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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,594.14	-1,153.18	-2.19%
S&P 500	7,316.15	-112.63	-1.52%
NASDAQ 100	27,192.31	-570.83	-2.06%
FTSE 100	10,908.41	37.39	0.34%
NIKKIE (8:00 AM)	62,186.00	751.81	1.22%
HANG SENG (8:00 AM)	25,826.00	18.08	0.07%
GOLD	4,078.20	41.90	1.04%
SILVER	58.32	0.23	0.39%
BRENT OIL	86.87	-1.22	-1.38%
DOLLAR INDEX	100.77	0.04	0.04%
USD/INR	95.75	0.10	0.10%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- Wall Street ended sharply lower on Wednesday after the Federal Reserve kept interest rates unchanged. Continued weakness in AI-related semiconductor stocks ahead of earnings from Microsoft and Meta Platforms further weighed on sentiment, with the **Nasdaq 100** extending its correction to around 11% from its June record high. **Asian markets** traded mixed on Thursday as investors remained cautious after this week's sharp decline in global technology stocks.

- After bouncing by more than 7% during the previous session, **Crude oil** prices eased earlier on Thursday.

- **GIFT Nifty** trading at ~24,223.00 is indicating a negative start for the Indian market on Thursday.

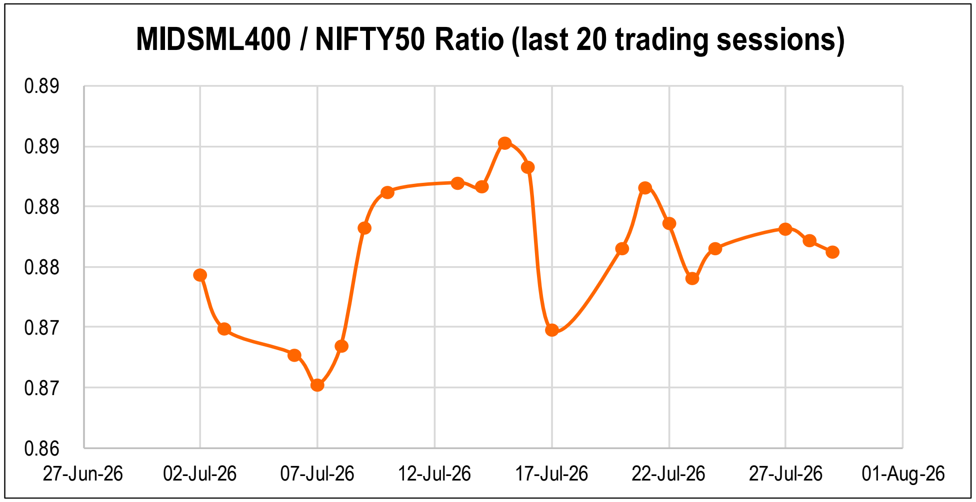
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,250.20	264.85	1.10%
SENSEX	77,654.60	888.68	1.16%
BANK NIFTY	57,205.90	450.30	0.79%
FIN NIFTY	26,287.10	262.90	1.01%
MIDCAP NIFTY	14,683.05	142.00	0.98%
NIFTY SMLCAP 250	17,978.05	236.60	1.33%
INDIA VIX	12.03	-0.54	-4.26%

Highlights

- Nifty extended its recovery and tested the 24,250 level, supported by sustained buying across key sectors.
- Metal stocks rebounded after a phase of consolidation, while the Pharma index broke out of a month-long range to register a fresh all-time high.
- Rising geopolitical tensions and weakness in the US markets may keep investors cautious, with global cues likely to influence the near-term direction of the domestic market.

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	38	12	0
NIFTY 500	372	126	2
NIFTY F&O	147	59	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	30	60%
NIFTY 500	298	60%



INDIA KEY NEWS

Punjab National Bank

The Board has approved raising foreign currency funds through the establishment of a Medium-Term Note (MTN) Programme of up to $1.5 billion and the issuance of bonds thereunder through PNB's IFSC Banking Unit at GIFT City.

NBCC (India)

NBCC has signed a formal agreement with the Government of the Republic of Seychelles for the construction of the Ile Aurore Housing Project, worth $75 million, in Seychelles. The project comprises 1,008 affordable housing units along with the associated infrastructure.

*Source: moneycontrol.com

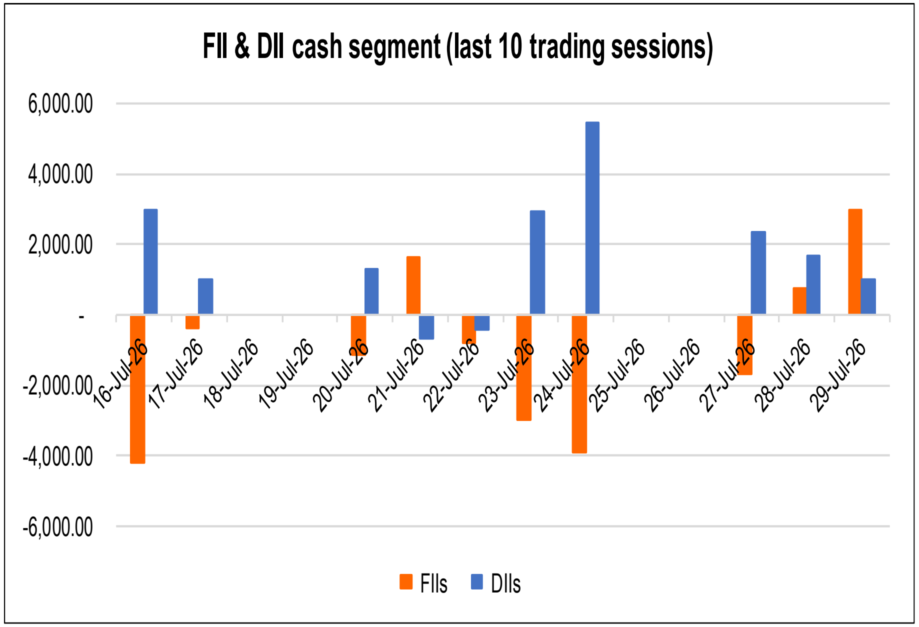
INSTITUTIONAL ACTIVITY

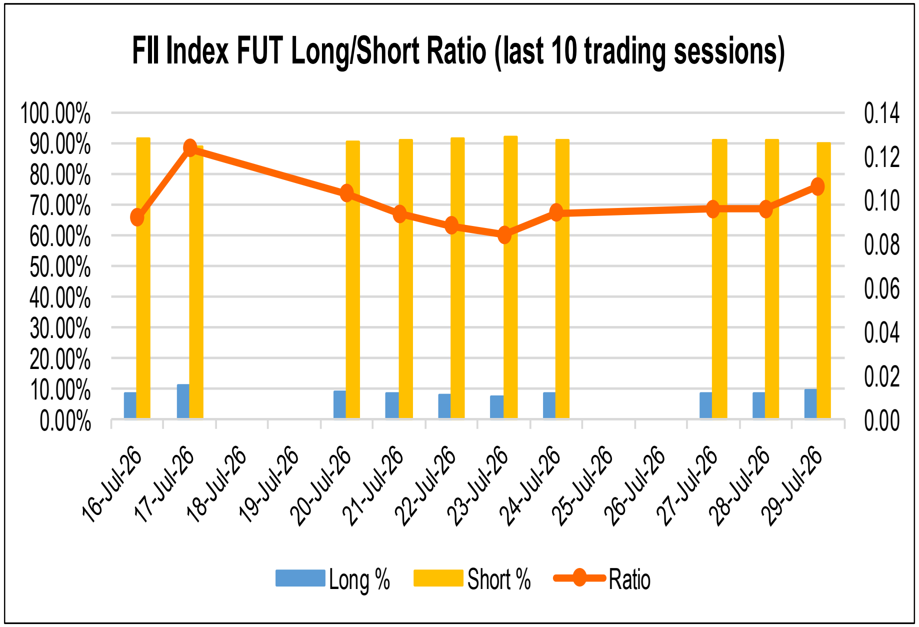
*INR in Crores

Cash Segment	29-Jul-2026	MTD	YTD
FII Net Flows	2,981.87	-9,679.98	-3,55,423.81
DII Net Flows	998.02	34,702.91	5,04,840.07

*INR in Crores

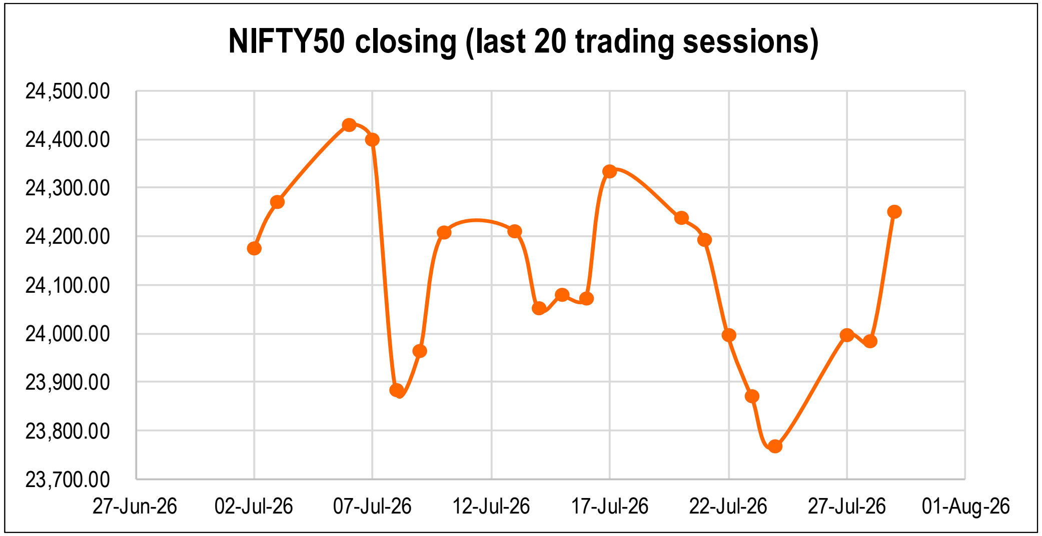
FIIs F&O Flows	29-Jul-2026	MTD
Index Futures	1,711.14	-2,781.86
Index Options	6,895.88	-2,08,487.93
Stock Futures	3,263.12	14,605.53
Stock Options	310.66	-2,826.12





INDEX VIEW

NIFTY	
Spot	24250.20
Futures	24311.50
Highest CE OI (25th AUG)	24000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.13
Key Supply Zones	24350, 24600
Key Demand Zones	24000, 23800



BANK NIFTY	
Spot	57205.90
Futures	57344.40
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.89
Key Supply Zones	57500, 58200
Key Demand Zones	56500, 55500

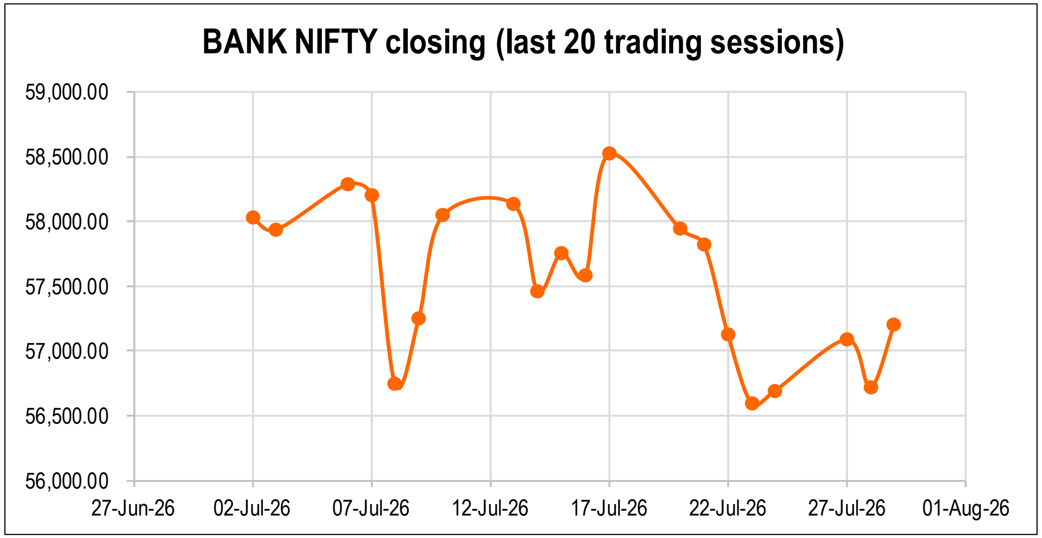


CHART OF THE DAY

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Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
JSWSTEEL	Bullish	1276.60	1195	1353 | 1429	Up to 3 months

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty IT	31,123.10	2.32%	9.08%	20.77%	-17.85%
Nifty Metal	12,686.80	2.31%	1.74%	2.36%	13.60%
Nifty FMCG	49,690.65	1.66%	1.34%	-0.23%	-10.43%
Nifty Pharma	26,373.35	1.44%	2.81%	4.73%	16.06%
Nifty Consumer Durables	40,117.25	1.43%	2.85%	10.07%	9.14%
Nifty Media	1,580.85	1.43%	5.43%	4.76%	9.42%
Nifty Healthcare	16,696.30	1.20%	2.46%	3.96%	14.05%
Nifty Private Bank	27,563.45	1.03%	1.03%	-2.18%	-4.03%
Nifty Financial Services	26,287.10	1.01%	1.14%	-1.91%	-4.80%
Nifty Bank	57,205.90	0.79%	1.08%	-1.43%	-3.99%
Nifty Infrastructure	9,316.10	0.67%	0.39%	-1.33%	-3.12%
Nifty PSU Bank	8,317.15	0.40%	0.24%	-3.03%	-2.53%
Nifty Oil & Gas	11,076.30	0.08%	-0.47%	-0.07%	-9.44%
Nifty Energy	38,180.55	0.02%	-2.21%	-3.98%	8.08%
Nifty Auto	27,825.95	-0.06%	1.11%	3.89%	-1.29%
Nifty Realty	918.45	-0.33%	3.58%	6.89%	4.61%

Sector View

Nifty IT Index has rallied for four consecutive sessions and is now testing the 31,300 resistance zone, where it formed a Long-Legged Doji candlestick on the daily chart. The pattern reflects indecision at higher levels, suggesting buyers may be turning cautious after the recent sharp up move. Unless the index registers a decisive breakout above the resistance, the possibility of a short-term pullback or consolidation cannot be ruled out.

Stocks to watch

AUROPHARMA, CROMPTON, GLENMARK, HINDALCO.

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	3024.50	0.74	3121.69	3014.11	2429.21
ADANIPORTS	1719.70	-3.10	1816.11	1810.77	1571.69
APOLLOHOSP	8935.00	0.36	8860.23	8575.21	7741.80
ASIANPAINT	2758.40	0.81	2695.05	2683.64	2582.19
AXISBANK	1235.40	0.97	1289.54	1304.66	1284.28
BAJAJ_AUTO	11338.00	-0.32	10507.07	10315.96	9609.26
BAJAJFINSV	1924.40	-0.18	1883.13	1803.80	1916.67
BAJFINANCE	1054.40	0.57	1034.88	972.15	971.74
BEL	387.55	-0.37	408.69	412.10	420.52
BHARTIARTL	1950.20	2.54	1919.38	1877.80	1951.75
CIPLA	1474.30	2.06	1436.14	1415.17	1408.24
COALINDIA	410.05	-0.02	428.09	444.36	425.49
DRREDDY	1142.30	0.59	1240.47	1276.47	1262.24
EICHERMOT	7779.00	-0.73	7516.17	7375.26	7232.37
ETERNAL	311.80	1.12	289.16	267.14	275.38
GRASIM	3113.00	-0.10	3142.73	3124.98	2875.14
HCLTECH	1344.30	1.95	1204.97	1168.98	1415.98
HDFCBANK	748.20	1.74	789.25	777.21	877.56
HDFCLIFE	556.70	-0.37	561.63	576.18	671.09
HINDALCO	962.45	2.78	957.35	1013.03	931.50
HINDUNILVR	2117.80	4.70	2145.39	2155.52	2282.56
ICICIBANK	1437.90	0.50	1422.87	1350.46	1348.42
INDIGO	5276.50	0.11	5239.93	4930.06	4958.13
INFY	1155.60	4.51	1074.12	1111.09	1359.55
ITC	286.25	0.56	282.96	287.33	334.50

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	249.48	5.23	238.22	237.87	264.22
JSWSTEEL	1276.60	2.38	1242.58	1262.78	1206.80
KOTAKBANK	390.20	1.27	383.50	388.44	404.23
LT	3931.40	2.59	3882.21	3982.69	3963.14
M&M	3221.80	-1.51	3166.30	3107.57	3365.76
MARUTI	13948.00	1.06	13828.75	13517.74	14626.31
MAXHEALTH	1111.40	0.60	1104.75	1064.15	1059.71
NESTLEIND	1503.30	0.77	1453.70	1425.15	1320.23
NTPC	343.50	-0.07	348.54	360.19	357.00
ONGC	238.31	-0.25	245.22	253.92	259.15
POWERGRID	282.85	-0.86	285.34	287.82	286.12
RELIANCE	1275.90	0.65	1294.95	1306.94	1410.25
SBILIFE	1894.90	0.31	1835.14	1812.74	1921.71
SBIN	1013.70	0.05	1030.25	1010.29	1021.69
SHRIRAMFIN	1044.70	0.37	1040.76	993.08	941.68
SUNPHARMA	1989.90	0.67	1937.47	1872.56	1769.63
TATACONSUM	1096.10	1.29	1099.18	1122.10	1141.38
TATASTEEL	187.27	2.54	186.93	195.87	190.99
TCS	2446.60	2.03	2192.53	2197.43	2700.78
TECHM	1644.20	0.55	1512.45	1477.83	1492.68
TITAN	4850.20	0.01	4631.69	4377.94	4132.55
TMPV	329.80	1.66	334.24	358.38	360.41
TRENT	3005.20	2.54	2967.39	2948.61	2801.45
ULTRACEMCO	11998.00	0.35	11750.65	11479.58	11814.97
WIPRO	183.61	1.37	176.16	183.80	217.73

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