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TRUST | INNOVATION | EXCELLENCE

# DAILY TECHNICAL & DERIVATIVES REPORT

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**Shantanu Vartak** | Shantanu.Vartak@bobcaps.in

Research Analyst.

# MACRO PULSE

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| GLOBAL SCRIPS | LTP | CHANGE | % CHG |
|---|---|---|---|
| DJIA | 53,839.99 | 69.72 | 0.13% |
| S&P 500 | 7,798.99 | 50.49 | 0.65% |
| NASDAQ 100 | 30,084.50 | 341.90 | 1.15% |
| FTSE 100 | 10,772.67 | -60.48 | -0.56% |
| NIKKIE (8:00 AM) | 68,881.50 | 572.91 | 0.84% |
| HANG SENG (8:00 AM) | 25,145.00 | -251.51 | -0.99% |
| GOLD | 4,373.25 | -47.15 | -1.07% |
| SILVER | 64.17 | -0.82 | -1.27% |
| BRENT OIL | 86.66 | -0.41 | -0.47% |
| DOLLAR INDEX | 99.80 | -0.06 | -0.06% |
| USD/INR | 95.38 | -0.06 | -0.06% |

*Closed

*Source: investing.com, moneycontrol.com

## Global updates

- **The S&P 500** closed at a record high on Thursday, supported by gains in Sandisk and other heavyweight technology stocks. Moderating U.S. producer-price inflation further strengthened expectations that the Federal Reserve will keep interest rates unchanged at its September meeting.

- **Asian markets** extended their gains on Friday, with technology stocks leading the rally as softer U.S. inflation data reinforced expectations of stable interest rates and supported risk appetite.

- **GIFT Nifty** trading at ~24,431.00 is indicating a negative opening for the Indian market on Friday.

# MARKET SNAPSHOT

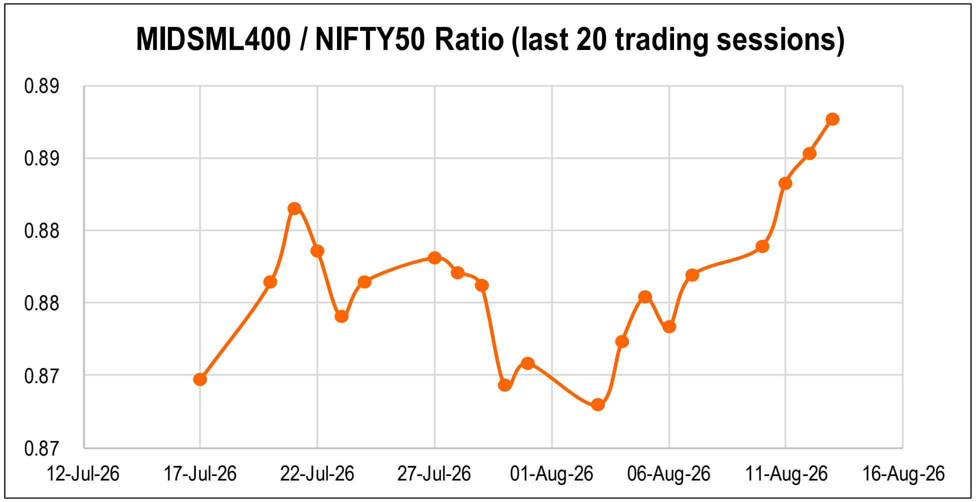
| INDIAN INDICES | LTP | CHANGE | % CHG |
|---|---|---|---|
| NIFTY 50 | 24,395.85 | -40.10 | -0.16% |
| SENSEX | 78,079.96 | 113.61 | 0.15% |
| BANK NIFTY | 57,635.25 | -250.60 | -0.43% |
| FIN NIFTY | 26,327.95 | -98.80 | -0.37% |
| MIDCAP NIFTY | 15,078.15 | 45.50 | 0.30% |
| NIFTY SMLCAP 250 | 18,365.90 | 30.25 | 0.16% |
| INDIA VIX | 11.38 | -0.31 | -2.67% |

| INDEX | ADVANCE | DECLINE | UNCHANGED |
|---|---|---|---|
| NIFTY 50 | 28 | 22 | 0 |
| NIFTY 500 | 248 | 244 | 8 |
| NIFTY F&O | 100 | 102 | 6 |

| INDEX | SCRIPS ABOVE 50 DSMA | % |
|---|---|---|
| NIFTY 50 | 31 | 62% |
| NIFTY 500 | 287 | 57% |

## Highlights

- Nifty remained range-bound on Thursday and declined marginally by 40 points, indicating continued consolidation.
- Metal and cement stocks faced selling pressure, with Hindalco, UltraTech Cement and Grasim among the top five Nifty losers.
- India VIX at 11.41 reflects relatively subdued volatility and limited expectations of a sharp near-term move. The broader market continues to lack a clear directional trigger, keeping the near-term setup in consolidation mode with sectoral rotation and stock-specific opportunities likely to remain in focus.



**Aditya Birla Real Estate**

The company's subsidiary, Birla Estates, announced its entry into the Navi Mumbai market with the redevelopment of Shiv Sai Co-operative Housing Society in Vashi, undertaken jointly with an affiliate of Priyanka Group. The project has a total revenue potential of approximately Rs 2,600 crore.

*Source: moneycontrol.com

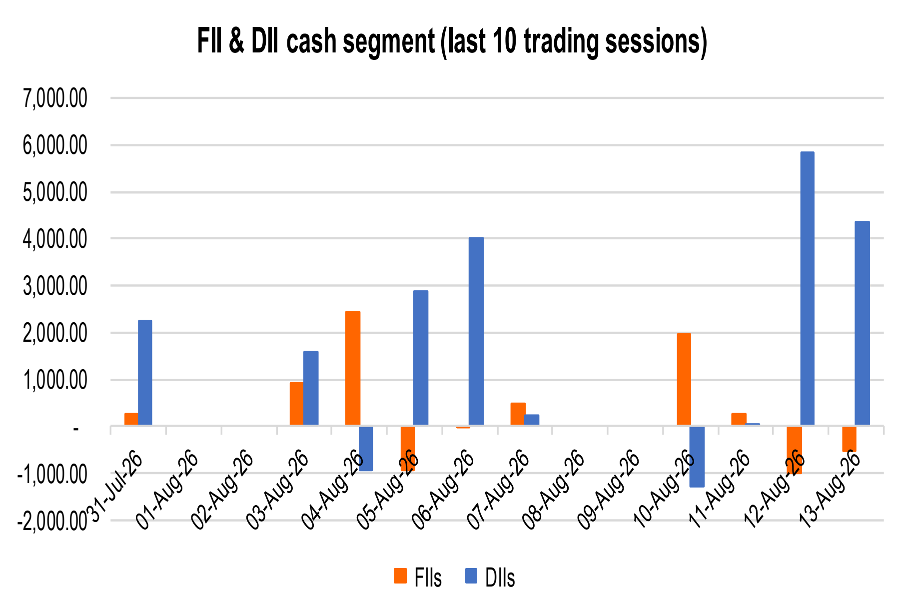
# INSTITUTIONAL ACTIVITY

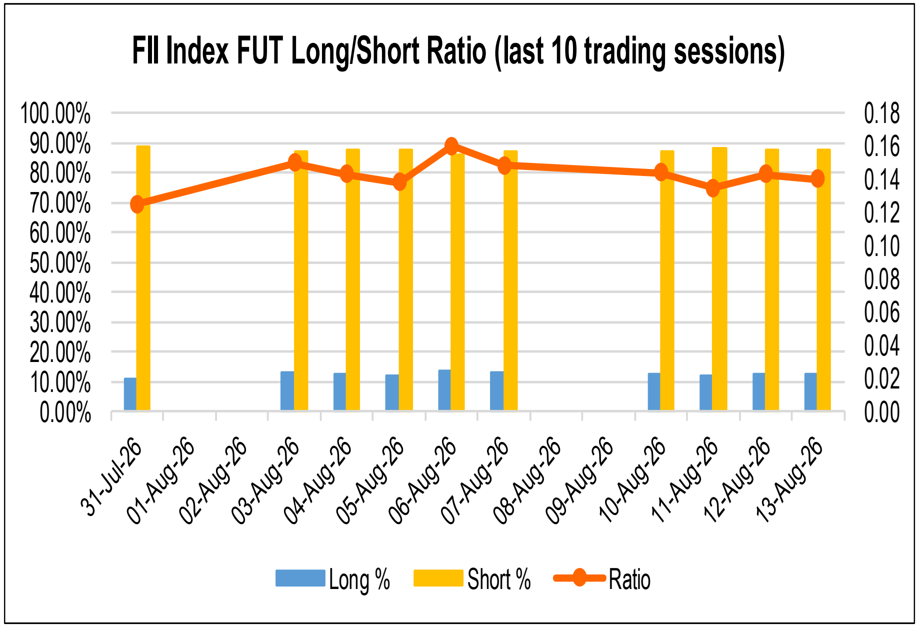
*INR in Crores

| Cash Segment | 13-Aug-2026 | MTD | YTD |
|---|---|---|---|
| **FII Net Flows** | -510.69 | 3,607.81 | -3,47,915.01 |
| **DII Net Flows** | 4,353.09 | 16,696.60 | 5,21,933.01 |

*INR in Crores

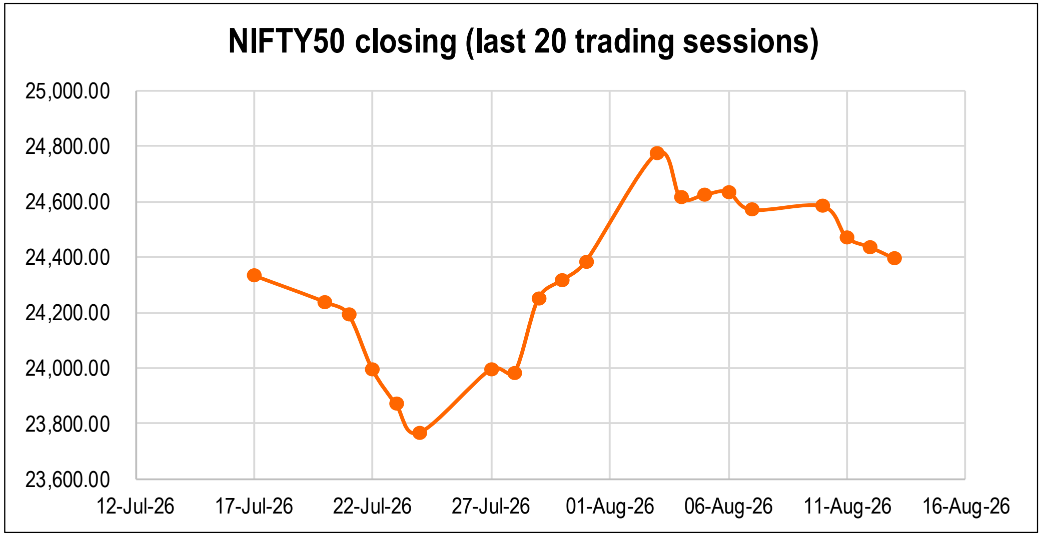
| FIIs F&O Flows | 13-Aug-2026 | MTD |
|---|---|---|
| Index Futures | -569.5 | 776.85 |
| Index Options | -13,538.28 | -31,133.95 |
| Stock Futures | 360.85 | -1,435.29 |
| Stock Options | -403.1 | -3,025.50 |



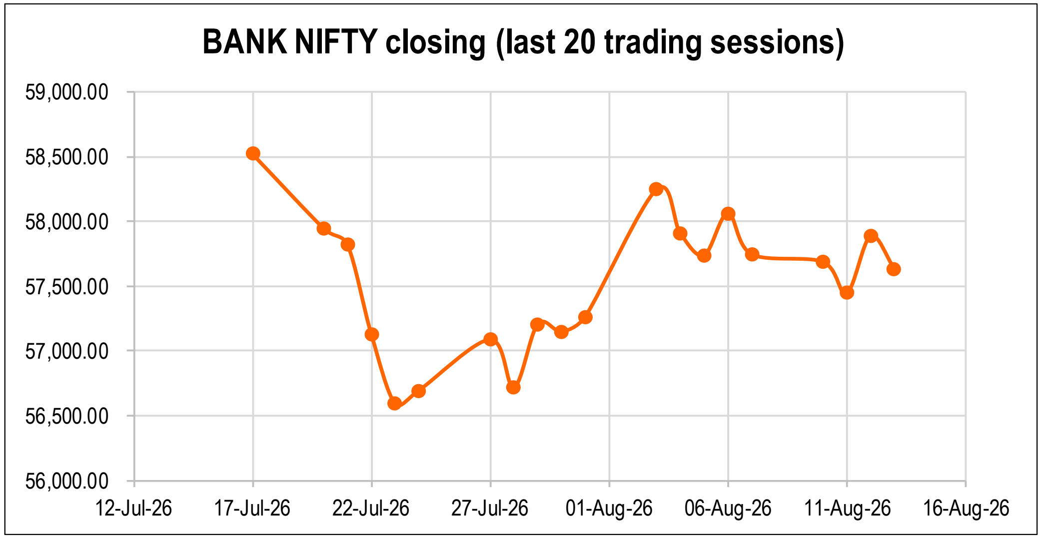



# INDEX VIEW

| NIFTY | |
|---|---|
| Spot | 24395.85 |
| Futures | 24468.00 |
| Highest CE OI (25th AUG) | 25000 |
| Highest PE OI (25th AUG) | 24000 |
| PCR (25th AUG) | 1.01 |
| Key Supply Zones | 24700, 25000 |
| Key Demand Zones | 24200, 24000 |




| BANK NIFTY | |
|---|---|
| Spot | 57635.25 |
| Futures | 57861.40 |
| Highest CE OI (25th AUG) | 58000 |
| Highest PE OI (25th AUG) | 58000 |
| PCR (25th AUG) | 0.86 |
| Key Supply Zones | 58600, 59000 |
| Key Demand Zones | 57400, 56800 |



| Index | LTP | 1 Day | 1 Week | 1 Month | YTD |
|---|---|---|---|---|---|
| Nifty Realty | 898.40 | 0.97% | 1.41% | -1.83% | 2.33% |
| Nifty FMCG | 48,837.30 | 0.84% | -1.21% | 1.14% | -11.97% |
| Nifty Consumer Durables | 40,304.80 | 0.45% | 0.54% | 3.51% | 9.66% |
| Nifty IT | 31,453.90 | 0.39% | -0.30% | 10.24% | -16.97% |
| Nifty Media | 1,574.95 | 0.37% | 1.29% | 4.74% | 9.02% |
| Nifty Auto | 29,392.15 | 0.10% | -0.86% | 10.31% | 4.27% |
| Nifty Infrastructure | 9,393.15 | -0.18% | -1.17% | 0.59% | -2.32% |
| Nifty Energy | 38,690.25 | -0.22% | -0.15% | -1.75% | 9.52% |
| Nifty Pharma | 26,686.80 | -0.28% | 0.55% | 2.63% | 17.44% |
| Nifty Healthcare | 16,581.85 | -0.30% | -0.76% | 0.45% | 13.26% |
| Nifty PSU Bank | 8,788.95 | -0.32% | 0.03% | 4.79% | 3.00% |
| Nifty Financial Services | 26,327.95 | -0.37% | -0.52% | -1.37% | -4.65% |
| Nifty Oil & Gas | 11,252.55 | -0.37% | -0.53% | 0.66% | -8.00% |
| Nifty Bank | 57,635.25 | -0.43% | -0.19% | -0.21% | -3.27% |
| Nifty Private Bank | 27,260.55 | -0.54% | -0.48% | -2.65% | -5.09% |
| Nifty Metal | 13,033.75 | -1.05% | -1.18% | 3.96% | 16.71% |

## Sector View

**Nifty Defence** Index broke above its previous all-time high of 9,784.60, closing near the day's high and confirming a fresh bullish breakout. The index has gained strong momentum after reversing from its 50-day SMA support last week. The prevailing technical structure remains positive, with the uptrend likely to extend further over the coming weeks.

## Stocks to watch

BDL, CONCOR, OBEROIRLTY, SOLARIND.

## Stocks in F&O ban list

BANDHANBNK, LICI, MANAPPURAM, SAIL.

# KEY MOVING AVERAGES (NIFTY50 STOCKS)

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| Symbol | LTP | %Change | 20 DSMA | 50 DSMA | 200 DSMA |
|---|---|---|---|---|---|
| ADANIENT | 2964.90 | -0.70 | 3050.14 | 3051.14 | 2459.84 |
| ADANIPORTS | 1658.00 | -0.42 | 1734.40 | 1786.13 | 1585.26 |
| APOLLOHOSP | 8600.00 | 0.03 | 8872.43 | 8717.78 | 7800.57 |
| ASIANPAINT | 2755.50 | 0.57 | 2729.33 | 2708.99 | 2602.08 |
| AXISBANK | 1221.80 | -0.67 | 1244.34 | 1297.84 | 1287.07 |
| BAJAJ_AUTO | 11661.00 | -0.33 | 11346.10 | 10577.82 | 9754.67 |
| BAJAJFINSV | 2025.00 | 0.22 | 1972.16 | 1862.67 | 1915.41 |
| BAJFINANCE | 1090.80 | -0.31 | 1085.61 | 1016.72 | 975.50 |
| BEL | 410.50 | 1.18 | 400.07 | 408.23 | 419.81 |
| BHARTIARTL | 1939.10 | -0.30 | 1941.52 | 1899.22 | 1950.74 |
| CIPLA | 1458.80 | -0.29 | 1448.29 | 1429.57 | 1402.83 |
| COALINDIA | 410.50 | 0.29 | 418.68 | 433.72 | 427.07 |
| DRREDDY | 1206.00 | 0.50 | 1175.20 | 1247.31 | 1257.95 |
| EICHERMOT | 8100.00 | 0.63 | 7850.57 | 7564.57 | 7289.13 |
| ETERNAL | 318.00 | 1.26 | 303.28 | 281.39 | 273.62 |
| GRASIM | 3257.00 | -1.54 | 3189.09 | 3154.80 | 2898.24 |
| HCLTECH | 1370.00 | 0.34 | 1316.13 | 1208.39 | 1409.02 |
| HDFCBANK | 725.00 | -0.55 | 746.82 | 772.21 | 863.82 |
| HDFCLIFE | 538.05 | 0.20 | 548.91 | 562.80 | 659.74 |
| HINDALCO | 1046.25 | -2.99 | 992.51 | 994.35 | 945.55 |
| HINDUNILVR | 2092.00 | 1.41 | 2110.71 | 2138.73 | 2260.14 |
| ICICIBANK | 1406.80 | -1.74 | 1440.13 | 1390.83 | 1351.03 |
| INDIGO | 5370.00 | 0.69 | 5260.83 | 5126.18 | 4932.08 |
| INFY | 1175.00 | -0.09 | 1130.48 | 1106.54 | 1342.50 |
| ITC | 278.50 | 0.85 | 283.20 | 284.63 | 327.88 |

| Symbol | LTP | %Change | 20 DSMA | 50 DSMA | 200 DSMA |
|---|---|---|---|---|---|
| JIOFIN | 255.60 | -0.18 | 248.95 | 242.23 | 261.38 |
| JSWSTEEL | 1275.00 | 0.46 | 1274.22 | 1262.20 | 1214.06 |
| KOTAKBANK | 392.40 | 0.49 | 389.83 | 390.58 | 402.06 |
| LT | 4070.70 | 1.26 | 3936.96 | 3991.24 | 3975.43 |
| M&M | 3428.20 | 0.72 | 3328.03 | 3186.13 | 3361.03 |
| MARUTI | 13905.00 | 0.22 | 13884.90 | 13739.28 | 14507.46 |
| MAXHEALTH | 1013.30 | 0.58 | 1081.10 | 1077.91 | 1054.28 |
| NESTLEIND | 1506.90 | -0.01 | 1493.13 | 1448.29 | 1336.44 |
| NTPC | 344.25 | 1.41 | 345.43 | 351.19 | 357.27 |
| ONGC | 239.90 | 0.36 | 242.94 | 244.99 | 258.84 |
| POWERGRID | 266.60 | -1.06 | 281.09 | 284.10 | 285.45 |
| RELIANCE | 1317.00 | -0.90 | 1303.20 | 1301.31 | 1405.57 |
| SBILIFE | 1812.00 | -0.98 | 1857.82 | 1815.75 | 1924.18 |
| SBIN | 1083.00 | 0.09 | 1046.42 | 1032.86 | 1031.57 |
| SHRIRAMFIN | 1132.30 | 1.35 | 1074.62 | 1030.53 | 965.27 |
| SUNPHARMA | 1932.00 | -0.62 | 1957.34 | 1898.94 | 1785.67 |
| TATACONSUM | 1090.50 | 2.69 | 1091.26 | 1101.71 | 1138.81 |
| TATASTEEL | 184.85 | -0.73 | 187.25 | 191.22 | 191.88 |
| TCS | 2375.00 | 1.08 | 2357.64 | 2220.50 | 2668.70 |
| TECHM | 1639.00 | 0.86 | 1616.89 | 1516.09 | 1503.08 |
| TITAN | 5063.70 | -0.69 | 4869.42 | 4574.97 | 4209.68 |
| TMPV | 349.60 | 1.92 | 338.24 | 350.93 | 357.24 |
| TRENT | 2990.00 | 0.10 | 2979.38 | 2999.58 | 2795.51 |
| ULTRACEMCO | 11706.00 | -1.56 | 11942.25 | 11595.60 | 11800.08 |
| WIPRO | 183.10 | -0.46 | 181.99 | 180.02 | 214.42 |

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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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