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DAILY TECHNICAL & DERIVATIVES REPORT

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23rd July, 2026

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,218.58	-6.06	-0.01%
S&P 500	7,498.96	-10.24	-0.14%
NASDAQ 100	28,998.10	-157.08	-0.54%
FTSE 100	10,716.97	131.06	1.24%
NIKKIE (8:00 AM)	66,466.00	350.40	0.53%
HANG SENG (8:00 AM)	25,145.50	252.84	1.02%
GOLD	4,120.51	-31.39	-0.76%
SILVER	59.88	-0.42	-0.69%
BRENT OIL	95.76	1.69	1.80%
DOLLAR INDEX	100.86	-0.09	-0.09%
USD/INR	96.64	0.08	0.09%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The Nasdaq led **Wall Street** lower on Wednesday as technology stocks delivered a mixed performance, with investors awaiting key earnings reports to assess whether the AI-driven market rally can be sustained. **Asian equities** advanced, earlier on Thursday, supported by gains in regional semiconductor stocks as investors remained optimistic about the benefits of massive investments in AI infrastructure.

- **Crude oil** prices rose more than 1.5% to their highest level in over six weeks after the U.S. launched a fresh round of strikes against Iran, while attacks by Yemen's Houthis on oil tankers in the Red Sea further heightened concerns over global energy supplies.

- **GIFT Nifty** trading at ~23,875.00 is indicating a negative bias for the Indian market on Thursday.

MARKET SNAPSHOT

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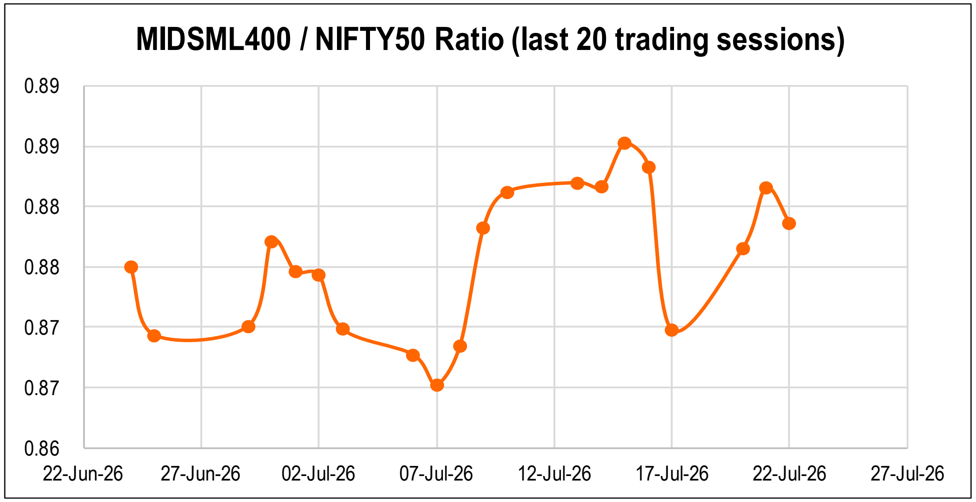
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,996.25	-191.45	-0.79%
SENSEX	76,755.05	-715.06	-0.92%
BANK NIFTY	57,126.80	-708.55	-1.23%
FIN NIFTY	26,188.85	-342.80	-1.29%
MIDCAP NIFTY	14,626.35	-187.95	-1.27%
NIFTY SMLCAP 250	17,863.75	-237.25	-1.31%
INDIA VIX	13.31	0.71	5.62%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	10	40	0
NIFTY 500	86	413	2
NIFTY F&O	43	167	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	24	48%
NIFTY 500	220	44%

Highlights

- Geopolitical uncertainty continued to weigh on investor sentiment, pushing Nifty below the crucial 24,000 level.
- Persistent selling in private banking stocks remained a major drag on the benchmark, with HDFC Bank extending its decline for the third consecutive session.
- FMCG stocks attracted buying interest as investors rotated towards defensive sectors amid heightened uncertainty. The ongoing shift in sectoral leadership highlights a cautious market environment.



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HCL Technologies

HCLTech has been selected by TIM Brasil, the 5G leader in the country, to enable South America's first cross-platform eSIM transfer capability. This digital innovation will enhance the mobile telephony experience for millions of users across Brazil.

Rubicon Research

The company announced the acquisition of a manufacturing facility in East Brunswick, New Jersey, from InvaTech Pharma Solutions for an enterprise value of $2.9 million. This acquisition gives the company a manufacturing footprint in the United States.

Sona BLW Precision Forgings

The company has signed definitive agreements with DENSO Corporation, Japan, to establish two joint ventures to develop, design, manufacture, and market advanced electric and hybrid powertrain systems across multiple vehicle segments.

Dr Reddy's Laboratories

The company does not see it as practical to shift generic drug manufacturing to the US in response to US President Donald Trump's proposed pharmaceutical tariffs, with CEO Erez Israeli saying higher medicine prices not factory relocations would be the more likely outcome if the levies are implemented.

*Source: moneycontrol.com

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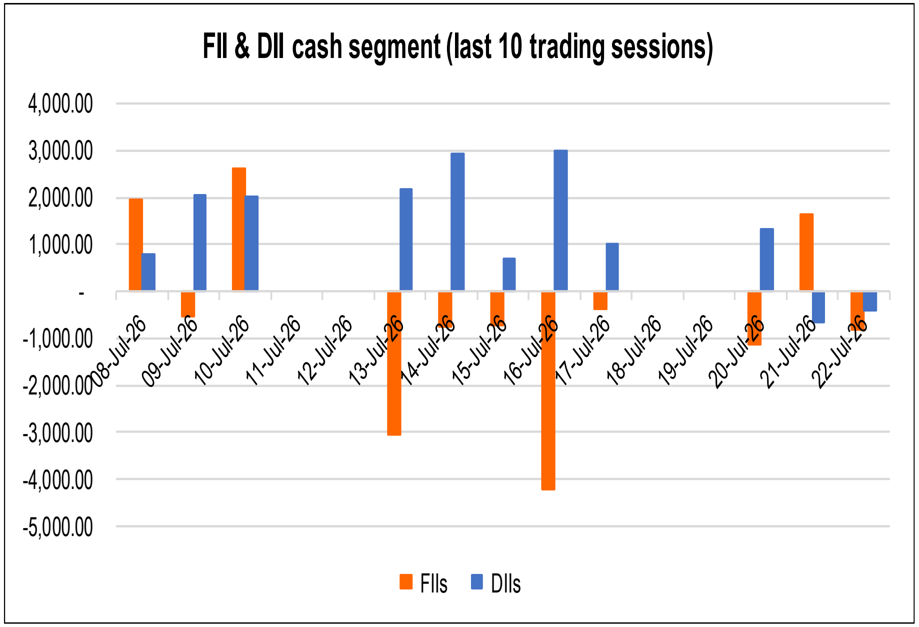
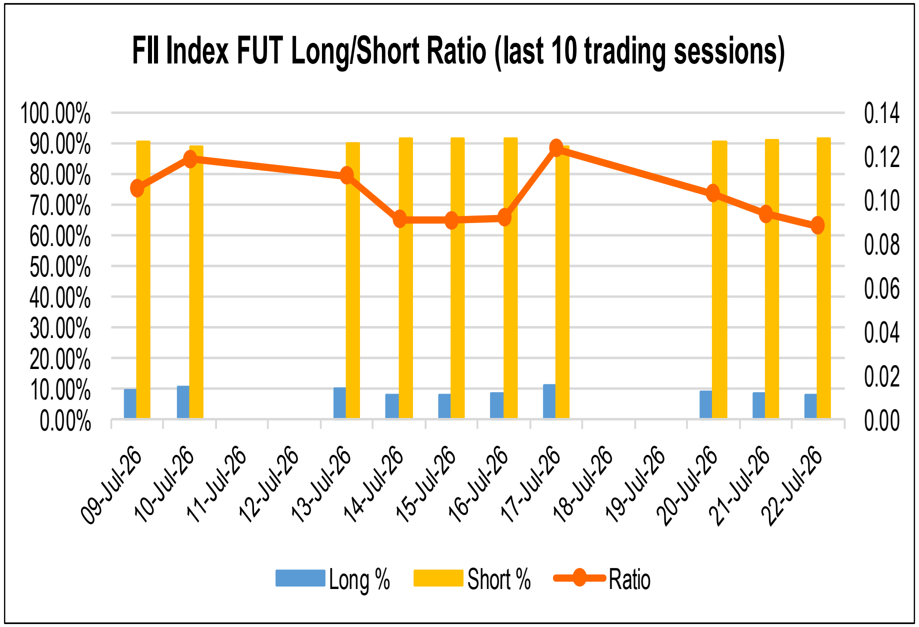
*INR in Crores

Cash Segment	22-Jul-2026	MTD	YTD
FII Net Flows	-819.20	-4,836.95	-3,50,580.78
DII Net Flows	-418.26	21,310.90	4,91,448.06

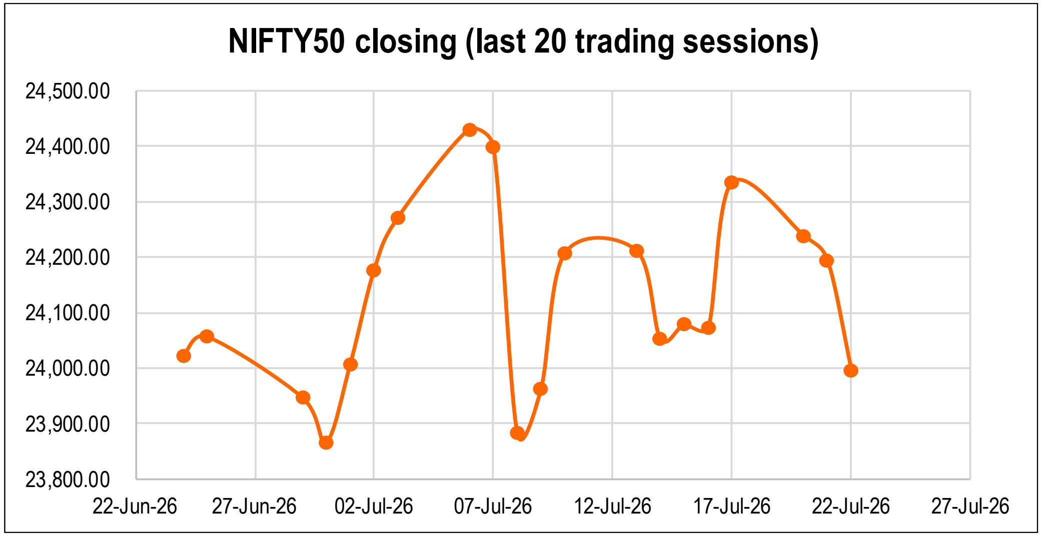
*INR in Crores

FIIs F&O Flows	22-Jul-2026	MTD
Index Futures	-3,606.85	524.14
Index Options	-6,918.88	-1,77,731.12
Stock Futures	-980.43	-1,045.08
Stock Options	-437.96	-1,834.08

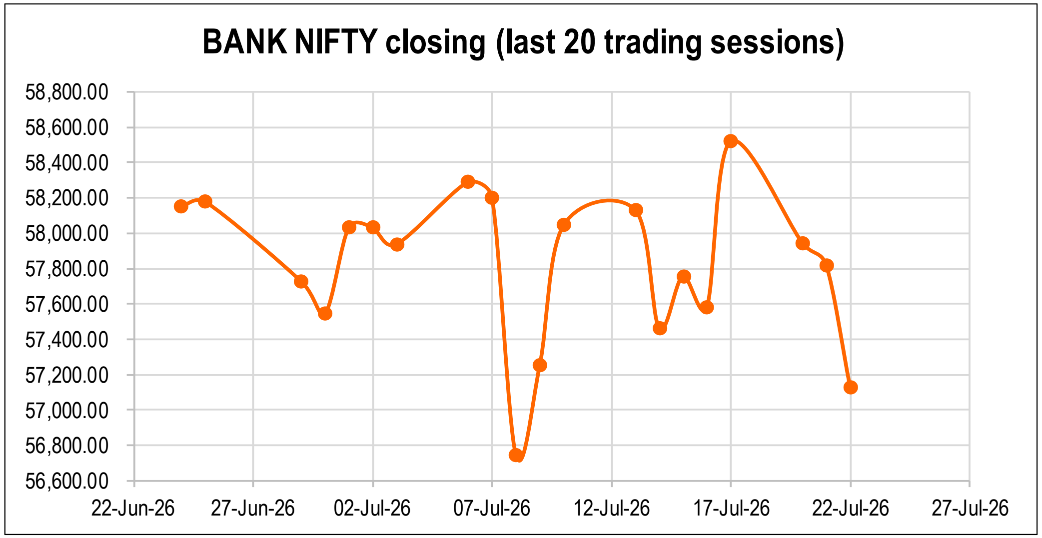




NIFTY	
Spot	23996.25
Futures	23988.40
Highest CE OI (28th JULY)	24200
Highest PE OI (28th JULY)	24000
PCR (28th JULY)	0.73
Key Supply Zones	24350, 24600
Key Demand Zones	24800, 23650



BANK NIFTY	
Spot	57126.80
Futures	57198.60
Highest CE OI (28th JULY)	59000
Highest PE OI (28th JULY)	59000
PCR (28th JULY)	0.76
Key Supply Zones	57500, 58200
Key Demand Zones	56500, 55500



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty FMCG	49,233.80	0.65%	1.71%	0.30%	-11.25%
Nifty Auto	27,329.65	0.18%	2.10%	3.58%	-3.05%
Nifty Energy	39,435.65	-0.38%	0.23%	-1.18%	11.63%
Nifty Metal	12,562.85	-0.48%	0.54%	-0.44%	12.49%
Nifty Oil & Gas	11,243.15	-0.61%	0.49%	0.01%	-8.08%
Nifty Infrastructure	9,369.95	-0.85%	0.41%	-0.98%	-2.56%
Nifty Consumer Durables	39,188.70	-0.86%	-0.82%	7.13%	6.62%
Nifty Healthcare	16,350.95	-1.19%	-0.87%	2.49%	11.69%
Nifty Bank	57,126.80	-1.23%	-0.79%	-1.76%	-4.12%
Nifty Financial Services	26,188.85	-1.29%	-1.39%	-2.05%	-5.16%
Nifty Pharma	25,752.25	-1.31%	-0.98%	2.93%	13.33%
Nifty Private Bank	27,493.45	-1.39%	-1.51%	-2.77%	-4.27%
Nifty IT	28,549.85	-1.50%	-0.60%	3.57%	-24.64%
Nifty PSU Bank	8,381.80	-1.84%	0.41%	-2.86%	-1.77%
Nifty Realty	903.00	-2.63%	-0.35%	9.65%	2.85%
Nifty Media	1,496.20	-2.68%	-1.66%	-1.52%	3.56%

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:

BAJAJAUTO, NESTLEIND.

Stocks in Bearish Momentum:

ANGELONE, COCHINSHIP.

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	3147.70	-1.10	3129.19	2972.55	2415.65
ADANIPORTS	1819.40	-1.47	1827.72	1810.18	1562.78
APOLLOHOSP	8938.00	0.13	8798.83	8493.21	7707.09
ASIANPAINT	2692.80	0.01	2685.56	2672.71	2573.34
AXISBANK	1238.40	-1.57	1324.35	1306.99	1282.68
BAJAJ_AUTO	10998.50	5.72	10130.67	10223.50	9545.18
BAJAJFINSV	1876.40	-1.27	1850.67	1787.07	1919.38
BAJFINANCE	1060.30	-0.83	1023.35	958.96	970.60
BEL	406.75	-0.80	412.01	414.70	420.73
BHARTIARTL	1949.00	0.03	1904.66	1871.53	1951.06
CIPLA	1415.10	-1.21	1442.26	1410.83	1410.25
COALINDIA	428.40	-0.66	432.77	448.39	424.64
DRREDDY	1182.80	-1.92	1290.72	1291.67	1264.50
EICHERMOT	7632.00	-0.75	7419.90	7301.76	7212.87
ETERNAL	284.40	-0.77	280.76	261.60	276.18
GRASIM	3166.30	-0.42	3144.28	3107.39	2866.89
HCLTECH	1237.30	-0.18	1152.40	1153.34	1418.47
HDFCBANK	753.15	-1.09	802.72	779.06	883.02
HDFCLIFE	553.10	-1.41	568.23	581.31	676.21
HINDALCO	950.00	-0.15	959.72	1024.95	926.98
HINDUNILVR	2154.60	0.56	2153.47	2169.17	2291.65
ICICIBANK	1440.70	-1.53	1408.96	1331.17	1346.50
INDIGO	5117.00	-3.54	5287.64	4840.92	4970.50
INFY	1052.10	-1.99	1058.69	1114.91	1368.67
ITC	280.80	-0.07	284.30	289.53	337.49

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	234.80	-2.18	238.26	237.30	265.75
JSWSTEEL	1266.90	-0.04	1236.66	1265.58	1204.19
KOTAKBANK	381.15	-1.24	387.25	388.19	404.88
LT	3817.40	-0.76	3964.81	3990.53	3959.84
M&M	3175.30	-0.82	3137.09	3098.49	3371.36
MARUTI	13545.00	-0.38	13858.25	13462.98	14683.60
MAXHEALTH	1081.00	-1.76	1111.19	1058.28	1059.98
NESTLEIND	1493.60	2.87	1438.65	1423.69	1312.69
NTPC	350.50	0.56	350.83	364.78	356.84
ONGC	251.90	0.80	243.22	259.36	259.13
POWERGRID	289.30	0.91	285.34	289.35	286.04
RELIANCE	1288.60	-1.16	1302.99	1314.60	1412.60
SBILIFE	1806.70	-1.16	1808.23	1810.74	1919.57
SBIN	1025.00	-1.86	1036.01	1005.34	1018.06
SHRIRAMFIN	1058.80	-0.25	1041.71	983.14	931.88
SUNPHARMA	1943.00	-0.96	1912.73	1862.20	1760.98
TATACONSUM	1094.90	1.24	1100.55	1136.10	1142.36
TATASTEEL	186.53	-0.38	187.97	199.04	190.63
TCS	2208.30	-0.58	2126.44	2192.01	2715.54
TECHM	1560.60	-1.00	1468.93	1456.67	1488.17
TITAN	4711.60	0.49	4525.72	4314.05	4098.76
TMPV	327.70	-1.83	340.14	360.23	362.82
TRENT	2887.30	-0.26	3050.13	2927.83	2807.69
ULTRACEMCO	11893.00	-1.66	11619.40	11444.38	11819.18
WIPRO	174.44	-0.30	174.68	184.85	219.26

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