DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,224.64	385.38	0.74%
S&P 500	7,509.20	65.92	0.89%
NASDAQ 100	29,155.18	550.94	1.93%
FTSE 100	10,585.91	61.15	0.58%
NIKKIE (8:00 AM)	67,335.00	1,102.81	1.67%
HANG SENG (8:00 AM)	24,961.00	-171.29	-0.68%
GOLD	4,131.57	55.17	1.35%
SILVER	60.07	0.96	1.62%
BRENT OIL	91.85	0.84	0.92%
DOLLAR INDEX	100.97	-0.03	-0.03%
USD/INR	96.50	0.27	0.28%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street's** major indices closed higher on Tuesday, led by the Nasdaq, as a sharp rally in semiconductor stocks helped investors look past renewed Middle East tensions and tariff-related concerns. Market participants also remained focused on upcoming earnings reports from major technology companies.

- **Asian equities** extended their gains for a second consecutive session, with chipmakers continuing their rebound and driving renewed optimism around the artificial intelligence theme.

- **GIFT Nifty** trading at ~24,108.00 is indicating a negative bias for the Indian market on Wednesday.

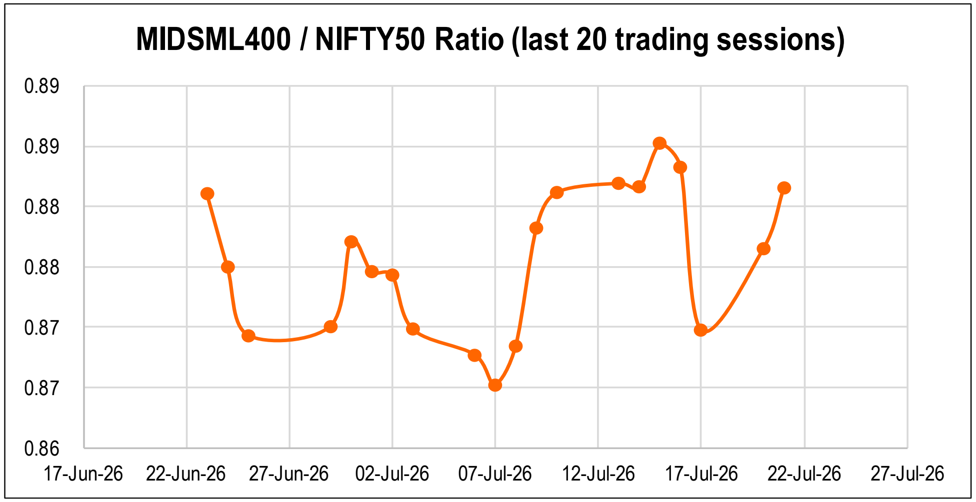
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,193.15	-45.35	-0.19%
SENSEX	77,470.11	-238.41	-0.31%
BANK NIFTY	57,817.60	-127.40	-0.22%
FIN NIFTY	26,538.95	-35.70	-0.13%
MIDCAP NIFTY	14,812.85	33.15	0.22%
NIFTY SMLCAP 250	18,107.00	83.10	0.46%
INDIA VIX	12.54	-0.44	-3.41%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	33	17	0
NIFTY 500	279	220	1
NIFTY F&O	121	89	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	30	60%
NIFTY 500	274	55%

Highlights

- Nifty remained range-bound with a bearish bias on the weekly expiry as selling pressure continued to weigh on the index.
- Weakness in HDFC Bank, Dr. Reddy's Laboratories and Reliance Industries added pressure to the benchmark.
- The 24,200 strike emerged as a key battleground, with the highest OI concentrated on both the Call and Put sides. The setup suggests strong positional congestion and indicates that Nifty may remain choppy around current levels.



Maruti Suzuki India

Due to the continuous increase in input costs, the company has decided to increase the prices of its models across the portfolio by up to Rs 30,000. The price hike will come into effect in August 2026.

Anant Raj

The company has announced a proposal for strategic restructuring following the approval of a Composite Scheme of Arrangement by its Board. The scheme, subject to approval by the National Company Law Tribunal (NCLT), will create two focused listed companies by separating the Group's rapidly growing data centre and cloud services business from its core real estate and infrastructure business.

Aditya Birla Capital

The company has made an investment of Rs 123.89 crore, on a rights basis, in the equity shares of its associate, Aditya Birla Health Insurance Company. Following this investment, there will be no change in Aditya Birla Capital's percentage shareholding, and Aditya Birla Health Insurance Company will continue to remain an associate of the company.

Aurobindo Pharma

The company's subsidiary, CuraTeQ Biologics, has received approval from ANVISA (Agência Nacional de Vigilância Sanitária), Brazil's National Health Surveillance Agency, for its biosimilars manufacturing facility in Hyderabad. The facility underwent a Good Manufacturing Practice (GMP) inspection by ANVISA from May 11 to May 15, 2026, and the approval was granted following the successful completion of the inspection for biological APIs and sterile products.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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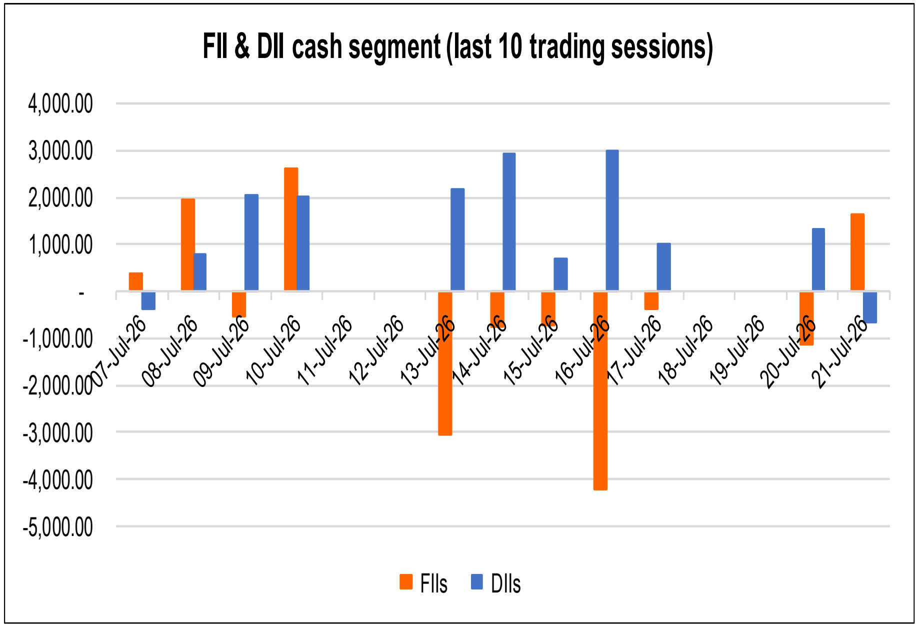
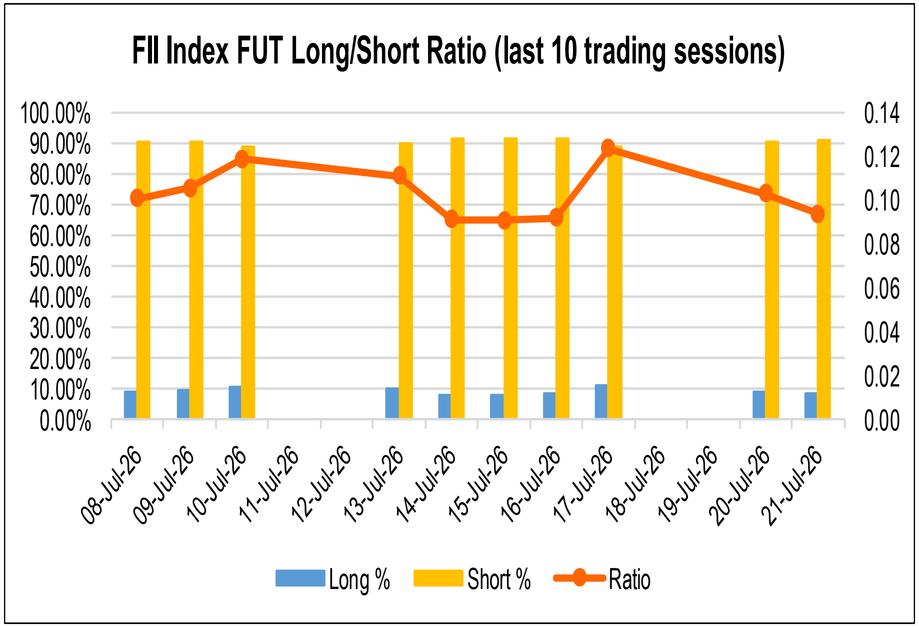
*INR in Crores

Cash Segment	21-Jul-2026	MTD	YTD
FII Net Flows	1,650.16	-4,017.75	-3,49,761.58
DII Net Flows	-656.88	21,729.16	4,91,866.32

*INR in Crores

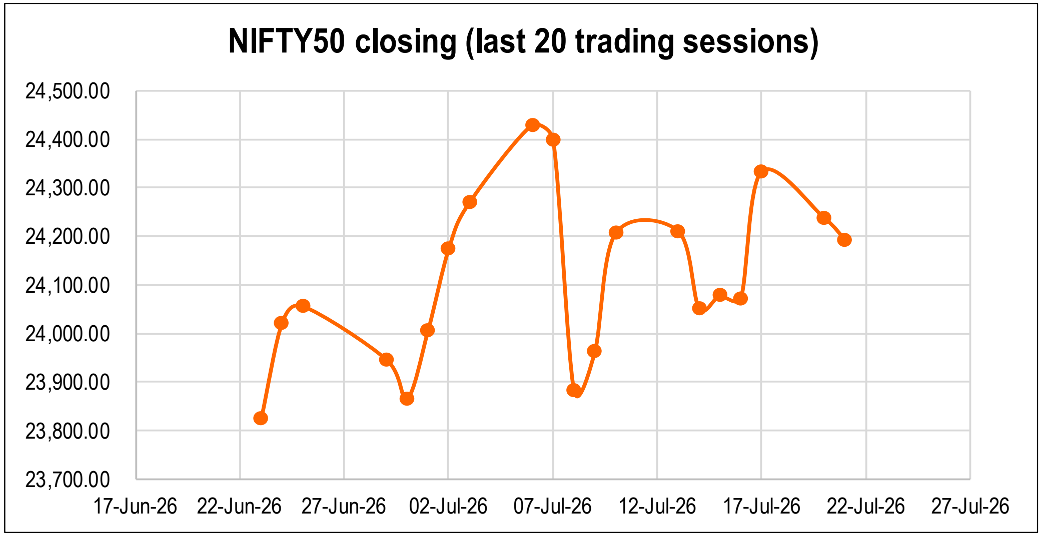
FIIs F&O Flows	21-Jul-2026	MTD
Index Futures	-1,487.46	4,130.99
Index Options	-70,338.11	-1,70,812.24
Stock Futures	-1,690.03	-64.65
Stock Options	-339.28	-1,396.12



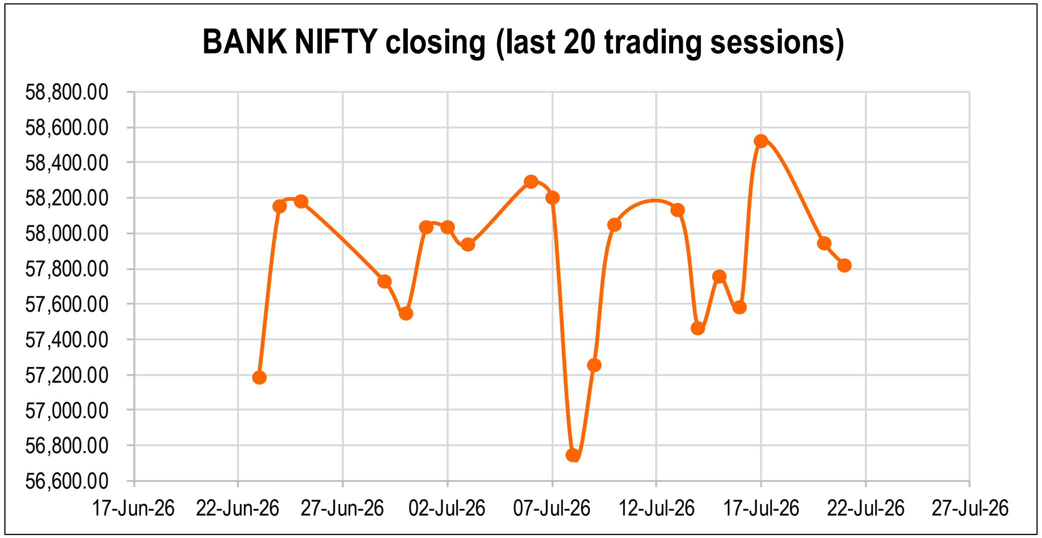


INDEX VIEW

NIFTY	
Spot	24193.15
Futures	24180.60
Highest CE OI (28th JULY)	24200
Highest PE OI (28th JULY)	24200
PCR (28th JULY)	0.91
Key Supply Zones	24600, 25150
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57817.60
Futures	57968.60
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	58000
PCR (28th JULY)	0.88
Key Supply Zones	58200, 58700
Key Demand Zones	57500, 56500



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Auto	27,320.10	1.08%	2.53%	3.11%	-3.08%
Nifty Realty	926.55	0.99%	1.25%	14.95%	5.54%
Nifty Metal	12,631.60	0.70%	0.76%	-0.30%	13.11%
Nifty Pharma	26,095.05	0.35%	0.35%	4.42%	14.84%
Nifty Healthcare	16,545.90	0.34%	0.23%	3.94%	13.02%
Nifty Infrastructure	9,450.30	0.08%	1.20%	-0.11%	-1.73%
Nifty Private Bank	27,872.10	0.04%	-0.47%	0.39%	-2.96%
Nifty Media	1,537.50	-0.04%	2.25%	1.53%	6.42%
Nifty Financial Services	26,538.95	-0.13%	-0.58%	0.80%	-3.89%
Nifty Energy	39,581.95	-0.21%	0.51%	-1.71%	12.05%
Nifty Bank	57,817.60	-0.22%	0.10%	1.11%	-2.96%
Nifty FMCG	48,935.55	-0.27%	1.34%	-0.25%	-11.79%
Nifty Consumer Durables	39,526.95	-0.39%	1.51%	8.36%	7.54%
Nifty Oil & Gas	11,309.70	-0.52%	1.17%	1.24%	-7.53%
Nifty IT	28,952.60	-0.72%	1.47%	7.18%	-23.58%
Nifty PSU Bank	8,537.60	-0.90%	1.80%	-0.62%	0.05%

Sector View

Nifty Auto Index has been sustaining above its 50-day SMA for nearly a month, indicating underlying strength and stability in the sector. A decisive breakout above the 27,550 resistance zone could trigger fresh buying interest and accelerate bullish momentum across the auto space.

Stocks in Bullish Momentum:

BAJAJFINSV, MANAPPURAM.

Stocks in Bearish Momentum:

TATAELXSI, WAAREEENER.

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	3182.70	-0.02	3119.95	2959.60	2412.24
ADANIPORTS	1846.50	0.14	1825.95	1809.14	1560.64
APOLLOHOSP	8926.50	0.24	8776.30	8476.09	7699.95
ASIANPAINT	2692.40	0.04	2683.98	2670.17	2571.59
AXISBANK	1258.20	0.18	1330.60	1307.67	1282.26
BAJAJ_AUTO	10403.50	-1.13	10082.00	10215.44	9533.70
BAJAJFINSV	1900.60	2.10	1845.10	1785.43	1920.01
BAJFINANCE	1069.20	0.49	1018.46	956.47	970.23
BEL	410.05	0.47	412.67	415.20	420.68
BHARTIARTL	1948.40	0.43	1902.29	1867.75	1950.90
CIPLA	1432.50	-0.63	1443.16	1408.62	1410.68
COALINDIA	431.25	0.43	433.57	449.11	424.44
DRREDDY	1206.00	-1.40	1296.64	1293.61	1264.86
EICHERMOT	7689.50	1.67	7417.20	7293.17	7209.94
ETERNAL	286.60	-0.12	279.49	260.83	276.37
GRASIM	3179.80	1.15	3143.18	3103.75	2864.79
HCLTECH	1239.50	1.49	1146.01	1152.49	1419.26
HDFCBANK	761.45	-2.08	803.79	779.27	883.98
HDFCLIFE	561.00	-0.65	570.44	582.70	677.27
HINDALCO	951.40	0.38	961.56	1026.42	925.95
HINDUNILVR	2142.50	0.13	2153.75	2172.22	2293.24
ICICIBANK	1463.10	0.20	1403.84	1327.68	1346.09
INDIGO	5305.00	1.45	5279.86	4824.57	4972.72
INFY	1073.50	-1.25	1057.55	1117.41	1370.65
ITC	281.00	-0.60	284.76	290.04	338.11

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	240.03	0.46	238.41	237.41	266.05
JSWSTEEL	1267.40	0.83	1235.42	1265.49	1203.50
KOTAKBANK	385.95	1.02	388.27	388.18	404.97
LT	3846.60	0.20	3982.91	3992.99	3959.41
M&M	3201.70	1.14	3130.19	3099.90	3372.47
MARUTI	13597.00	0.61	13853.55	13461.74	14697.30
MAXHEALTH	1100.40	-0.18	1111.04	1057.42	1060.19
NESTLEIND	1451.90	0.39	1433.58	1423.45	1311.03
NTPC	348.55	0.37	351.54	365.62	356.78
ONGC	249.89	0.12	242.85	259.94	259.06
POWERGRID	286.70	-0.69	285.47	289.79	286.00
RELIANCE	1303.70	-1.47	1304.04	1316.60	1413.04
SBILIFE	1827.90	0.19	1807.20	1812.29	1919.53
SBIN	1044.40	-1.47	1035.97	1004.31	1017.22
SHRIRAMFIN	1061.50	2.52	1038.43	981.49	929.61
SUNPHARMA	1961.90	0.28	1908.98	1860.80	1759.20
TATACONSUM	1081.50	-0.95	1101.00	1139.62	1142.48
TATASTEEL	187.24	0.45	188.32	199.55	190.53
TCS	2221.10	-1.33	2119.01	2195.70	2718.99
TECHM	1576.30	-0.01	1461.68	1454.61	1487.41
TITAN	4688.70	0.98	4505.41	4303.93	4091.84
TMPV	333.80	-0.79	341.48	360.59	363.22
TRENT	2894.70	-1.07	3062.91	2925.83	2808.85
ULTRACEMCO	12094.00	1.60	11590.10	11443.84	11820.07
WIPRO	174.97	-0.80	174.68	185.30	219.57

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