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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	54,036.93	151.83	0.28%
S&P 500	7,757.64	47.68	0.62%
NASDAQ 100	29,722.30	348.97	1.19%
FTSE 100	10,901.09	33.20	0.31%
NIKKIE (8:00 AM)	66,920.00	1,313.29	2.00%
HANG SENG (8:00 AM)	25,834.00	165.97	0.65%
GOLD	4,389.62	-10.08	-0.23%
SILVER	63.76	0.26	0.41%
BRENT OIL	84.26	0.71	0.85%
DOLLAR INDEX	99.56	0.14	0.14%
USD/INR	95.18	-0.02	-0.02%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. markets** ended higher on Friday, with the S&P 500 closing at a record high after weaker-than-expected jobs data reduced expectations of a near-term Federal Reserve rate hike and capped a strong week for the major indices. **Asian markets** followed Wall Street higher on Monday as softer U.S. employment data supported risk appetite. However, the lack of progress in Gulf peace talks kept investors cautious.

- **Crude oil** prices advanced as uncertainty persisted over the reopening of the Strait of Hormuz. Iran indicated that a deal with Oman to establish new shipping lanes was nearing completion but maintained that additional conditions must be met by the U.S.

- **GIFT Nifty** trading at ~24,670.50 is indicating a muted start for the Indian market on Monday.

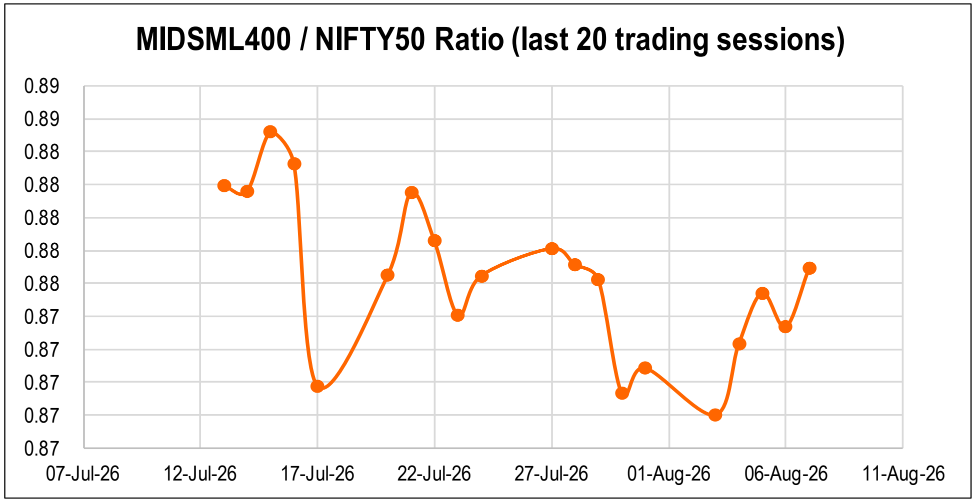
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,570.65	-65.35	-0.27%
SENSEX	78,499.17	-455.59	-0.58%
BANK NIFTY	57,746.45	-317.20	-0.55%
FIN NIFTY	26,466.00	-397.50	-1.48%
MIDCAP NIFTY	14,875.00	62.40	0.42%
NIFTY SMLCAP 250	18,356.55	-2.10	-0.01%
INDIA VIX	12.16	-0.00	-0.02%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	24	26	0
NIFTY 500	232	263	5
NIFTY F&O	105	99	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	34	68%
NIFTY 500	318	64%

Highlights

- Nifty opened with a gap down and attempted a recovery, but failed to sustain most of its intraday gains.
- TCS led the Nifty gainers with a 3.36% rise, followed by Grasim Industries, which gained 3.20%.
- Strength in select IT and heavyweight stocks provided support, although the broader price action remained cautious.



Emcure Pharmaceuticals

The company has received the Establishment Inspection Report (EIR) from the USFDA for its formulations facility in Sanand, Gujarat. The USFDA has classified the inspection status of the facility as Voluntary Action Indicated (VAI) and, accordingly, the inspection stands closed. The USFDA had conducted an inspection of the facility from May 6 to May 15, 2026.

NMDC

The company has fixed the lump ore price at Rs 5,250 per tonne and the fines price at Rs 4,500 per tonne, effective August 8.

RITES, Hindustan Petroleum Corporation

RITES has signed a Memorandum of Understanding (MoU) with Hindustan Petroleum Corporation (HPCL) to provide consultancy services for the development of railway siding infrastructure across HPCL's facilities.

Vedanta Aluminium Metal

The company's subsidiary, Bharat Aluminium Company (BALCO), has been declared the preferred bidder for the Karlapat Bauxite Block. The Karlapat Bauxite Block is at the G2 level of exploration, with a total area of 1,822.61 hectares and estimated mineral reserves of around 248 million tonnes.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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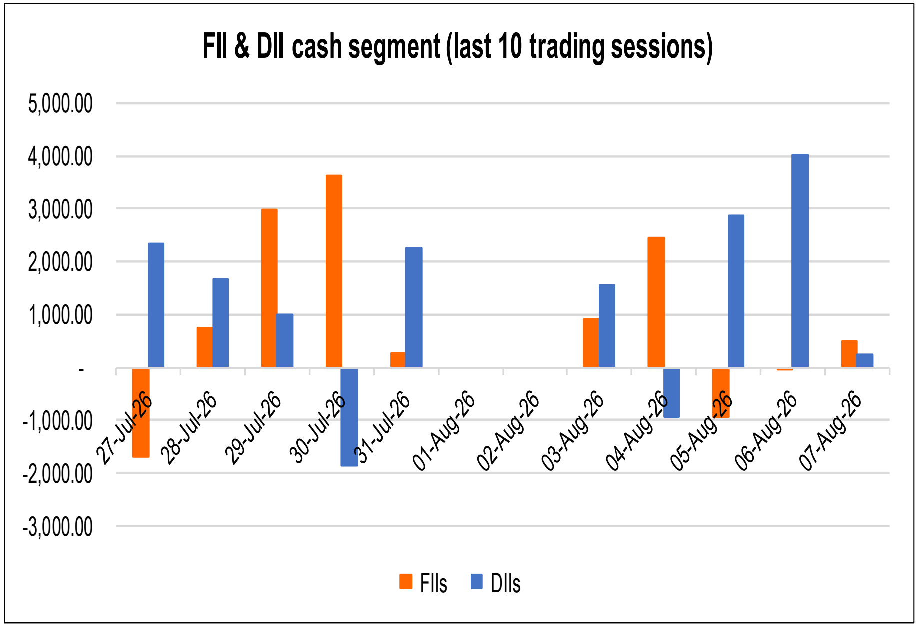
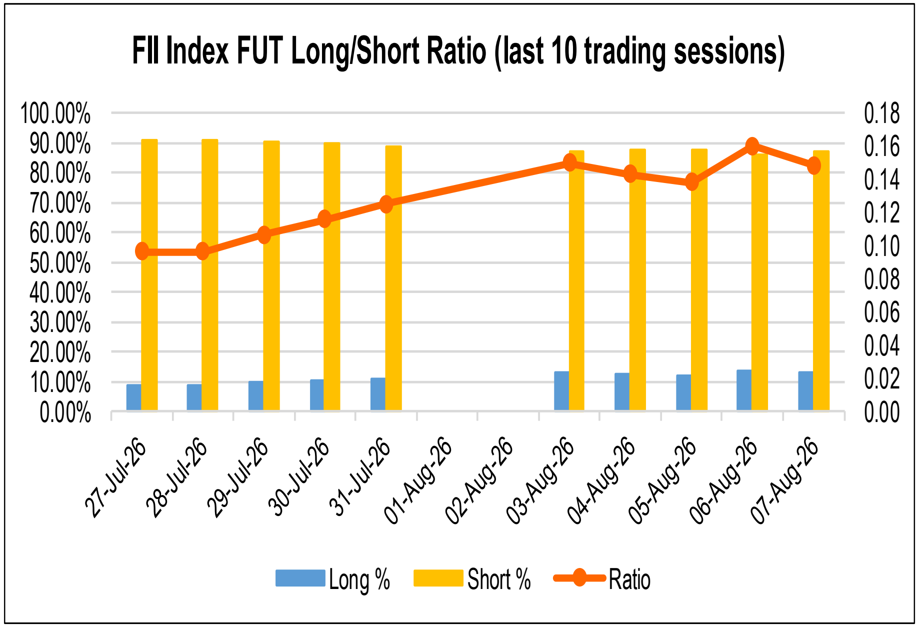
*INR in Crores

Cash Segment	7-Aug-2026	MTD	YTD
FII Net Flows	480.24	2,887.69	-348,635.13
DII Net Flows	235.56	7,767.37	5,13,003.78

*INR in Crores

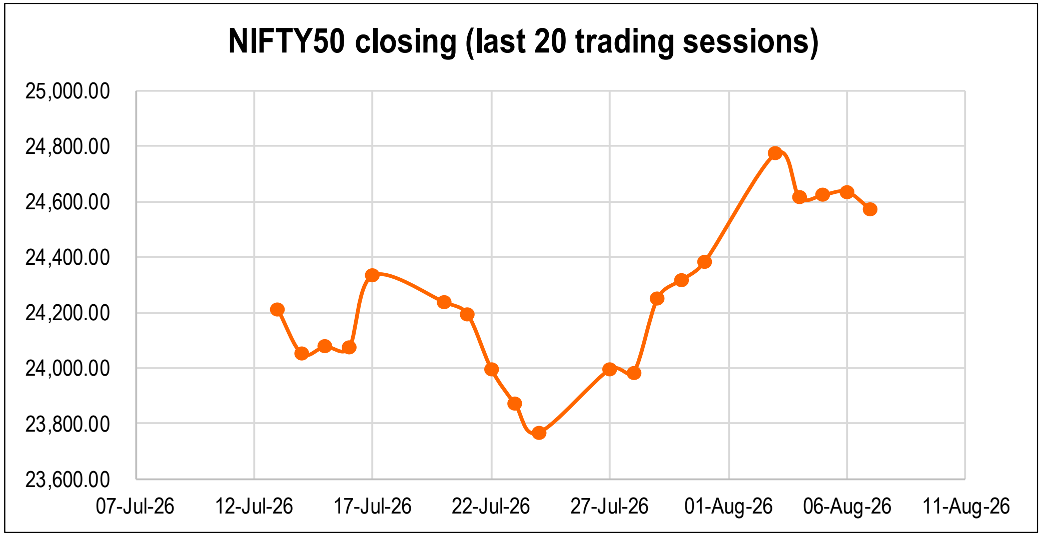
FIIs F&O Flows	7-Aug-2026	MTD
Index Futures	-818.33	3,730.09
Index Options	-3,221.15	6,023.22
Stock Futures	-140.32	-1,326.22
Stock Options	-1,164.42	-1,233.54



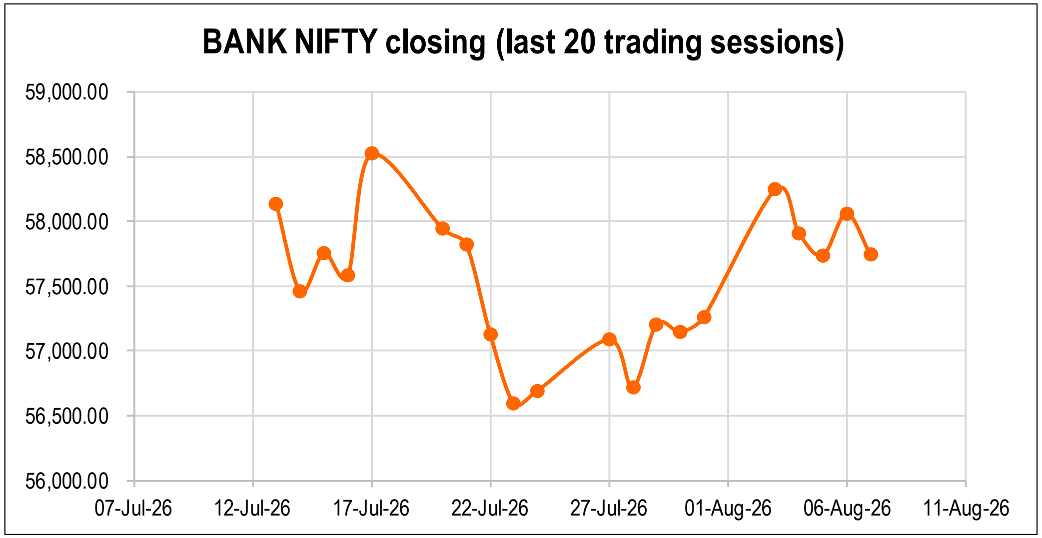


INDEX VIEW

NIFTY	
Spot	24570.65
Futures	24655.00
Highest CE OI (25th AUG)	25000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.09
Key Supply Zones	24800, 25000
Key Demand Zones	24400, 24200



BANK NIFTY	
Spot	57746.45
Futures	58020.20
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.88
Key Supply Zones	58600, 59000
Key Demand Zones	57400, 56800



STOCKS & SECTOR UPDATES

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Auto	29,647.90	1.84%	1.64%	10.38%	5.17%
Nifty IT	31,547.70	1.42%	-0.53%	12.63%	-16.73%
Nifty PSU Bank	8,786.20	0.65%	3.53%	3.96%	2.97%
Nifty Infrastructure	9,504.15	0.54%	-0.04%	0.79%	-1.17%
Nifty Metal	13,189.85	0.50%	2.13%	3.95%	18.11%
Nifty Energy	38,749.85	0.17%	-0.48%	-1.25%	9.69%
Nifty FMCG	49,435.20	0.13%	-1.06%	0.25%	-10.89%
Nifty Healthcare	16,708.90	0.07%	-0.44%	2.27%	14.13%
Nifty Oil & Gas	11,312.20	0.07%	-0.40%	1.21%	-7.51%
Nifty Media	1,554.95	0.00%	-0.87%	4.76%	7.63%
Nifty Pharma	26,541.80	-0.09%	-0.45%	3.38%	16.80%
Nifty Realty	885.95	-0.10%	-2.97%	-5.61%	0.91%
Nifty Bank	57,746.45	-0.55%	-0.86%	-0.52%	-3.08%
Nifty Consumer Durables	40,089.90	-0.72%	-1.32%	4.92%	9.07%
Nifty Private Bank	27,392.35	-1.04%	-2.33%	-2.46%	-4.63%
Nifty Financial Services	26,466.00	-1.48%	-1.92%	-1.36%	-4.15%

Sector View

Nifty Auto Index continued to display strong momentum, forming a Bullish Marubozu on the daily chart and marking a fresh all-time high at 29,647.90. The price action confirms sustained buying interest and reinforces the prevailing bullish trend.

Stocks to watch

AUROPHARMA, BHARATFORG, GRASIM, HINDALCO.

Stocks in F&O ban list

BANDHANBNK, KAYNES, LICI.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3020.00	-0.20	3085.76	3046.83	2449.55
ADANIPORTS	1693.50	-0.09	1765.17	1796.82	1581.39
APOLLOHOSP	8945.00	-0.33	8904.70	8673.89	7785.06
ASIANPAINT	2735.00	-0.73	2712.17	2701.92	2596.86
AXISBANK	1238.00	-1.43	1260.74	1300.64	1286.73
BAJAJ_AUTO	11662.00	0.36	11068.42	10470.24	9703.62
BAJAJFINSV	2008.90	-3.70	1940.49	1841.06	1917.33
BAJFINANCE	1078.00	-5.84	1070.99	1000.23	975.11
BEL	401.00	0.45	400.70	408.35	419.97
BHARTIARTL	1959.90	0.61	1938.32	1889.93	1952.40
CIPLA	1463.80	-0.89	1442.28	1423.44	1405.82
COALINDIA	415.25	-0.08	422.29	438.35	426.64
DRREDDY	1172.00	0.09	1183.44	1254.53	1259.43
EICHERMOT	8020.00	0.66	7714.32	7493.07	7268.82
ETERNAL	315.00	-0.40	297.89	276.11	274.15
GRASIM	3323.00	3.20	3146.54	3137.93	2889.00
HCLTECH	1356.60	1.62	1280.40	1195.26	1411.65
HDFCBANK	731.00	-0.45	763.68	773.71	869.28
HDFCLIFE	540.00	-0.46	554.60	566.49	663.86
HINDALCO	1059.60	3.17	973.92	1000.85	940.04
HINDUNILVR	2096.00	0.79	2117.94	2141.03	2269.56
ICICIBANK	1421.00	-2.50	1437.72	1376.13	1350.66
INDIGO	5333.00	0.27	5233.50	5056.50	4943.36
INFY	1175.10	0.87	1111.95	1109.18	1348.11
ITC	286.10	0.07	282.94	284.84	330.52

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	256.80	-2.39	245.51	240.79	262.50
JSWSTEEL	1299.50	-0.64	1264.39	1263.64	1211.58
KOTAKBANK	390.75	-0.82	387.31	389.63	403.04
LT	4056.00	-0.14	3893.39	3987.91	3971.70
M&M	3502.00	2.82	3260.30	3150.46	3364.13
MARUTI	14037.00	-0.31	13819.05	13664.72	14555.72
MAXHEALTH	1070.00	-0.22	1094.61	1071.67	1057.59
NESTLEIND	1540.00	0.33	1476.45	1439.64	1331.96
NTPC	342.50	-0.72	346.64	353.93	357.29
ONGC	238.85	0.44	244.59	247.07	259.01
POWERGRID	271.60	0.31	284.06	285.50	285.87
RELIANCE	1334.80	0.74	1297.44	1300.74	1407.82
SBILIFE	1855.50	-0.32	1860.33	1813.63	1924.31
SBIN	1097.20	1.12	1037.01	1023.73	1028.02
SHRIRAMFIN	1115.00	-2.28	1054.76	1014.00	956.37
SUNPHARMA	1945.00	-0.31	1957.50	1887.17	1780.44
TATACONSUM	1082.30	-0.71	1092.82	1107.34	1140.44
TATASTEEL	187.55	-0.92	187.08	193.05	191.58
TCS	2452.70	3.36	2316.45	2213.48	2680.49
TECHM	1635.00	0.17	1589.43	1506.57	1499.37
TITAN	4941.00	-1.14	4769.40	4492.68	4181.68
TMPV	347.00	0.48	335.89	354.52	358.28
TRENT	2997.00	-3.54	2954.14	2984.20	2799.50
ULTRACEMCO	12105.00	0.25	11904.00	11546.90	11810.08
WIPRO	187.53	0.76	180.53	181.77	215.62

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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
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