR UPDATES

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty PSU Bank	8,615.10	2.78%	3.70%	-1.70%	0.96%
Nifty Pharma	26,003.15	1.40%	0.37%	5.01%	14.43%
Nifty Healthcare	16,489.75	1.27%	0.29%	4.15%	12.64%
Nifty Media	1,538.05	1.09%	1.82%	0.07%	6.46%
Nifty Energy	39,663.45	0.98%	1.17%	-2.72%	12.28%
Nifty Metal	12,543.75	0.86%	-1.06%	-4.18%	12.32%
Nifty Consumer Durables	39,681.05	0.72%	2.65%	7.15%	7.96%
Nifty Infrastructure	9,443.00	0.70%	0.99%	-1.13%	-1.80%
Nifty FMCG	49,067.45	0.65%	1.12%	-0.58%	-11.55%
Nifty Oil & Gas	11,369.05	0.62%	2.40%	0.85%	-7.05%
Nifty Realty	917.50	-0.13%	-0.13%	12.56%	4.50%
Nifty IT	29,161.85	-0.22%	1.52%	5.55%	-23.02%
Nifty Auto	27,028.35	-0.26%	1.81%	1.22%	-4.12%
Nifty Bank	57,945.00	-0.98%	0.84%	0.02%	-2.75%
Nifty Financial Services	26,574.65	-1.22%	0.14%	-0.04%	-3.76%
Nifty Private Bank	27,861.75	-2.27%	-0.19%	-0.42%	-2.99%

Sector View

Nifty Oil & Gas Index witnessed a falling trendline breakout last week 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: COLPAL, SOLARIND.

Stocks in Bearish Momentum: Nil.

Stocks in F&O ban list: KAYNES.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3183.30	0.72	3113.79	2946.07	2408.82
ADANIPTS	1844.00	0.36	1824.99	1807.41	1558.45
APOLLOHSP	8905.00	0.90	8753.43	8459.50	7693.43
ASIANPAINT	2691.40	0.09	2683.06	2668.32	2570.14
AXISBANK	1256.00	-5.46	1335.62	1307.87	1281.80
BAJAJ_AUTO	10522.50	0.76	10071.37	10221.60	9525.90
BAJAJFINSV	1861.50	0.40	1839.18	1783.78	1920.69
BAJFINANCE	1064.00	0.73	1013.41	954.19	969.94
BEL	408.15	-0.32	413.74	415.80	420.64
BHARTIARTL	1940.10	1.64	1900.70	1865.47	1950.83
CIPLA	1441.60	1.61	1442.32	1406.91	1411.06
COALINDIA	429.40	0.41	434.45	449.61	424.25
DRREDDY	1223.10	0.98	1300.88	1295.37	1265.20
EICHERMOT	7563.50	0.00	7414.70	7285.43	7206.43
ETERNAL	286.95	0.12	278.34	260.22	276.59
GRASIM	3143.80	1.10	3142.95	3099.53	2862.78
HCLTECH	1221.30	1.45	1140.56	1151.67	1420.18
HDFCBANK	777.60	-5.12	805.04	779.66	884.92
HDFCLIFE	564.65	0.18	572.25	583.91	678.29
HINDALCO	947.80	0.39	964.70	1028.28	924.92
HINDUNILVR	2139.70	-0.19	2155.87	2175.13	2295.03
ICICIBANK	1460.20	1.10	1398.30	1323.72	1345.65
INDIGO	5229.00	-0.37	5265.67	4808.92	4974.57
INFY	1087.10	-0.86	1057.15	1119.53	1372.71
ITC	282.70	0.71	285.27	290.56	338.71

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	238.92	-1.67	238.58	237.59	266.36
JSWSTEEL	1257.00	1.59	1236.17	1265.70	1202.91
KOTAKBANK	382.05	-2.03	389.08	388.08	405.06
LT	3838.80	0.64	4000.64	3995.55	3958.39
M&M	3165.50	-0.43	3123.28	3102.47	3374.11
MARUTI	13514.00	-2.09	13844.75	13464.32	14710.66
MAXHEALTH	1102.40	1.15	1110.77	1055.66	1060.38
NESTLEIND	1446.30	1.34	1431.08	1424.06	1309.64
NTPC	347.25	1.58	352.46	366.70	356.74
ONGC	249.58	0.93	242.62	260.53	259.01
POWERGRID	288.70	1.82	285.62	290.33	285.99
RELIANCE	1323.10	-0.31	1305.18	1319.23	1413.39
SBILIFE	1824.50	-0.27	1806.08	1813.18	1919.44
SBIN	1060.00	1.50	1035.79	1003.81	1016.30
SHRIRAMFIN	1035.40	0.05	1035.00	980.41	927.37
SUNPHARMA	1956.40	1.23	1904.03	1858.52	1757.53
TATACONSUM	1091.90	0.30	1102.57	1141.51	1142.74
TATASTEEL	186.41	0.28	188.90	200.09	190.46
TCS	2251.10	-0.79	2114.34	2199.17	2722.68
TECHM	1576.40	0.22	1454.63	1452.34	1486.75
TITAN	4643.40	0.11	4489.60	4300.34	4085.29
TMPV	336.45	0.25	342.87	361.03	363.55
TRENT	2925.90	2.94	3077.21	2924.50	2810.19
ULTRACEMCO	11903.00	1.50	11555.50	11440.96	11820.30
WIPRO	176.38	0.22	174.94	185.76	219.91



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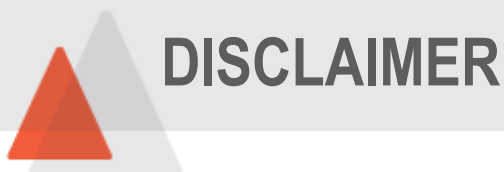
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