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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	53,975.98	-60.95	-0.11%
S&P 500	7,753.11	-4.53	-0.06%
NASDAQ 100	29,621.80	-100.50	-0.34%
FTSE 100	10,862.50	-38.59	-0.35%
NIKKIE (8:00 AM)	66,970.22	1,363.51	2.08%
HANG SENG (8:00 AM)	25,865.50	-71.99	-0.28%
GOLD	4,486.75	67.05	1.52%
SILVER	66.43	1.16	1.77%
BRENT OIL	87.79	0.07	0.08%
DOLLAR INDEX	99.71	0.00	0.00%
USD/INR	95.38	0.08	0.08%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **The Nasdaq** and **S&P 500** closed lower on Monday, dragged by declines in Intel and other semiconductor stocks as optimism over a deal to reopen the Strait of Hormuz faded. **Asian markets** traded mixed on Tuesday, tracking Wall Street's cautious tone as investors awaited key U.S. inflation data. Elevated crude oil prices and ongoing geopolitical tensions continued to weigh on risk appetite.

- **Gold** extended its gains for a third consecutive session, touching a more than two-month high, as investors looked to upcoming U.S. inflation data for clues on the Federal Reserve's interest-rate trajectory.

- **GIFT Nifty** trading at ~24,613.00 is indicating a muted start for the Indian market on Tuesday.

MARKET SNAPSHOT

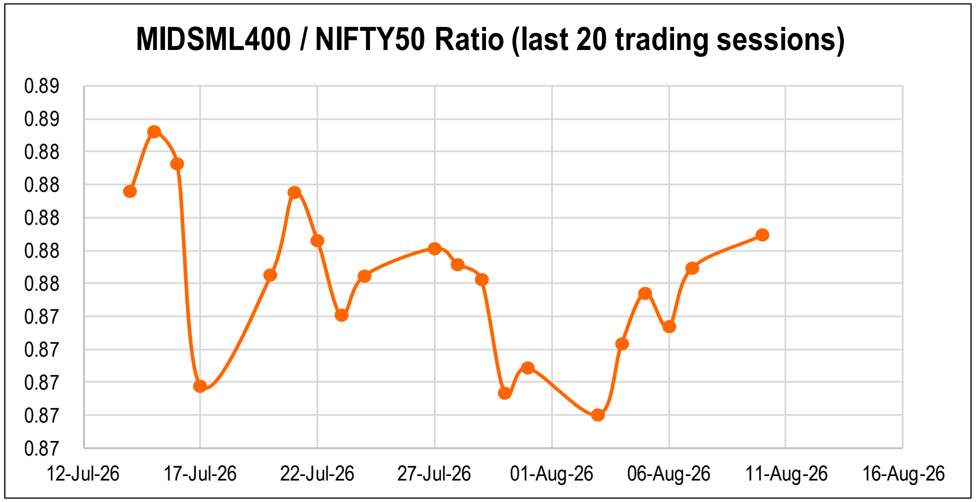
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,583.80	13.15	0.05%
SENSEX	78,542.44	43.27	0.06%
BANK NIFTY	57,686.95	-59.50	-0.10%
FIN NIFTY	26,545.30	79.30	0.30%
MIDCAP NIFTY	14,960.60	85.60	0.58%
NIFTY SMLCAP 250	18,345.55	-11.00	-0.06%
INDIA VIX	12.22	0.07	0.53%

Highlights

- Nifty consolidated within a narrow 25,500–25,625 range and closed flat, indicating a pause after the recent bullish momentum.
- Titan continued to display strong momentum, gaining 3.02% and emerging as Nifty's top gainer, while SBI declined 2.39% to lead the losers.
- The upcoming weekly expiry could result in increased volatility as traders positions around key option strikes.

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	25	23	2
NIFTY 500	238	255	7
NIFTY F&O	108	96	4

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	34	68%
NIFTY 500	309	62%



Lupin

The company has received approval from the US Food and Drug Administration (US FDA) for Sodium Zirconium Cyclosilicate for oral suspension, 5 g/packet and 10 g/packet. The drug is bioequivalent to the reference listed drug (RLD), Lokelma for oral suspension, manufactured by AstraZeneca Pharmaceuticals LP, and is indicated for the treatment of hyperkalemia in adults. Sodium Zirconium Cyclosilicate for oral suspension had estimated annual sales of $568 million in the US, according to IQVIA MAT data for June 2026.

Bharat Electronics

BEL has secured additional orders worth Rs 541 crore since July 31. Major orders received include communication equipment, electro-optics, ammunition fuzes, Chemical, Biological, Radiological and Nuclear (CBRN) systems, spares and services.

JSW Energy

The company has announced the addition of 1,166 MW of renewable capacity since April 2026. With this addition, it has already surpassed 94 percent of its total organic capacity addition achieved in FY26..

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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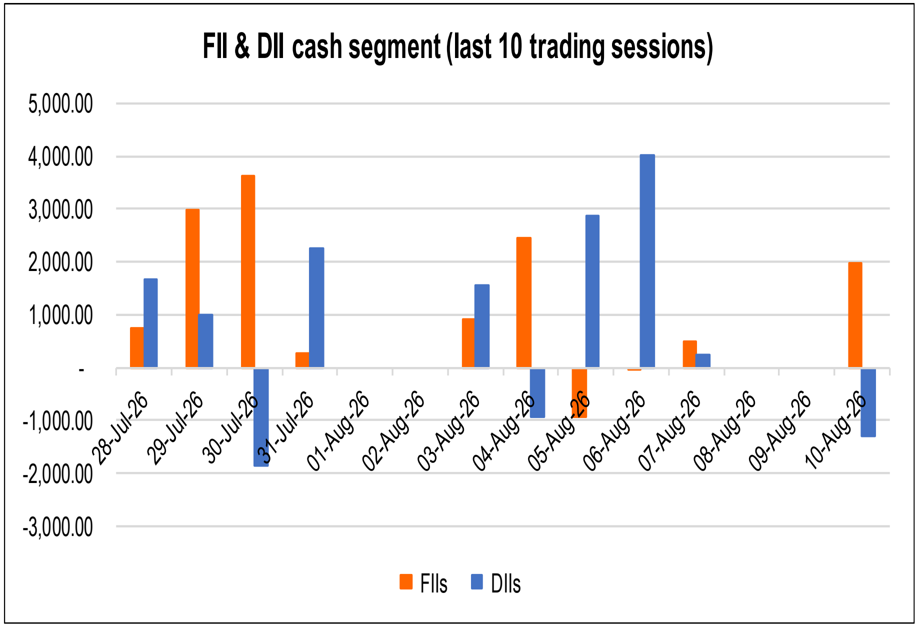
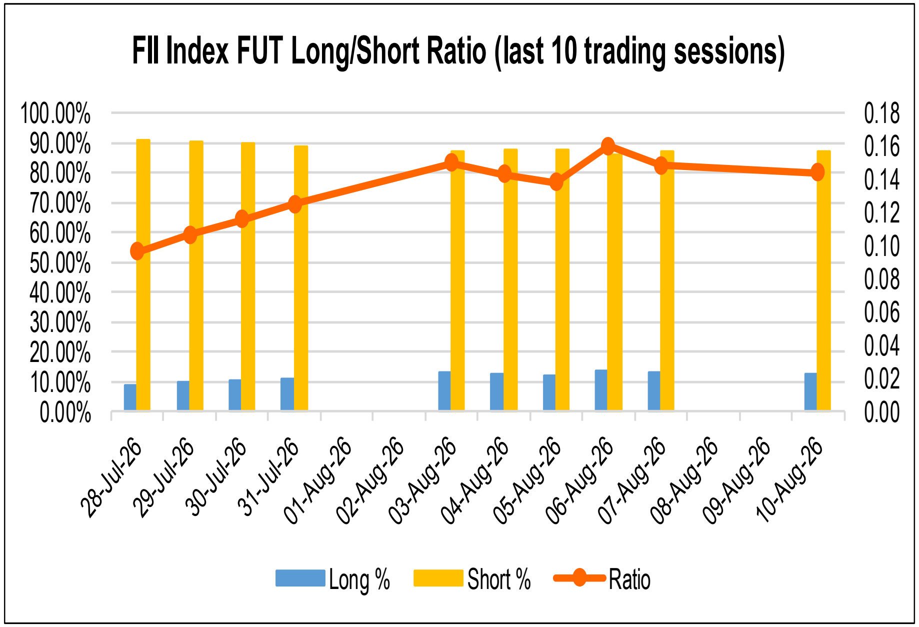
*INR in Crores

Cash Segment	10-Aug-2026	MTD	YTD
FII Net Flows	1,974.76	4,862.45	-3,46,660.37
DII Net Flows	-1,290.29	6,477.08	5,11,713.49

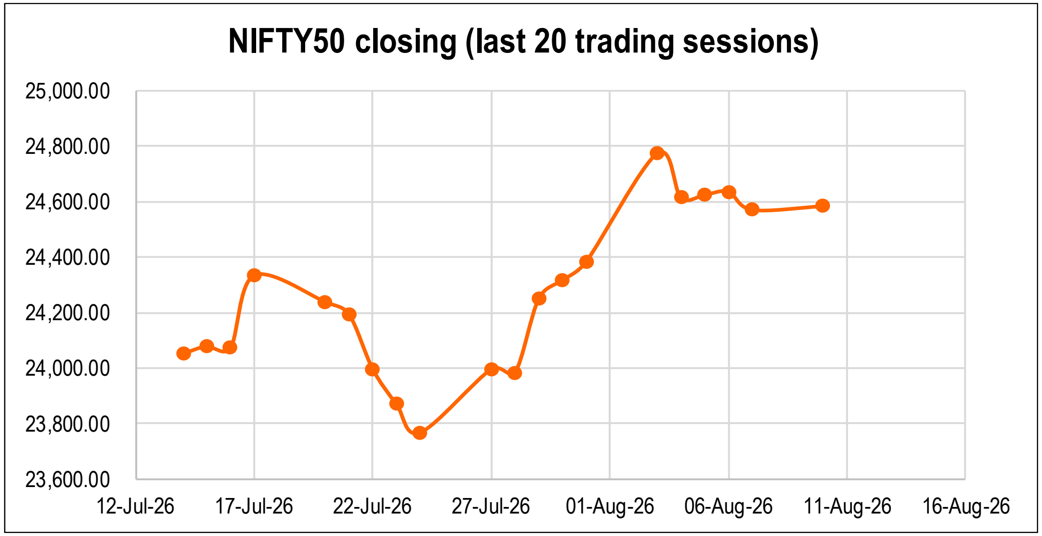
*INR in Crores

FIIs F&O Flows	10-Aug-2026	MTD
Index Futures	-353.52	3,376.57
Index Options	3,925.22	9,948.44
Stock Futures	-597.19	-1,923.41
Stock Options	-430.67	-1,664.21

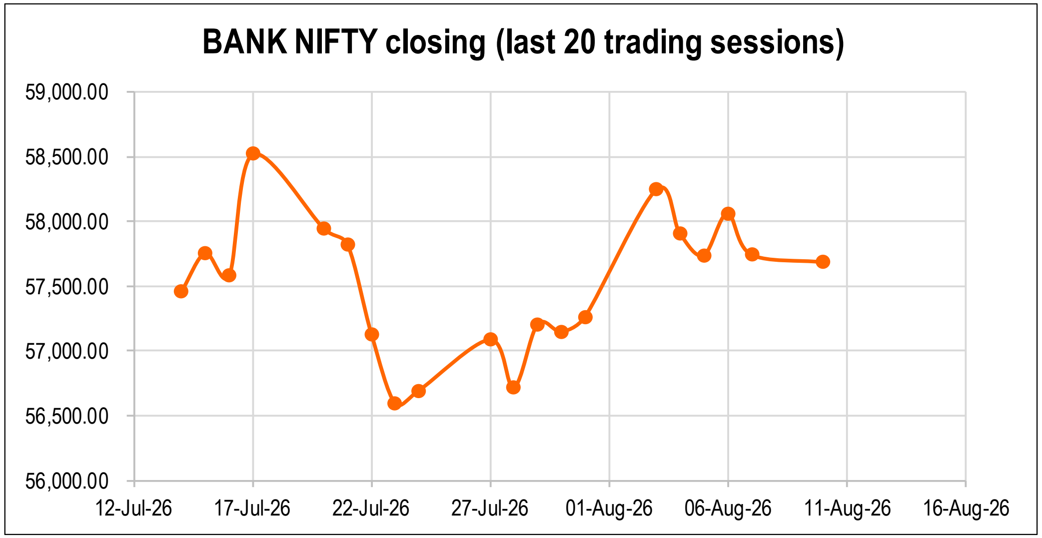




NIFTY	
Spot	24583.80
Futures	24659.70
Highest CE OI (25th AUG)	25000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.11
Key Supply Zones	24700, 25000
Key Demand Zones	24400, 24200



BANK NIFTY	
Spot	57686.95
Futures	57872.60
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.85
Key Supply Zones	58600, 59000
Key Demand Zones	57400, 56800



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Realty	897.95	1.35%	0.76%	-4.33%	2.28%
Nifty Private Bank	27,534.30	0.52%	-1.17%	-1.96%	-4.13%
Nifty Consumer Durables	40,240.95	0.38%	-0.16%	5.32%	9.48%
Nifty Financial Services	26,545.30	0.30%	-1.12%	-1.07%	-3.87%
Nifty Media	1,559.45	0.29%	-2.56%	5.06%	7.94%
Nifty Metal	13,226.70	0.28%	1.49%	4.24%	18.44%
Nifty IT	31,631.45	0.27%	0.56%	12.93%	-16.50%
Nifty Energy	38,748.15	0.00%	-0.18%	-1.26%	9.69%
Nifty Auto	29,620.05	-0.09%	1.99%	10.27%	5.07%
Nifty Bank	57,686.95	-0.10%	-0.38%	-0.62%	-3.18%
Nifty FMCG	49,363.60	-0.14%	-0.33%	0.11%	-11.02%
Nifty Pharma	26,479.55	-0.23%	-0.44%	3.14%	16.53%
Nifty Healthcare	16,650.95	-0.35%	-0.57%	1.92%	13.74%
Nifty Oil & Gas	11,270.45	-0.37%	0.39%	0.83%	-7.85%
Nifty Infrastructure	9,465.85	-0.40%	0.49%	0.39%	-1.57%
Nifty PSU Bank	8,639.80	-1.67%	1.89%	2.23%	1.25%

Sector View

Nifty PSU Bank Index faced a rejection near the recent swing high of 8,800, forming a Bearish Engulfing pattern on the daily chart. The setup indicates potential exhaustion in buying momentum and raises the possibility of an extended pullback, with 8,400 emerging as the key support zone.

Stocks to watch

DLF, JSWENERGY, MCX, TATACONSUM.

Stocks in F&O ban list

BANDHANBNK, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3010.00	-0.33	3077.38	3048.28	2452.20
ADANIPORTS	1681.00	-0.74	1758.71	1794.35	1582.40
APOLLOHOSP	8912.00	-0.37	8911.18	8688.60	7790.45
ASIANPAINT	2750.00	0.55	2717.06	2703.48	2598.57
AXISBANK	1247.30	0.75	1257.13	1299.85	1286.98
BAJAJ_AUTO	11677.00	0.13	11133.22	10494.58	9716.24
BAJAJFINSV	2021.30	0.62	1946.15	1845.81	1916.99
BAJFINANCE	1102.20	2.24	1074.97	1004.11	975.30
BEL	404.35	0.84	400.38	408.22	419.93
BHARTIARTL	1943.00	-0.86	1940.38	1892.21	1952.28
CIPLA	1467.70	0.27	1444.33	1424.77	1405.31
COALINDIA	411.00	-1.02	421.33	437.41	426.76
DRREDDY	1158.80	-1.13	1179.66	1251.64	1259.03
EICHERMOT	7975.00	-0.56	7748.25	7509.03	7273.76
ETERNAL	310.25	-1.51	299.14	277.30	273.97
GRASIM	3380.50	1.73	3158.35	3143.10	2891.61
HCLTECH	1357.20	0.04	1287.20	1198.73	1410.86
HDFCBANK	731.00	0.00	759.33	773.44	867.97
HDFCLIFE	540.00	0.00	552.93	565.39	662.85
HINDALCO	1054.05	-0.52	978.28	999.40	941.41
HINDUNILVR	2087.20	-0.42	2115.77	2139.70	2267.39
ICICIBANK	1431.80	0.76	1438.83	1379.64	1350.73
INDIGO	5333.50	0.01	5238.70	5075.07	4940.62
INFY	1183.00	0.67	1115.97	1109.62	1346.67
ITC	282.65	-1.21	283.09	284.76	329.90

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	254.00	-1.09	246.14	241.09	262.21
JSWSTEEL	1302.00	0.19	1267.62	1264.12	1212.23
KOTAKBANK	393.50	0.70	387.75	389.82	402.80
LT	4080.00	0.59	3900.97	3987.98	3972.79
M&M	3517.00	0.43	3278.13	3159.89	3363.91
MARUTI	14097.00	0.43	13839.15	13684.12	14544.71
MAXHEALTH	1069.00	-0.09	1092.75	1073.75	1057.06
NESTLEIND	1528.60	-0.74	1481.53	1441.79	1333.22
NTPC	340.45	-0.60	346.07	353.00	357.29
ONGC	239.84	0.41	244.16	246.56	258.97
POWERGRID	270.10	-0.55	283.27	285.09	285.77
RELIANCE	1327.30	-0.56	1298.96	1300.87	1407.46
SBILIFE	1855.00	-0.03	1860.28	1814.13	1924.41
SBIN	1071.00	-2.39	1038.71	1025.86	1028.94
SHRIRAMFIN	1137.80	2.04	1059.25	1017.82	958.70
SUNPHARMA	1944.40	-0.03	1958.65	1890.08	1781.87
TATACONSUM	1108.70	2.44	1093.32	1105.95	1140.24
TATASTEEL	190.24	1.43	187.24	192.69	191.66
TCS	2425.70	-1.10	2328.66	2216.81	2677.77
TECHM	1640.00	0.31	1596.21	1509.69	1500.25
TITAN	5090.00	3.02	4793.83	4512.99	4188.93
TMPV	347.10	0.03	336.13	353.59	358.03
TRENT	3025.00	0.93	2960.38	2988.38	2798.65
ULTRACEMCO	12038.00	-0.55	11927.35	11558.02	11808.48
WIPRO	185.50	-1.08	180.88	181.39	215.28

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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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