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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,947.25	235.60	0.46%
S&P 500	7,411.98	3.68	0.05%
NASDAQ 100	28,128.34	-326.47	-1.15%
FTSE 100	10,736.23	97.06	0.91%
NIKKIE (8:00 AM)	64,613.50	2.35	0.00%
HANG SENG (8:00 AM)	25,119.00	155.77	0.62%
GOLD	4,103.05	32.25	0.79%
SILVER	59.80	0.89	1.52%
BRENT OIL	88.59	-3.09	-3.37%
DOLLAR INDEX	101.00	-0.30	-0.30%
USD/INR	96.25	-0.31	-0.32%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **Nasdaq** declined on Friday as investors continued to sell semiconductor stocks amid concerns over the massive spending required to build out artificial intelligence infrastructure, ahead of another batch of earnings from mega-cap technology companies. However, falling crude oil prices provided some support to Wall Street despite ongoing tensions in the Middle East.

- **Asian markets** rallied earlier on Monday as a pause in Gulf hostilities led to a sharp decline in oil prices, easing concerns over inflation and supporting bond markets ahead of a busy week of central-bank meetings and corporate earnings.

- **GIFT Nifty** trading at ~23,966.00 is indicating a positive start for the Indian market on Monday.

MARKET SNAPSHOT

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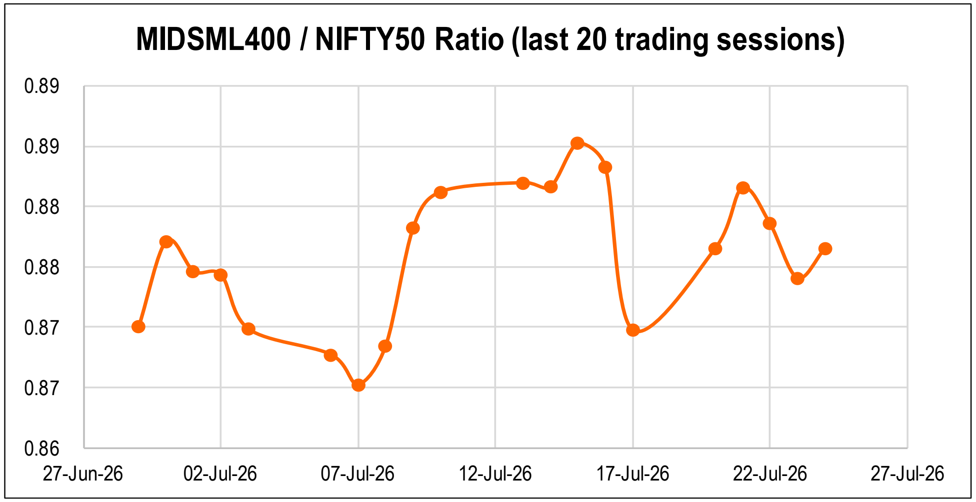
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,767.45	-102.15	-0.43%
SENSEX	76,059.77	-331.62	-0.43%
BANK NIFTY	56,693.50	101.50	0.18%
FIN NIFTY	25,909.90	-82.15	-0.32%
MIDCAP NIFTY	14,436.05	7.70	0.05%
NIFTY SMLCAP 250	17,601.20	-50.05	-0.28%
INDIA VIX	14.03	0.56	4.12%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	14	36	0
NIFTY 500	245	253	0
NIFTY F&O	104	106	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	16	32%
NIFTY 500	155	31%

Highlights

- Nifty bounced from the crucial 23,600 support zone after three consecutive sessions of decline and managed to close in the green.
- IT stocks led the benchmark's recovery, with HCL Technologies and Wipro emerging as the top two Nifty 50 gainers.
- The broad-based nature of the recovery was evident as most sectoral indices closed positively, with Auto and Energy being the notable exceptions.



Waaree Renewable Technologies

The company has received two Letters of Award (LoAs) for the execution of engineering, procurement, and construction (EPC) works for two ground-mounted solar PV plants with a combined capacity of 800 MWac / 1,082 MWp.

NBCC (India)

The company has received two work orders worth Rs 20.42 crore and Rs 88.43 crore from the National Horticulture Board and the Directorate of Technical Education & Training (Odisha), respectively.

Authum Investment & Infrastructure

The Income Tax Department has concluded its search operations at the company's corporate office and commercial premises. The company's officers and executives extended full cooperation to the officials and provided all necessary documents, information, and clarifications sought during the search.

Sarda Energy and Minerals

The Board of Directors of Sarda Metals & Alloys, the wholly owned subsidiary of the company, has approved a capital expenditure of Rs 300 crore as part of its green initiative. The investment will be used for the installation of a waste heat recovery power plant and the expansion of the mineral wool manufacturing facility at its existing plant premises in Vizianagaram.

*Source: moneycontrol.com

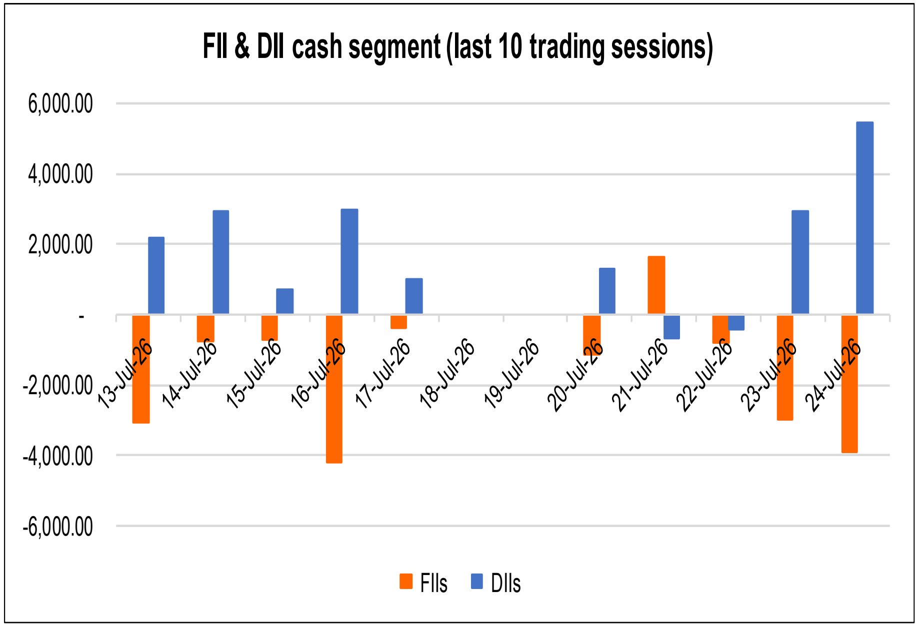
INSTITUTIONAL ACTIVITY

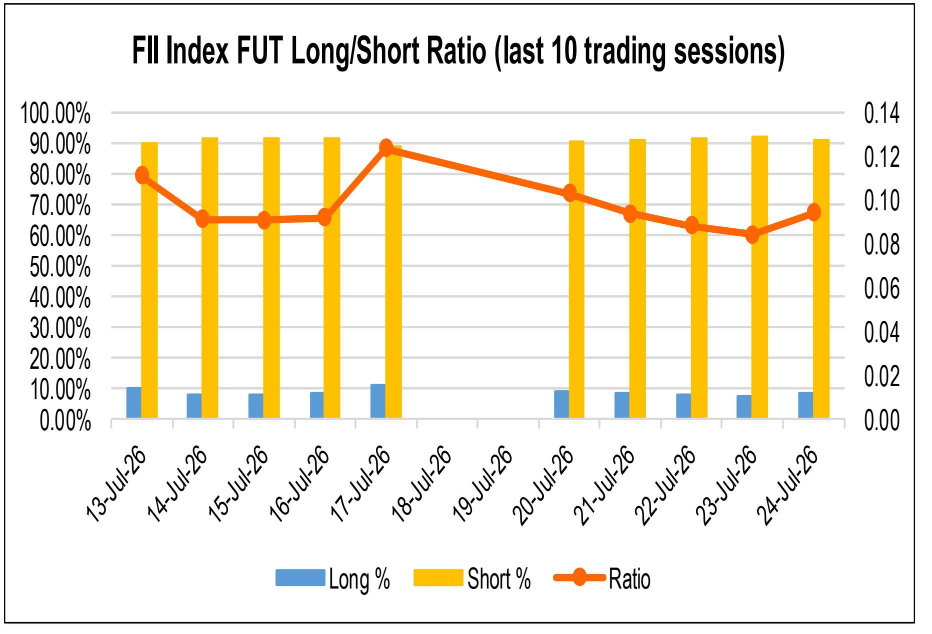
*INR in Crores

Cash Segment	24-Jul-2026	MTD	YTD
FII Net Flows	-3,892.77	-11,728.95	-3,57,472.78
DII Net Flows	5,453.55	29,711.59	4,99,848.75

*INR in Crores

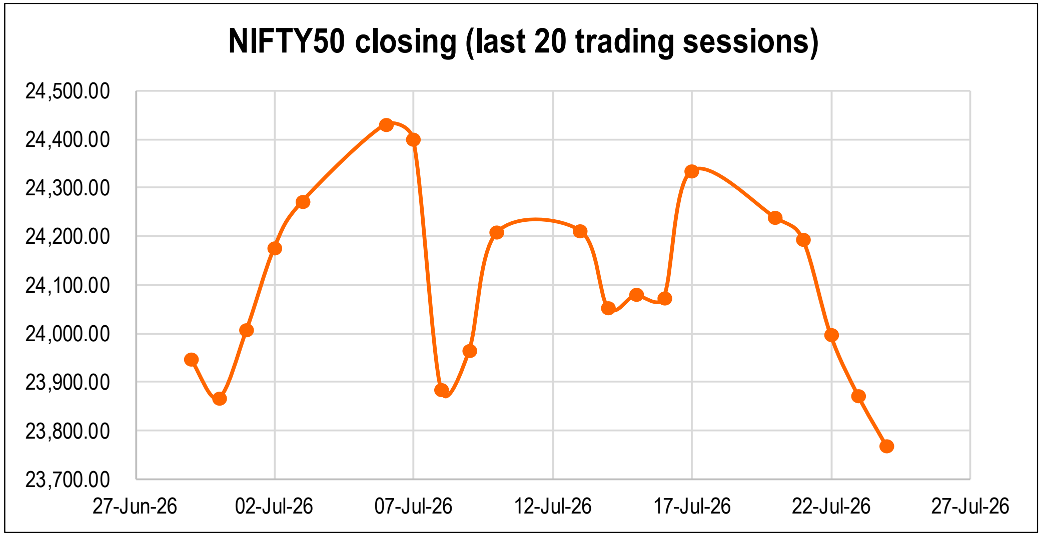
FIIs F&O Flows	24-Jul-2026	MTD
Index Futures	-1,201.59	-2,517.47
Index Options	7,104.61	-1,80,850.45
Stock Futures	2,115.55	3,251.96
Stock Options	-1,433.01	-1,920.88



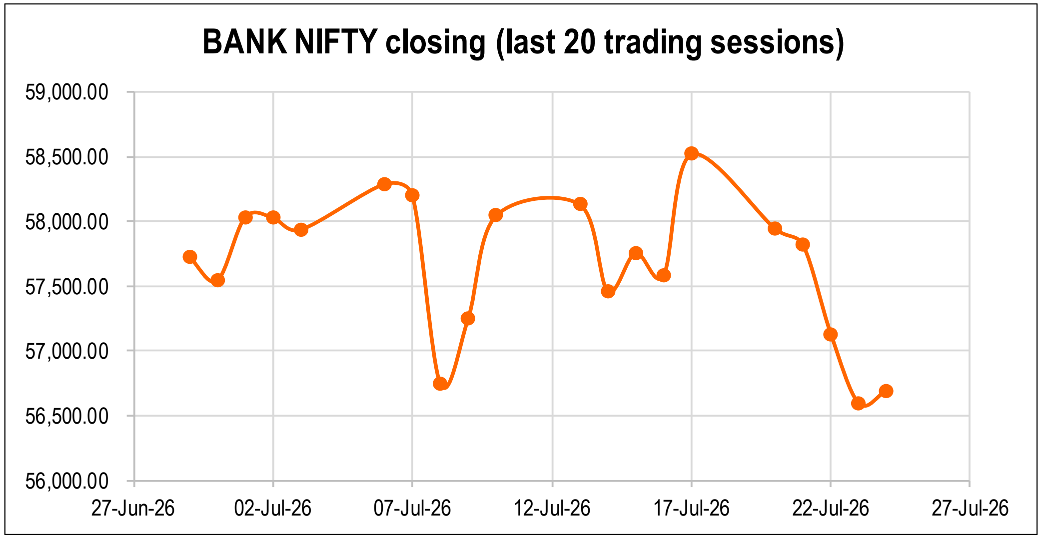


INDEX VIEW

NIFTY	
Spot	23767.45
Futures	23806.50
Highest CE OI (28th JULY)	25000
Highest PE OI (28th JULY)	23000
PCR (28th JULY)	0.83
Key Supply Zones	24000, 24350
Key Demand Zones	23650, 23050



BANK NIFTY	
Spot	56693.50
Futures	56844.60
Highest CE OI (28th JULY)	58000
Highest PE OI (28th JULY)	56000
PCR (28th JULY)	0.79
Key Supply Zones	57500, 58200
Key Demand Zones	56500, 55500



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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Media	1,527.45	1.86%	-0.69%	1.17%	5.73%
Nifty IT	28,767.95	0.82%	-1.35%	5.26%	-24.06%
Nifty PSU Bank	8,345.65	0.58%	-3.13%	-3.36%	-2.20%
Nifty Bank	56,693.50	0.18%	-2.16%	-2.55%	-4.85%
Nifty FMCG	49,053.30	0.04%	-0.03%	-0.74%	-11.58%
Nifty Private Bank	27,277.55	-0.01%	-2.10%	-3.69%	-5.03%
Nifty Consumer Durables	38,948.40	-0.14%	-1.85%	7.18%	5.96%
Nifty Financial Services	25,909.90	-0.32%	-2.50%	-3.21%	-6.17%
Nifty Healthcare	16,236.25	-0.36%	-1.54%	1.71%	10.90%
Nifty Pharma	25,548.15	-0.41%	-1.75%	2.32%	12.43%
Nifty Infrastructure	9,240.85	-0.42%	-2.14%	-2.32%	-3.90%
Nifty Oil & Gas	11,077.00	-0.46%	-2.57%	-0.59%	-9.44%
Nifty Realty	881.80	-0.55%	-3.89%	6.72%	0.44%
Nifty Metal	12,401.55	-0.55%	-1.13%	-0.35%	11.05%
Nifty Energy	38,821.80	-0.57%	-2.12%	-2.06%	9.90%
Nifty Auto	27,217.95	-1.10%	0.70%	0.89%	-3.45%

Sector View

Nifty MidCap Select Index filled the gap near 14,260 and rebounded sharply from the same on Friday, closing near the day's high of 14,451. The strong recovery indicates sustained buying interest at lower levels, with the technical setup favouring an extended upside move. 14,600 is likely to act as the immediate resistance.

Stocks in Bullish Momentum:

ASTRAL, UNITDSPR.

Stocks in Bearish Momentum:

ONGC, MOTILALOFS.

Stocks in F&O ban list:

Nil.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3026.40	0.54	3125.62	2995.22	2421.50
ADANIPORTS	1768.30	-0.57	1824.60	1812.59	1566.58
APOLLOHOSP	8805.50	-0.64	8823.93	8526.02	7721.16
ASIANPAINT	2637.90	-1.16	2685.26	2676.38	2576.41
AXISBANK	1227.30	0.35	1308.78	1305.68	1283.62
BAJAJ_AUTO	11130.00	-1.36	10271.70	10258.59	9570.27
BAJAJFINSV	1876.70	-0.67	1861.72	1792.92	1918.05
BAJFINANCE	1012.80	-2.60	1027.41	964.00	970.92
BEL	405.00	-0.09	411.49	414.01	420.76
BHARTIARTL	1898.20	-1.70	1909.72	1877.20	1951.30
CIPLA	1410.60	1.26	1438.54	1414.50	1409.32
COALINDIA	427.40	0.08	431.63	446.97	425.02
DRREDDY	1151.70	-1.25	1272.67	1287.32	1263.80
EICHERMOT	7628.00	-1.21	7428.87	7326.80	7219.66
ETERNAL	280.00	-2.47	283.54	263.38	275.77
GRASIM	3089.40	-0.76	3141.68	3114.47	2870.38
HCLTECH	1271.00	2.11	1167.45	1157.87	1417.19
HDFCBANK	742.80	-0.60	797.74	778.86	880.96
HDFCLIFE	555.05	0.74	564.67	579.34	674.18
HINDALCO	942.80	-1.34	958.15	1020.63	928.89
HINDUNILVR	2145.00	-0.78	2152.21	2164.72	2288.51
ICICIBANK	1432.90	-0.12	1414.28	1339.00	1347.35
INDIGO	4985.00	-0.77	5255.21	4871.94	4964.04
INFY	1040.90	-0.62	1058.22	1111.41	1364.69
ITC	283.45	0.76	283.52	288.73	336.27

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	234.71	0.66	237.74	237.41	265.15
JSWSTEEL	1240.80	-0.48	1237.93	1264.78	1205.30
KOTAKBANK	384.75	0.37	384.91	388.48	404.74
LT	3785.60	-0.18	3923.80	3986.65	3961.00
M&M	3161.40	-2.11	3144.31	3100.55	3369.09
MARUTI	13442.00	0.29	13850.85	13474.38	14657.76
MAXHEALTH	1080.40	-0.35	1109.16	1060.70	1059.67
NESTLEIND	1443.50	-0.30	1443.96	1422.77	1315.62
NTPC	347.20	-0.40	350.17	363.03	356.91
ONGC	248.76	-1.43	244.62	257.55	259.24
POWERGRID	288.20	-0.55	285.50	288.76	286.12
RELIANCE	1278.00	0.46	1298.92	1311.15	1411.67
SBILIFE	1858.60	0.28	1818.20	1811.55	1920.24
SBIN	1015.00	0.24	1033.39	1006.99	1019.48
SHRIRAMFIN	1005.10	-2.02	1040.71	986.74	935.89
SUNPHARMA	1941.10	-0.66	1920.63	1866.69	1764.54
TATACONSUM	1088.00	-1.78	1098.87	1130.25	1142.07
TATASTEEL	182.67	-0.85	187.37	197.74	190.78
TCS	2254.30	0.51	2141.12	2190.49	2709.10
TECHM	1559.50	0.24	1479.76	1463.62	1489.69
TITAN	4677.00	-0.43	4563.68	4338.62	4111.79
TMPV	323.80	-0.15	337.40	359.72	361.98
TRENT	2890.50	0.55	3015.24	2934.67	2805.16
ULTRACEMCO	11846.00	-0.52	11661.15	11457.68	11816.64
WIPRO	177.12	1.32	174.80	184.35	218.63

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