DAILY TECHNICAL & DERIVATIVES REPORT

- Macro Pulse
- Market Snapshot
- India Key News
- Institutional Activity
- Index View
- Stocks & Sector Updates
- Key Moving Averages

3rd August, 2026

Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,485.03	276.97	0.53%
S&P 500	7,489.72	52.09	0.70%
NASDAQ 100	28,274.20	167.85	0.60%
FTSE 100	10,868.05	-29.22	-0.27%
NIKKIE (8:00 AM)	63,357.50	-1,004.52	-1.56%
HANG SENG (8:00 AM)	25,878.00	-6.43	-0.02%
GOLD	4,110.51	3.51	0.09%
SILVER	58.31	0.52	0.91%
BRENT OIL	83.75	-4.18	-4.75%
DOLLAR INDEX	99.58	-0.21	-0.21%
USD/INR	95.29	-0.09	-0.10%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** ended higher on Friday as Amazon's strong quarterly results boosted confidence in AI-related stocks. However, Apple declined after its earnings disappointed investors, limiting gains in the broader technology sector.
- **Asian markets** traded cautiously on Monday, with South Korea's KOSPI slipping as heavyweight semiconductor stocks witnessed profit booking following Friday's sharp rally, while investors pared leverage-backed positions.
- **Crude oil** prices declined as optimism over easing tensions in the Middle East improved the global risk outlook.
- **GIFT Nifty** trading at ~24,623.00 is indicating a positive start for the Indian market on Monday.

MARKET SNAPSHOT

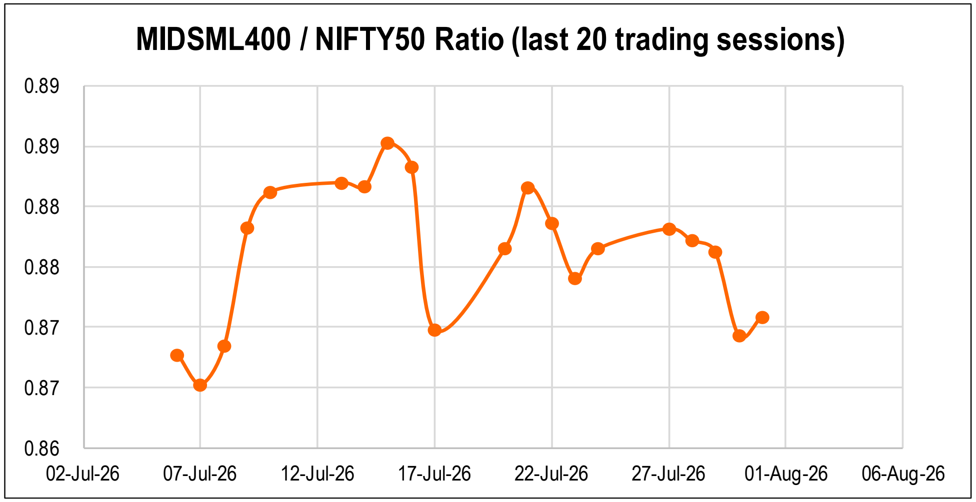
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,383.60	66.45	0.27%
SENSEX	78,094.64	166.49	0.21%
BANK NIFTY	57,264.85	117.35	0.21%
FIN NIFTY	26,594.05	342.80	1.31%
MIDCAP NIFTY	14,784.40	107.75	0.73%
NIFTY SMLCAP 250	17,919.90	74.30	0.42%
INDIA VIX	11.76	-0.40	-3.29%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	28	21	1
NIFTY 500	295	203	2
NIFTY F&O	133	74	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	31	62%
NIFTY 500	285	57%

Highlights

- Nifty extended its positive momentum, holding above the 24,300 level and registering gains for another session.
- Bajaj Finance hit a fresh 52-week high, gaining 8.32%, while continued strength in Auto stocks supported the broader market. IT stocks witnessed profit booking after their recent rally.
- FIIs remained net sellers in July. However, the intensity of selling is seen diminishing on a MoM basis since March 2026.



Dr Reddy's Laboratories

The company has received approval from the US Food and Drug Administration (FDA) for Rituximab, a biosimilar to Rituxan, for the US market. Rituximab is widely used to treat several B-cell malignancies, including non-Hodgkin lymphoma and chronic lymphocytic leukemia, as well as certain autoimmune conditions.

Lupin

The company has received approval under the Federal Food, Drug, and Cosmetic Act (FD&C Act) for Diazepam Injection USP, 10 mg/2 mL (5 mg/mL), in single-dose prefilled syringes. The US FDA has approved Lupin's Diazepam Injection, which is bioequivalent to the reference listed drug (RLD), Valium Injection, manufactured by Hoffmann-La Roche Inc. It is indicated for the management of anxiety disorders or the short-term relief of anxiety symptoms.

Sterlite Technologies (STL)

The company has received a multi-year supply agreement worth Rs 960 crore for the supply of fibre cables to a domestic telecom operator.

Bharat Electronics

Bharat Electronics (BEL) has secured additional orders worth Rs 847 crore since July 13. The major orders include electro-optics, a security operations centre, seekers, components, spares, and services.

Investors will have to adjust to new stock market trading timings from Monday, August 3, as the Securities and Exchange Board of India (SEBI) rolls out its revised trading framework. In Equity Derivatives segment, trading has been extended by 10 minutes and will now continue until 3:40pm.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

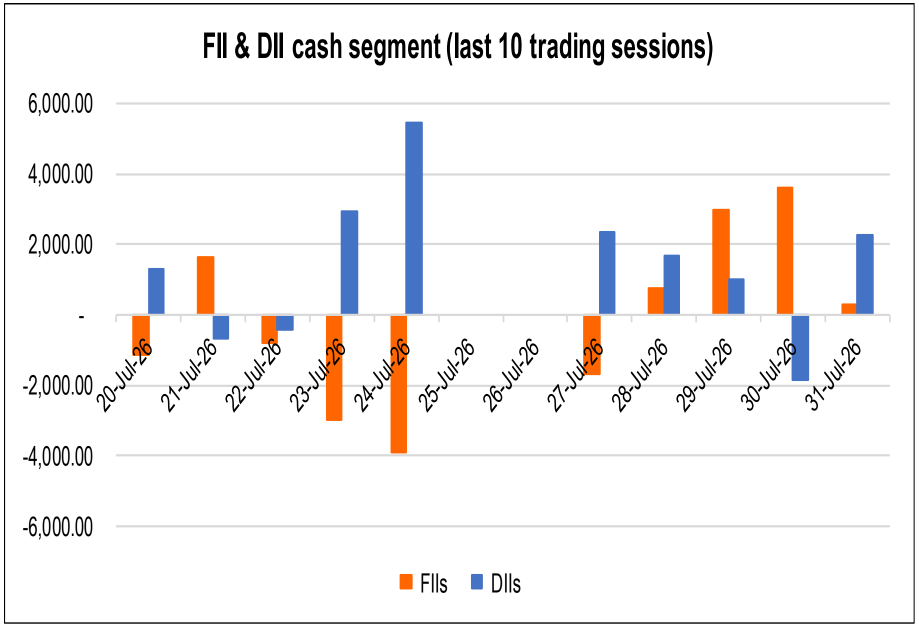
BOBCAPS
TRUST | INNOVATION | EXCELLENCE

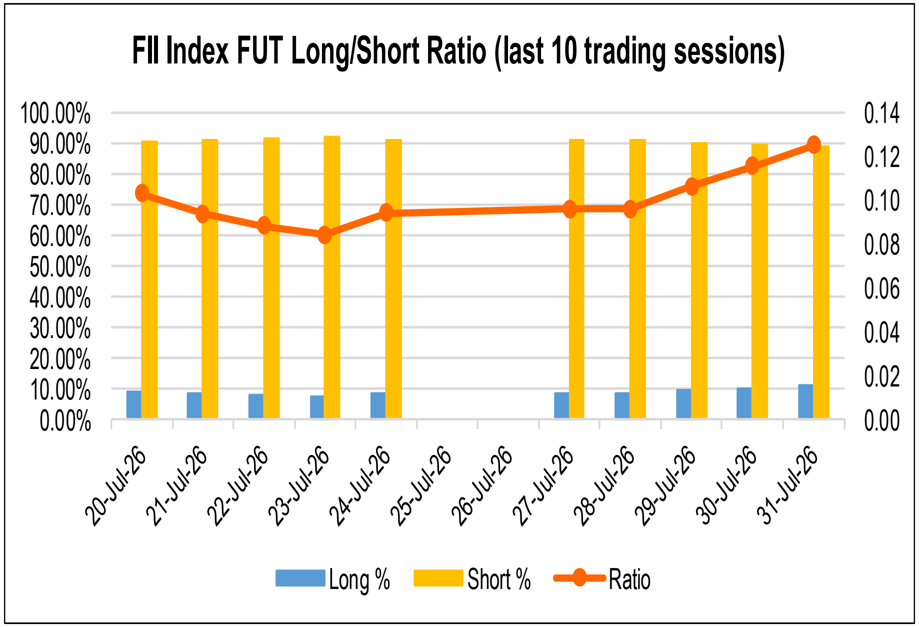
*INR in Crores

Cash Segment	31-Jul-2026	MTD	YTD
FII Net Flows	277.48	-5,778.99	-3,51,522.82
DII Net Flows	2,260.37	35,099.25	5,05,236.41

*INR in Crores

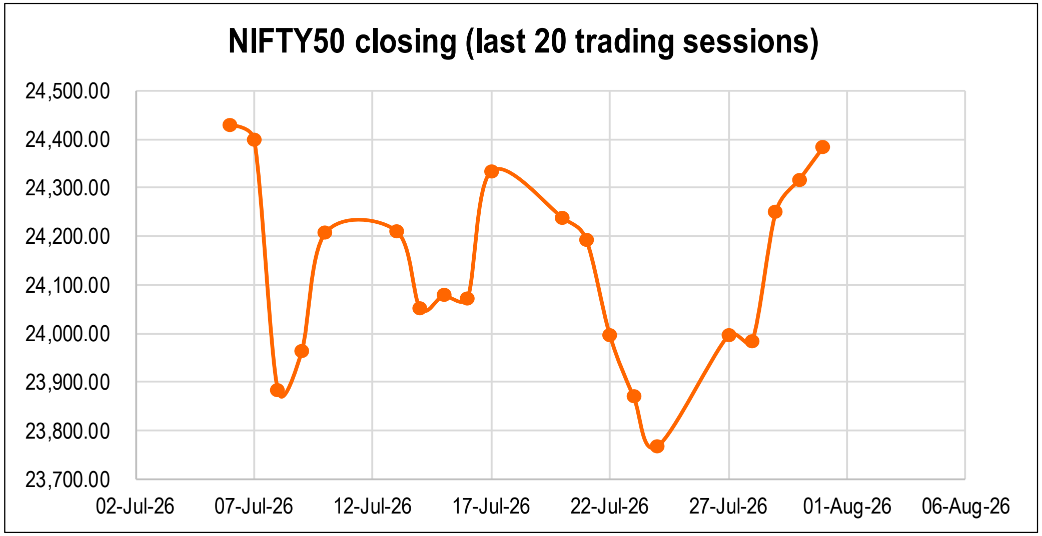
FIIs F&O Flows	31-Jul-2026	MTD
Index Futures	2,150.40	668.11
Index Options	448.98	-2,16,446.82
Stock Futures	1,947.00	16,315.92
Stock Options	-56.95	-3,060.12



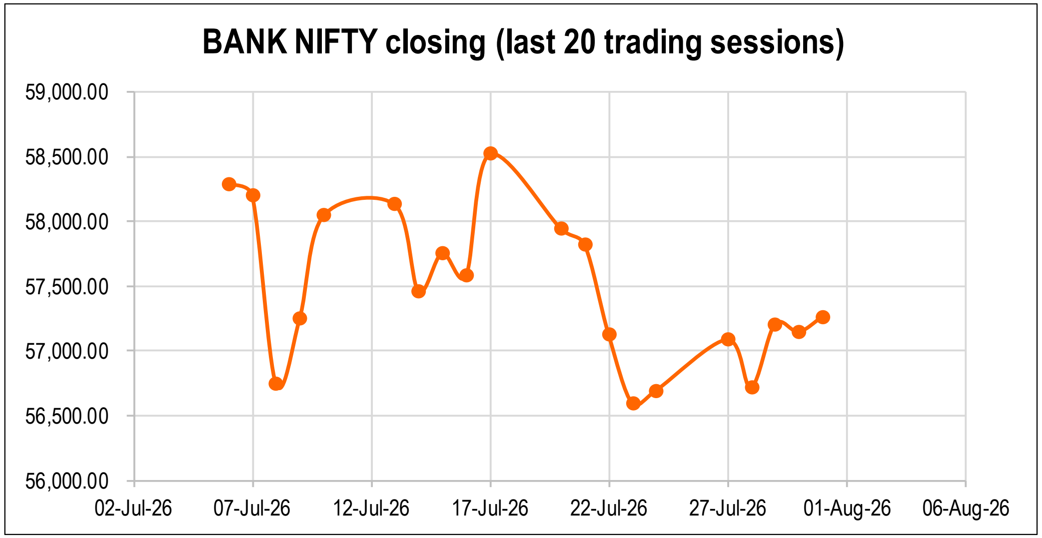


BOBCAPS
TRUST | INNOVATION | EXCELLENCE

NIFTY	
Spot	24383.60
Futures	24452.60
Highest CE OI (25th AUG)	24000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.14
Key Supply Zones	24600, 25150
Key Demand Zones	24200, 24000



BANK NIFTY	
Spot	57264.85
Futures	57425.20
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.85
Key Supply Zones	57500, 58200
Key Demand Zones	56800, 56000



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Media	1,618.65	2.09%	3.50%	7.03%	12.04%
Nifty Auto	28,744.15	1.64%	3.94%	6.51%	1.97%
Nifty Financial Services	26,594.05	1.31%	1.79%	-1.05%	-3.69%
Nifty Energy	38,729.55	1.09%	-0.26%	-1.15%	9.64%
Nifty Oil & Gas	11,247.70	1.08%	1.52%	1.00%	-8.04%
Nifty Pharma	26,534.80	0.72%	2.27%	3.07%	16.77%
Nifty Infrastructure	9,409.25	0.69%	1.16%	-0.68%	-2.15%
Nifty PSU Bank	8,367.20	0.47%	0.04%	-0.48%	-1.94%
Nifty Healthcare	16,755.50	0.33%	1.72%	1.91%	14.45%
Nifty Realty	901.45	0.22%	-0.05%	1.20%	2.68%
Nifty Bank	57,264.85	0.21%	0.31%	-1.16%	-3.89%
Nifty Metal	12,719.00	0.14%	1.94%	0.96%	13.89%
Nifty Private Bank	27,522.65	0.03%	0.47%	-2.46%	-4.17%
Nifty Consumer Durables	40,072.15	-0.44%	2.41%	8.80%	9.02%
Nifty FMCG	49,121.20	-1.05%	-0.89%	-1.95%	-11.45%
Nifty IT	30,708.95	-1.56%	4.30%	11.92%	-18.94%

Sector View

Nifty Pharma Index touched a new all-time high after breaking out of a three-week consolidation, ending the week with gains of nearly 4%. The breakout reinforces the prevailing bullish trend and reflects sustained buying interest across the sector. On a month-on-month basis, the index has advanced for four consecutive months, highlighting strong medium-term momentum and continued relative outperformance.

Stocks to watch

ASHOKLEY, CHOLAFIN, JIOFIN, JSWENERGY.

Stocks in F&O ban list

Nil.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

BOBCAPS
TRUST | INNOVATION | EXCELLENCE

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3009.50	-1.30	3105.14	3026.69	2434.93
ADANIPORTS	1696.50	1.95	1796.27	1807.27	1574.53
APOLLOHOSP	8957.00	-0.34	8878.00	8612.02	7754.72
ASIANPAINT	2747.30	0.04	2695.61	2689.52	2586.25
AXISBANK	1229.50	0.05	1277.22	1304.07	1284.74
BAJAJ_AUTO	11520.50	0.77	10672.57	10361.66	9635.54
BAJAJFINSV	2029.10	6.27	1892.49	1812.13	1916.13
BAJFINANCE	1141.20	8.32	1042.13	979.11	972.51
BEL	387.85	0.77	405.67	410.83	420.31
BHARTIARTL	1972.00	0.78	1926.55	1880.01	1952.03
CIPLA	1473.20	0.46	1437.41	1417.77	1407.90
COALINDIA	414.15	-0.73	425.77	442.67	425.81
DRREDDY	1148.10	0.29	1219.13	1269.18	1261.29
EICHERMOT	7833.50	-1.00	7574.00	7415.54	7241.81
ETERNAL	302.45	-2.64	291.75	269.59	275.05
GRASIM	3100.80	-0.13	3135.50	3130.96	2878.24
HCLTECH	1346.90	-0.43	1229.10	1175.99	1415.04
HDFCBANK	748.15	-0.77	784.51	776.81	875.26
HDFCLIFE	548.50	0.57	559.37	573.75	669.04
HINDALCO	974.45	0.42	959.47	1009.26	933.54
HINDUNILVR	2101.30	-0.31	2135.26	2150.86	2278.91
ICICIBANK	1435.40	0.10	1425.76	1358.28	1349.04
INDIGO	5171.00	-1.14	5216.48	4968.19	4953.65
INFY	1130.10	-2.16	1083.98	1108.98	1356.21
ITC	281.00	-1.42	282.27	286.29	333.33

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	256.46	3.85	239.44	238.58	263.67
JSWSTEEL	1270.00	-0.06	1246.92	1262.22	1207.99
KOTAKBANK	390.30	0.23	382.69	388.73	403.89
LT	3938.90	0.03	3871.74	3983.59	3965.23
M&M	3398.50	3.50	3184.80	3116.92	3364.58
MARUTI	14234.00	0.32	13814.15	13567.00	14607.82
MAXHEALTH	1098.50	-2.34	1101.87	1065.73	1059.45
NESTLEIND	1509.60	-0.73	1459.92	1428.73	1323.60
NTPC	347.25	0.70	347.41	358.40	357.10
ONGC	242.53	0.39	245.73	251.70	259.14
POWERGRID	284.25	-0.51	285.03	287.24	286.10
RELIANCE	1307.80	1.15	1294.61	1305.31	1409.49
SBILIFE	1882.00	0.24	1844.46	1813.02	1922.72
SBIN	1027.40	0.20	1028.30	1013.35	1023.34
SHRIRAMFIN	1046.70	1.90	1037.94	997.55	945.38
SUNPHARMA	1990.50	-0.53	1948.26	1877.14	1773.16
TATACONSUM	1083.10	-1.01	1096.85	1117.25	1141.06
TATASTEEL	189.69	1.48	186.89	195.08	191.16
TCS	2365.60	-2.72	2224.32	2200.29	2694.76
TECHM	1651.30	-1.06	1536.89	1486.11	1494.80
TITAN	4875.20	0.52	4670.84	4408.27	4146.26
TMPV	339.75	1.66	333.43	357.41	359.61
TRENT	3005.90	0.22	2934.72	2959.78	2800.46
ULTRACEMCO	11903.00	0.47	11775.20	11499.04	11812.84
WIPRO	183.65	-1.44	177.16	183.35	217.14

DISCLAIMER

Name of the Research Entity: BOB Capital Markets Limited
Registered office Address: 1704, B Wing, Parinee Crescenzo, G Block, BKC, Bandra East, Mumbai 400051
SEBI Research Analyst Registration No: INH000000040 (Perpetual)
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/
CIN: U65999MH1996GOI098009

Investments in securities market are subject to market risks. Read all the related documents carefully before investing.
Registration granted by SEBI and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.

DISCLAIMER

Analyst certification

Each of the analysts mentioned in this research report certify, with respect to the sections of the report for which they are responsible, that (1) all of the views expressed in this report accurately reflect his/her personal views about the subject company or companies and its or their securities, and (2) no part of his/her compensation was, is, or will be, directly or indirectly, related to the specific recommendation(s) or view(s) in this report. Analysts are not registered as research analysts by FINRA and are not associated persons of BOB Capital Markets Limited (BOBCAPS).

Important disclosures

This product is a compilation of previously published research notes. To view the complete report along with the associated Analyst certifications and Company-specific disclosures, please click on the hyperlink accompanying each excerpt.

General disclaimers

BOBCAPS is engaged in the business of Stock Broking and Investment Banking. BOBCAPS is a member of the National Stock Exchange of India Limited and BSE Limited and is also a SEBI-registered Category I Merchant Banker. BOBCAPS is a wholly owned subsidiary of Bank of Baroda which has its various subsidiaries engaged in the businesses of stock broking, lending, asset management, life insurance, health insurance and wealth management, among others. BOBCAPS's activities have neither been suspended nor has it defaulted with any stock exchange authority with whom it has been registered in the last five years. BOBCAPS has not been debarred from doing business by any stock exchange or SEBI or any other authority. No disciplinary action has been taken by any regulatory authority against BOBCAPS affecting its equity research analysis activities. BOBCAPS prohibits its analysts, persons reporting to analysts, and members of their households from maintaining a financial interest in the securities or derivatives of any companies that the analysts cover. Additionally, BOBCAPS prohibits its analysts and persons reporting to analysts from serving as an officer, director, or advisory board member of any companies that the analysts cover. Our salespeople, traders, and other professionals may provide oral or written market commentary or trading strategies to our clients that reflect opinions contrary to the opinions expressed herein, and our proprietary trading and investing businesses may make investment decisions that are inconsistent with the recommendations expressed herein. In reviewing these materials, you should be aware that any or all of the foregoing, among other things, may give rise to real or potential conflicts of interest. Additionally, other important information regarding our relationships with the company or companies that are the subject of this material is provided herein. This material should not be construed as an offer to sell or the solicitation of an offer to buy any security in any jurisdiction We are not soliciting any action based on this material. It is for the general information of BOBCAPS's clients. It does not constitute a personal recommendation or take into account the particular investment objectives, financial situations, or needs of individual clients. Before acting on any advice or recommendation in this material, clients should consider whether it is suitable for their particular circumstances and, if necessary, seek professional advice. BOBCAPS research reports follow rules laid down by Securities and Exchange Board of India and individuals employed as research analysts are separate from other employees who are performing sales trading, dealing, corporate finance advisory or any other activity that may affect the independence of its research reports. The price and value of the investments referred to in this material and the income from them may go down as well as up, and investors may realize losses on any investments. Past performance is not a guide for future performance, future returns are not guaranteed and a loss of original capital may occur. BOBCAPS does not provide tax advice to its clients, and all investors are strongly advised to consult with their tax advisers regarding any potential investment in certain transactions — including those involving futures, options, and other derivatives as well as non-investment-grade securities — that give rise to substantial risk and are not suitable for all investors. The material is based on information that we consider reliable, but we do not represent that it is accurate or complete, and it should not be relied on as such. Opinions expressed are our current opinions as of the date appearing on this material only. We endeavour to update on a reasonable basis the information discussed in this material, but regulatory, compliance, or other reasons may prevent us from doing so. We and our affiliates, officers, directors, and employees, including persons involved in the preparation or issuance of this material, may from time to time have "long" or "short" positions in, act as principal in, and buy or sell the securities or derivatives thereof of companies mentioned herein and may from time to time add to or dispose of any such securities (or investment). We and our affiliates may assume an underwriting commitment in the securities of companies discussed in this document (or in related investments), may sell them to or buy them from customers on a principal basis, and may also perform or seek to perform investment banking or advisory services for or relating to these companies and may also be represented in the supervisory board or any other committee of these companies. For the purpose of calculating whether BOBCAPS and its affiliates hold, beneficially own, or control, including the right to vote for directors, one per cent or more of the equity shares of the subject company, the holdings of the issuer of the research report is also included. BOBCAPS and its non-US affiliates may, to the extent permissible under applicable laws, have acted on or used this research to the extent that it relates to non-US issuers, prior to or immediately following its publication. Foreign currency denominated securities are subject to fluctuations in exchange rates that could have an adverse effect on the value or price of or income derived from the investment. In addition, investors in securities such as ADRs, the value of which are influenced by foreign currencies, effectively assume currency risk. In addition, options involve risks and are not suitable for all investors. Please ensure that you have read and understood the Risk disclosure document before entering into any derivative transactions. No part of this material may be (1) copied, photocopied, or duplicated in any form by any means or (2) redistributed without BOBCAPS's prior written consent. Company-specific disclosures under SEBI (Research Analysts) Regulations, 2014. The research analyst(s) or his/her relatives do not have any material conflict of interest at the time of publication of this research report. BOBCAPS or its research analyst(s) or his/her relatives do not have any financial interest in the subject company. BOBCAPS or its research analyst(s) or his/her relatives do not have actual/beneficial ownership of one per cent or more securities in the subject company at the end of the month immediately preceding the date of publication of this report. The research analyst(s) has not received any compensation from the subject company or third party in the past 12 months in connection with research report/activities. Compensation of the research analyst(s) is not based on any specific merchant banking, investment banking or brokerage service transactions. BOBCAPS or its research analyst(s) is not engaged in any market making activities for the subject company. The research analyst(s) has not served as an officer, director or employee of the subject company. BOBCAPS or its associates may have material conflict of interest at the time of publication of this research report. BOBCAPS's associates may have financial interest in the subject company. BOBCAPS's associates may hold actual / beneficial ownership of one per cent or more securities in the subject company at the end of the month immediately preceding the date of publication of this report. BOBCAPS or its associates may have managed or co-managed a public offering of securities for the subject company or may have been mandated by the subject company for any other assignment in the past 12 months.

BOBCAPS may have received compensation from the subject company in the past 12 months. BOBCAPS may from time to time solicit or perform investment banking services for the subject company. BOBCAPS or its associates may have received compensation from the subject company in the past 12 months for services in respect of managing or co-managing public offerings, corporate finance, investment banking or merchant banking, brokerage services or other advisory services in a merger or specific transaction. BOBCAPS or its associates may have received compensation for products or services other than investment banking or merchant banking or brokerage services from the subject company in the past 12 months.

Other disclaimers

BOBCAPS and MAYBANK (as defined below) make no representation or warranty, express or implied, as to the accuracy or completeness of any information obtained from third parties and expressly disclaim the merchantability, suitability, quality and fitness of this report. The information in this report has not been independently verified, is provided on an "as is" basis, should not be relied on by you in connection with any contract or commitment, and should not be used as a substitute for enquiries, procedures and advice which ought to be undertaken by you. This report also does not constitute an offer or solicitation to buy or sell any securities referred to herein and you should not construe this report as investment advice. All opinions and estimates contained in this report constitute BOBCAPS's judgment as of the date of this report and are subject to change without notice, and there is no obligation on BOBCAPS or MAYBANK to update this report upon issuance. This report and the information contained herein may not be reproduced, redistributed, disseminated or copied by any means without the prior consent of BOBCAPS and MAYBANK. To the full extent permitted by law neither BOBCAPS, MAYBANK nor any of their respective affiliates, nor any other person, accepts any liability howsoever arising, whether in contract, tort, negligence, strict liability or any other basis, including without limitation, direct or indirect, special, incidental, consequential or punitive damages arising from any use of this report or the information contained herein. By accepting this report, you agree and undertake to fully indemnify and hold harmless BOBCAPS and MAYBANK from and against claims, charges, actions, proceedings, losses, liabilities, damages, expenses and demands (collectively, the "Losses") which BOBCAPS and/or MAYBANK may incur or suffer in any jurisdiction including but not limited to those Losses incurred by BOBCAPS and/or MAYBANK as a result of any proceedings or actions brought against them by any regulators and/or authorities, and which in any case are directly or indirectly occasioned by or result from or are attributable to anything done or omitted in relation to or arising from or in connection with this report.

Distribution into the United Kingdom ("UK"):

This research report will only be distributed in the United Kingdom, in accordance with the applicable laws and regulations of the UK, by Maybank Securities (London) Ltd) ("MSL") who is authorised and regulated by the Financial Conduct Authority ("FCA") in the United Kingdom (MSL and its affiliates are collectively referred to as "MAYBANK"). BOBCAPS is not authorized to directly distribute this research report in the UK. This report has not been prepared by BOBCAPS in accordance with the UK's legal and regulatory requirements. This research report is for distribution only to, and is solely directed at, selected persons on the basis that those persons: (a) are eligible counterparties and professional clients of MAYBANK as selected by MAYBANK solely at its discretion; (b) have professional experience in matters relating to investments falling within Article 19(5) of the Financial Services and Markets Act 2000 (Financial Promotion) Order 2005, as amended from time to time (the "Order"), or (c) fall within Article 49(2)(a) to (d) (high net worth companies, unincorporated associations, etc. as mentioned in the stated Article) of the Order; (all such persons together being referred to as "relevant persons"). This research report is directed only at relevant persons and must not be acted on or relied on by any persons who are not relevant persons. Any investment or investment activity to which this material relates is available only to relevant persons and will be engaged in only with relevant persons. The relevant person as recipient of this research report is not permitted to reproduce, change, remove, pass on, distribute or disseminate the data or make it available to third parties without the written permission of BOBCAPS or MAYBANK. Any decision taken by the relevant person(s) pursuant to the research report shall be solely at their costs and consequences and BOBCAPS and MAYBANK shall not have any liability of whatsoever nature in this regard.

No distribution into the US:

This report will not be distributed in the US and no US person may rely on this communication.

Other jurisdictions:

This report has been prepared in accordance with SEBI (Research Analysts) Regulations and not in accordance with local regulatory requirements of any other jurisdiction. In any other jurisdictions, this report is only for distribution (subject to applicable legal or regulatory restrictions) to professional, institutional or sophisticated investors as defined in the laws and regulations of such jurisdictions by Maybank Securities Pte Ltd. (Singapore) and / or by any broker-dealer affiliate or such other affiliate as determined by Malayan Banking Berhad. If the recipient of this report is not as specified above, then it should not act upon this report and return the same to the sender. By accepting this report, you agree to be bound by the foregoing limitations.