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DAILY TECHNICAL & DERIVATIVES REPORT

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29th July, 2026

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,747.32	537.24	1.03%
S&P 500	7,428.78	15.60	0.21%
NASDAQ 100	27,763.13	-276.08	-0.98%
FTSE 100	10,871.02	89.27	0.83%
NIKKIE (8:00 AM)	61,762.00	-602.92	-0.97%
HANG SENG (8:00 AM)	25,708.50	397.65	1.57%
GOLD	4,031.50	-7.20	-0.18%
SILVER	58.00	0.47	0.81%
BRENT OIL	84.79	2.71	3.30%
DOLLAR INDEX	101.21	-0.06	-0.06%
USD/INR	95.81	-0.04	-0.04%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **S&P 500** ended higher on Tuesday as gains in Boeing and Coca-Cola offset weakness in semiconductor stocks ahead of quarterly earnings from Apple and other major technology companies later this week. Weakness continued for the fourth consecutive session in Asian indices including **NIKKEI 225** and **KOSPI**.

- **Crude oil** prices rose by more than $2 per barrel in early Wednesday trade after a larger-than-expected drawdown in U.S. crude inventories. The move recouped part of the previous session's losses, which had followed a pause in hostilities between the U.S. and Iran.

- **GIFT Nifty** trading at ~24,241.00 is indicating a positive bias for the Indian market on Wednesday.

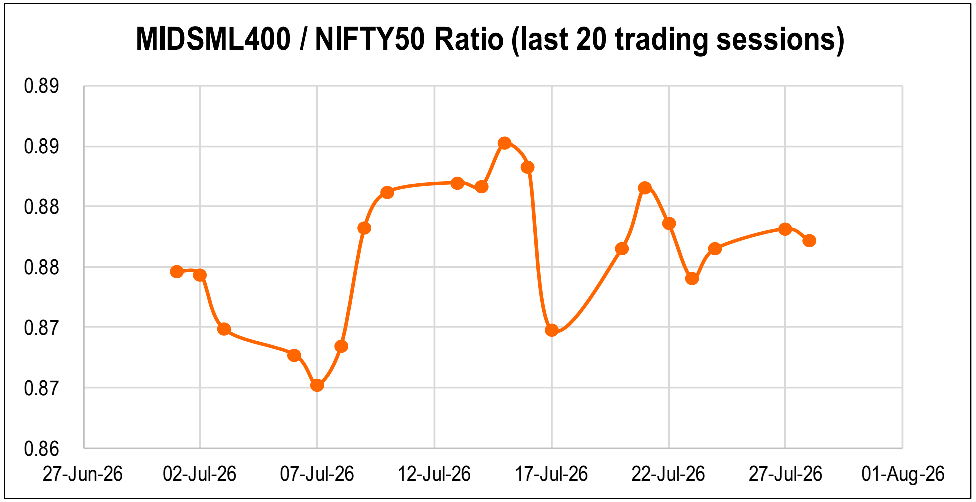
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,983.95	-12.00	-0.05%
SENSEX	76,765.92	-69.86	-0.09%
BANK NIFTY	56,716.65	-370.55	-0.65%
FIN NIFTY	26,022.15	-104.00	-0.40%
MIDCAP NIFTY	14,560.45	-12.45	-0.09%
NIFTY SMLCAP 250	17,750.50	-74.00	-0.42%
INDIA VIX	12.46	-0.20	-1.60%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	30	20	0
NIFTY 500	189	311	0
NIFTY F&O	104	104	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	24	48%
NIFTY 500	276	55%

Highlights

- Nifty traded in a narrow 23,950–24,050 range on the monthly expiry, reflecting a lack of clear directional conviction.
- IT stocks extended their rally for the third consecutive session, while Realty, Consumer Durables and Auto sectors provided additional support to the market.
- Hindustan Unilever slipped nearly 7% after its Q1 earnings, exerting pressure on the FMCG segment and the benchmark.



Graphite India

Following its preliminary affirmative determinations in the countervailing duty (CVD) investigations, the US Department of Commerce has preliminarily imposed a 3.68 percent countervailing duty on exports of large-diameter graphite electrodes from the company.

Rail Vikas Nigam

The company has received a Letter of Acceptance (LoA) from East Central Railway for the construction of doubling works for 25T Indian Railway Standard Loading, from Kundawa Chainpur to Raxaul, in connection with the doubling of the Sitamarhi-Raxaul section in the Samastipur Division of East Central Railway. The EPC project is valued at Rs 358.97 crore.

Life Insurance Corporation of India

The board has appointed Shatmanyu Shrivastava, Executive Director (Finance & Accounts), as the Chief Financial Officer (CFO) of the corporation, effective July 28.

NTPC

The President of India has extended the re-employment of Gurdeep Singh as Chairman & Managing Director of NTPC on a contract basis for a further period of six months beyond the completion of his current tenure on July 31, 2026. The extension will take effect from August 1, 2026.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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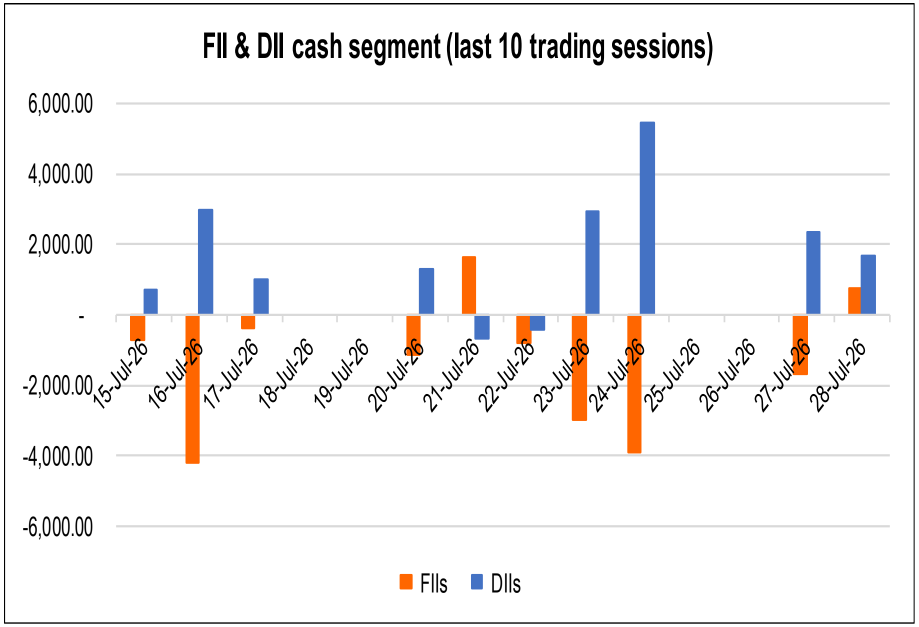
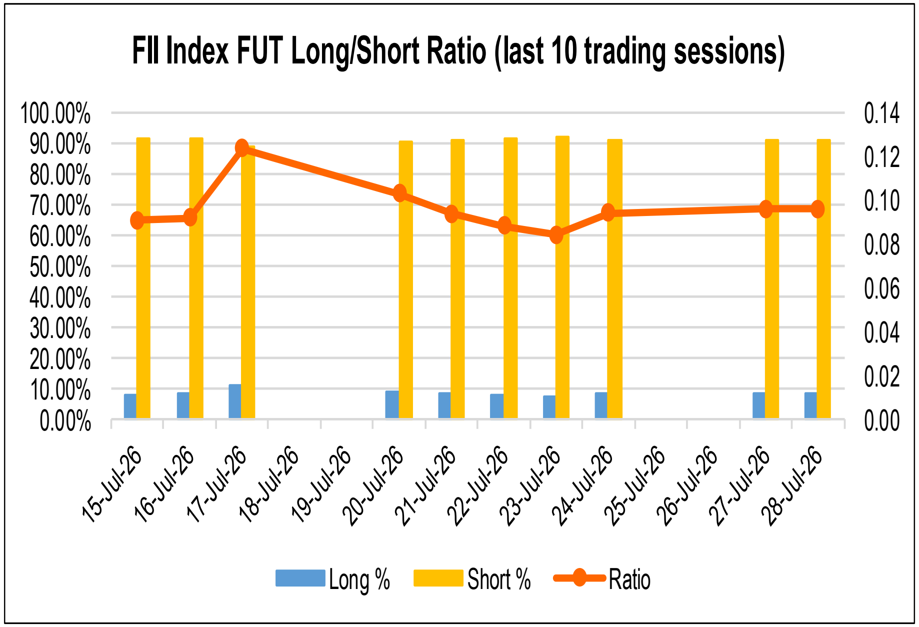
*INR in Crores

Cash Segment	28-Jul-2026	MTD	YTD
FII Net Flows	755.33	-12,661.85	-3,58,405.68
DII Net Flows	1,664.16	33,704.89	5,03,842.05

*INR in Crores

FIIs F&O Flows	28-Jul-2026	MTD
Index Futures	-2,601.31	-4,493.00
Index Options	-30,784.43	-2,15,383.81
Stock Futures	2,774.03	11,342.41
Stock Options	-414.24	-3,136.78





INDEX VIEW

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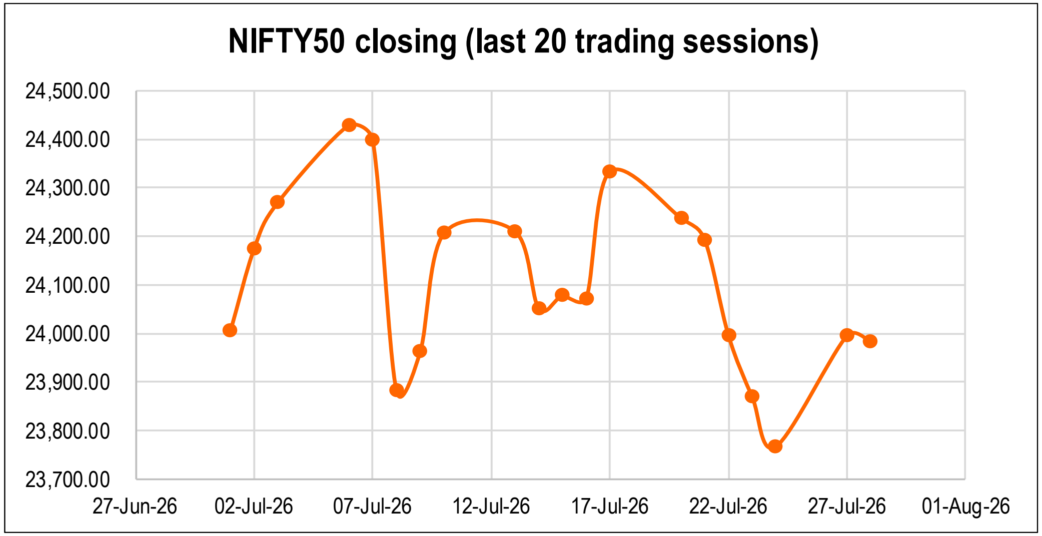
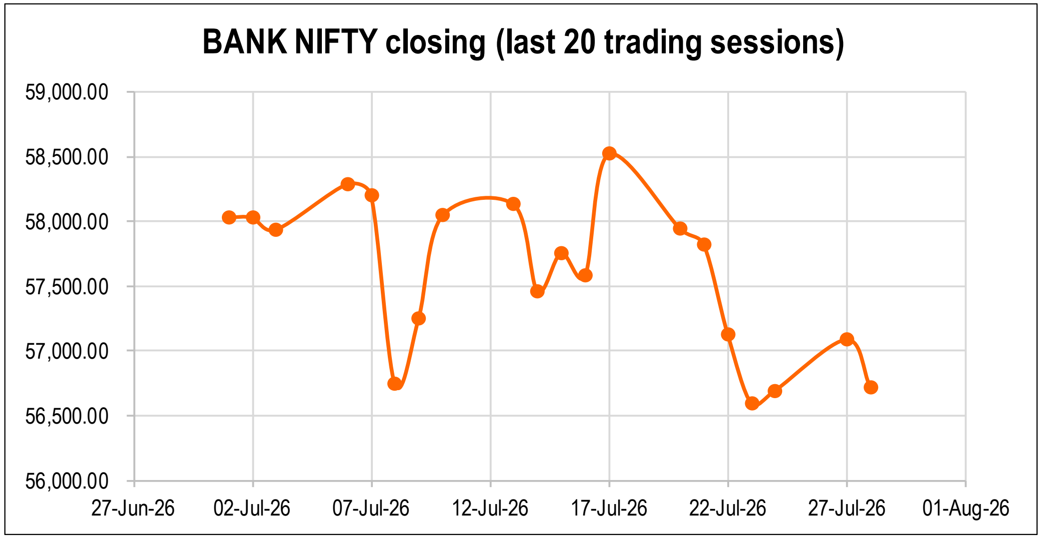
NIFTY	
Spot	23983.95
Futures	24098.80
Highest CE OI (25th AUG)	24000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.10
Key Supply Zones	24000, 24350
Key Demand Zones	23650, 23050



BANK NIFTY	
Spot	56716.65
Futures	57009.00
Highest CE OI (25th AUG)	56800
Highest PE OI (25th AUG)	56700
PCR (25th AUG)	0.87
Key Supply Zones	57500, 58200
Key Demand Zones	56500, 55500



STOCKS & SECTOR UPDATES

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty IT	30,408.55	3.28%	6.51%	15.63%	-19.73%
Nifty Realty	924.95	2.56%	2.43%	11.50%	5.35%
Nifty Consumer Durables	39,586.20	1.17%	1.01%	8.63%	7.70%
Nifty Auto	27,882.50	0.83%	2.02%	5.30%	-1.09%
Nifty Pharma	26,007.65	0.24%	0.99%	2.69%	14.45%
Nifty Healthcare	16,501.75	0.18%	0.92%	2.24%	12.72%
Nifty Oil & Gas	11,081.20	0.02%	-1.44%	0.46%	-9.40%
Nifty Infrastructure	9,264.35	-0.40%	-1.13%	-1.36%	-3.66%
Nifty Financial Services	26,022.15	-0.40%	-0.64%	-2.00%	-5.76%
Nifty Metal	12,420.10	-0.45%	-1.14%	-0.79%	11.21%
Nifty Media	1,555.60	-0.53%	3.97%	5.22%	7.68%
Nifty Private Bank	27,231.25	-0.59%	-0.95%	-2.50%	-5.19%
Nifty Bank	56,716.65	-0.65%	-0.72%	-1.44%	-4.81%
Nifty PSU Bank	8,291.20	-0.87%	-1.08%	-2.37%	-2.84%
Nifty FMCG	48,951.95	-1.24%	-0.57%	0.32%	-11.76%
Nifty Energy	38,173.70	-1.69%	-3.20%	-3.94%	8.06%

Sector View

Nifty Energy Index broke below the 38,550 support zone, forming a Bearish Marubozu candlestick on the daily chart, signalling strong selling pressure and a deterioration in short-term momentum. The technical structure suggests scope for a further correction in the coming sessions. The 200-day SMA, currently placed near 37,100, is expected to act as the next key support level.

Stocks to watch

BRITANNIA, MARICO, MANKIND, NESTLEIND.

Stocks in F&O ban list

Nil.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3002.30	-1.13	3127.64	3007.42	2426.57
ADANIPORTS	1774.70	0.24	1822.54	1812.13	1570.10
APOLLOHOSP	8903.00	0.67	8844.40	8556.92	7735.44
ASIANPAINT	2736.20	0.96	2692.95	2680.75	2580.17
AXISBANK	1223.50	-0.33	1296.20	1304.71	1284.17
BAJAJ_AUTO	11374.00	1.70	10432.27	10293.17	9596.53
BAJAJFINSV	1927.90	0.78	1876.79	1800.37	1917.22
BAJFINANCE	1048.40	0.01	1032.91	969.48	971.51
BEL	389.00	-4.46	410.13	412.88	420.65
BHARTIARTL	1901.80	-0.18	1915.42	1877.56	1951.51
CIPLA	1444.60	2.50	1435.26	1414.21	1408.43
COALINDIA	410.15	-4.06	429.32	445.40	425.35
DRREDDY	1135.60	-1.32	1250.35	1280.24	1262.77
EICHERMOT	7836.00	0.86	7484.17	7357.94	7227.88
ETERNAL	308.35	4.23	287.55	265.73	275.50
GRASIM	3116.20	0.12	3144.10	3121.59	2873.62
HCLTECH	1318.60	1.75	1189.47	1165.03	1416.35
HDFCBANK	735.40	-0.56	791.65	777.62	878.68
HDFCLIFE	558.75	1.07	562.29	577.14	672.12
HINDALCO	936.40	-0.94	956.21	1014.85	930.57
HINDUNILVR	2022.70	-6.99	2148.60	2158.25	2284.49
ICICIBANK	1430.80	-1.03	1419.96	1346.72	1348.05
INDIGO	5270.50	0.77	5246.05	4910.04	4960.22
INFY	1105.70	2.46	1065.61	1110.83	1361.15
ITC	284.65	-0.42	283.16	287.80	335.07

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	237.08	0.39	237.75	237.54	264.50
JSWSTEEL	1246.90	0.18	1239.56	1263.10	1206.22
KOTAKBANK	385.30	0.17	384.02	388.47	404.43
LT	3832.00	0.68	3890.27	3982.42	3962.17
M&M	3271.20	1.01	3161.71	3104.81	3367.01
MARUTI	13802.00	0.52	13851.10	13499.10	14636.56
MAXHEALTH	1104.80	-0.88	1106.17	1063.09	1059.86
NESTLEIND	1491.80	3.16	1451.23	1423.72	1318.62
NTPC	343.75	-2.01	349.26	361.09	356.97
ONGC	238.91	0.15	245.05	255.10	259.19
POWERGRID	285.30	-1.23	285.58	288.09	286.14
RELIANCE	1267.70	-0.96	1296.56	1308.14	1410.74
SBILIFE	1889.10	1.19	1829.94	1812.05	1921.09
SBIN	1013.20	-0.73	1031.93	1008.81	1020.99
SHRIRAMFIN	1040.90	0.26	1040.93	990.86	939.82
SUNPHARMA	1976.70	0.15	1931.28	1870.87	1767.95
TATACONSUM	1082.10	-2.28	1098.92	1124.79	1141.61
TATASTEEL	182.63	-0.88	186.83	196.32	190.91
TCS	2398.00	4.46	2169.33	2194.16	2703.49
TECHM	1635.20	3.82	1498.35	1473.54	1491.66
TITAN	4849.70	2.31	4609.11	4364.33	4125.43
TMPV	324.40	-0.99	335.14	358.85	360.91
TRENT	2930.70	-0.26	2981.64	2942.27	2802.35
ULTRACEMCO	11956.00	0.63	11723.55	11470.84	11815.25
WIPRO	181.12	1.45	175.49	183.97	218.02

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