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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,208.06	613.92	1.19%
S&P 500	7,437.63	121.48	1.66%
NASDAQ 100	28,106.35	914.04	3.36%
FTSE 100	10,897.27	-11.14	-0.10%
NIKKIE (8:00 AM)	64,580.00	2,712.57	4.38%
HANG SENG (8:00 AM)	25,842.00	-16.88	-0.07%
GOLD	4,082.00	-18.10	-0.44%
SILVER	58.96	-0.06	-0.11%
BRENT OIL	85.81	-1.07	-1.23%
DOLLAR INDEX	100.01	0.28	0.28%
USD/INR	95.53	-0.15	-0.16%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** ended sharply higher on Thursday, led by a strong rally in semiconductor stocks after Microsoft delivered a stellar outlook. The technology giant posted its biggest single-day gain in 18 years, easing concerns over heavy AI infrastructure spending and reigniting optimism around the artificial intelligence theme. **Asian markets** extended the positive momentum on Friday, with South Korea's KOSPI surging sharply to recover from the steep losses seen earlier this week.

- The **U.S. Dollar** Index has declined 1.76% over the last three sessions from its recent swing high of 101.64, indicating broad-based weakness in the U.S. Dollar.

- **GIFT Nifty** trading at ~24,428.50 is indicating a positive start for the Indian market on Friday.

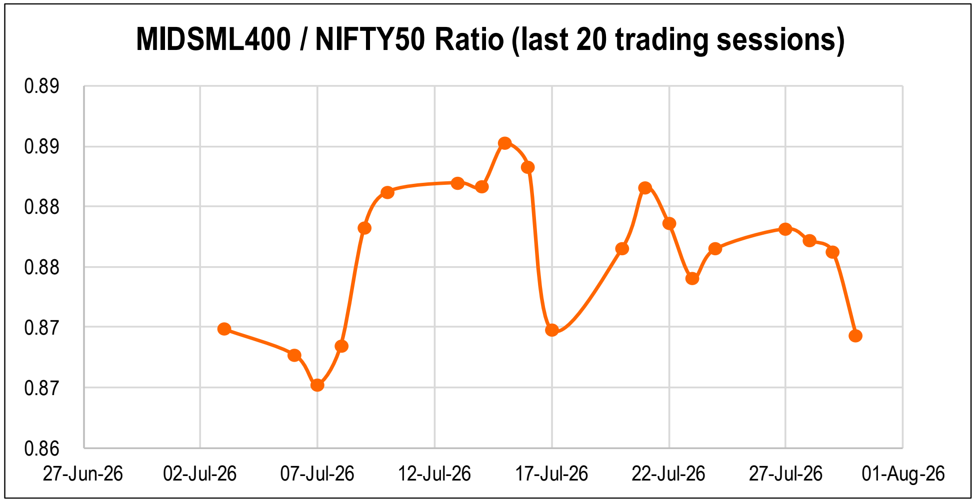
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,317.15	66.95	0.28%
SENSEX	77,928.15	273.55	0.35%
BANK NIFTY	57,147.50	-58.40	-0.10%
FIN NIFTY	26,251.25	-35.85	-0.14%
MIDCAP NIFTY	14,676.65	-6.40	-0.04%
NIFTY SMLCAP 250	17,845.60	-132.45	-0.74%
INDIA VIX	12.16	0.15	1.25%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	25	25	0
NIFTY 500	164	336	0
NIFTY F&O	83	125	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	31	62%
NIFTY 500	280	56%

Highlights

- Nifty extended its rally for the fifth straight session, climbing above the 24,300 mark and strengthening the near-term bullish outlook.
- The benchmark has rebounded by over 700 points from the 23,600 support zone, indicating sustained buying interest at lower levels.
- Auto stocks led the market advance, with Mahindra & Mahindra emerging as the top gainer on the Nifty 50.



Navin Fluorine International

The company has signed an agreement with the Defence Research and Development Organisation (DRDO) for the bulk manufacturing of sodium borohydride, with the aim of accelerating the indigenous process development of a critical defence material.

Sapphire Foods India

Fidelity Funds India Focus Fund purchased an additional 20.22 lakh shares, representing a 0.62 percent stake in Sapphire Foods India, for Rs 39.58 crore at Rs 195.7 per share. The Government of Singapore sold 18.95 lakh shares, or a 0.58 percent stake, in Sapphire Foods India for Rs 37.1 crore at Rs 195.71 per share. As of June 2026, Fidelity Funds India Focus Fund and the Government of Singapore held 3.15 percent and 3.75 percent stakes, respectively, in Sapphire Foods India.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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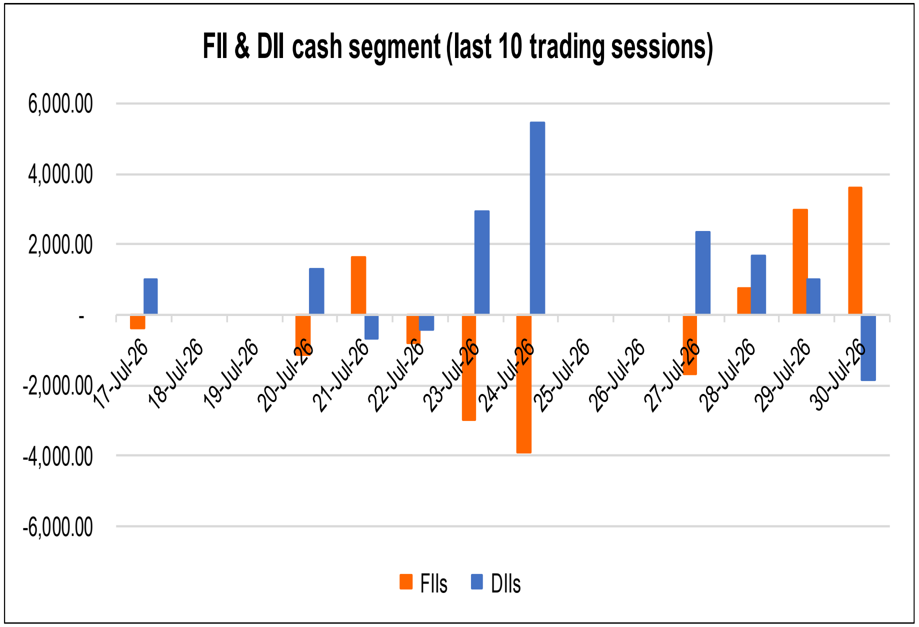
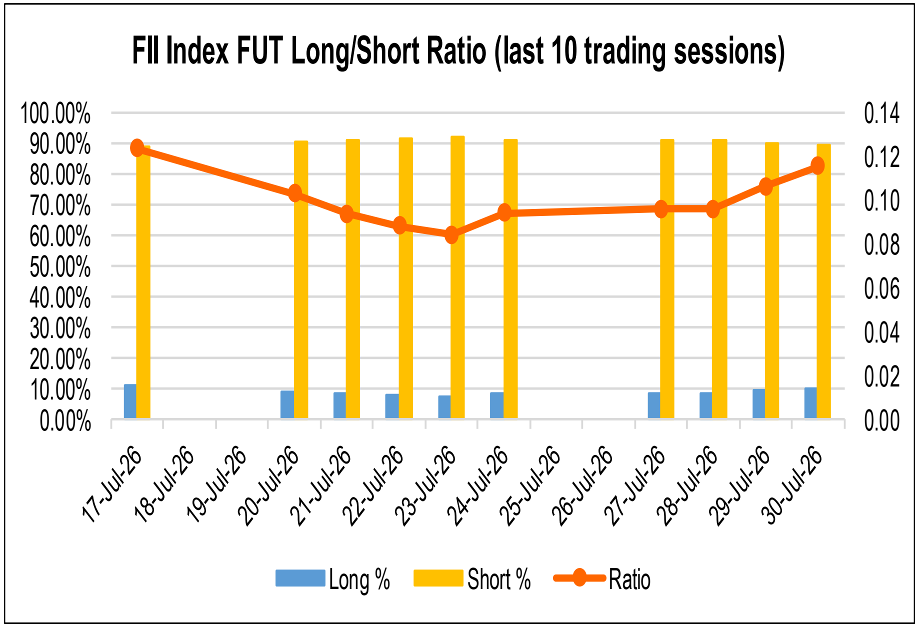
*INR in Crores

Cash Segment	30-Jul-2026	MTD	YTD
FII Net Flows	3,623.51	-6,056.47	-3,51,800.30
DII Net Flows	-1,864.03	32,838.88	5,02,976.04

*INR in Crores

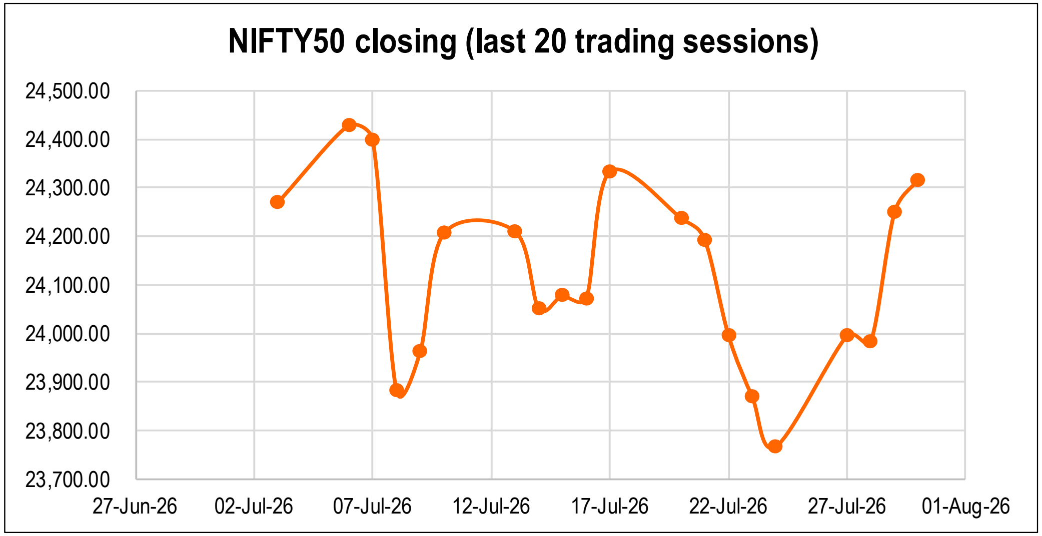
FIIs F&O Flows	30-Jul-2026	MTD
Index Futures	1,299.57	-1,482.29
Index Options	-8,407.87	-2,16,895.80
Stock Futures	-236.61	14,368.92
Stock Options	-177.05	-3,003.17



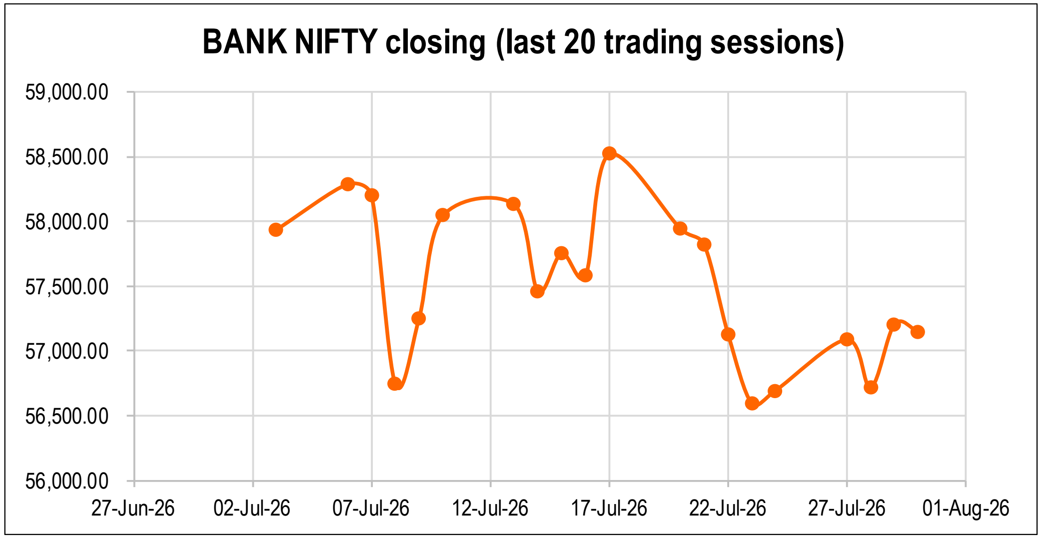


INDEX VIEW

NIFTY	
Spot	24317.15
Futures	24358.00
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	57147.50
Futures	57294.60
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.88
Key Supply Zones	57500, 58200
Key Demand Zones	56800, 56000



STOCKS & SECTOR UPDATES

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Auto	28,279.10	1.63%	3.90%	4.32%	0.32%
Nifty Oil & Gas	11,127.75	0.46%	0.46%	-0.04%	-9.02%
Nifty Energy	38,313.55	0.35%	-1.31%	-3.51%	8.46%
Nifty Consumer Durables	40,251.10	0.33%	3.34%	8.88%	9.51%
Nifty Infrastructure	9,345.05	0.31%	1.13%	-1.17%	-2.82%
Nifty Media	1,585.45	0.29%	3.80%	4.36%	9.74%
Nifty IT	31,194.55	0.23%	8.44%	15.69%	-17.66%
Nifty PSU Bank	8,327.65	0.13%	-0.22%	-2.48%	-2.41%
Nifty Metal	12,701.80	0.12%	2.42%	1.58%	13.74%
Nifty Healthcare	16,699.65	0.02%	2.85%	3.40%	14.07%
Nifty FMCG	49,642.05	-0.10%	1.20%	-0.88%	-10.52%
Nifty Pharma	26,346.05	-0.10%	3.12%	4.10%	15.94%
Nifty Bank	57,147.50	-0.10%	0.80%	-1.52%	-4.09%
Nifty Financial Services	26,251.25	-0.14%	1.32%	-2.28%	-4.93%
Nifty Private Bank	27,515.00	-0.18%	0.87%	-2.48%	-4.20%
Nifty Realty	899.50	-2.06%	2.01%	3.19%	2.45%

Sector View

Nifty IT Index formed a Gravestone Doji near the 31,300 resistance zone on Thursday, following a Long-Legged Doji in the previous session. The back-to-back candlestick formations highlight indecision and waning buying momentum at higher levels. While the broader recovery remains intact, the current setup suggests temporary exhaustion among buyers, increasing the probability of a short-term pullback or consolidation in the coming sessions unless the index manages a decisive breakout.

Stocks to watch

HAVELLS, HINDALCO, INDHOTEL, NYKAA.

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
RELIANCE	1292.90	1.33	1294.42	1306.35	1409.79
BHARTIARTL	1956.80	0.34	1923.47	1878.67	1951.89
HDFCBANK	753.95	0.77	787.15	777.04	876.41
ICICIBANK	1433.90	-0.28	1424.56	1354.32	1348.71
SBIN	1025.30	1.14	1028.93	1011.82	1022.49
TCS	2431.80	-0.60	2210.71	2199.53	2698.07
BAJFINANCE	1053.50	-0.09	1036.64	974.75	971.92
LT	3937.70	0.16	3876.13	3983.03	3964.18
HINDUNILVR	2107.90	-0.47	2140.26	2153.02	2280.71
SUNPHARMA	2001.10	0.56	1943.97	1874.93	1771.37
INFY	1155.10	-0.04	1079.83	1110.26	1358.04
MARUTI	14188.00	1.72	13820.75	13542.38	14616.71
TITAN	4850.00	0.00	4650.14	4392.90	4139.71
ADANIENT	3049.10	0.81	3115.27	3020.59	2432.12
M&M	3283.70	1.92	3171.72	3111.40	3364.72
ADANIPORTS	1664.10	-3.23	1805.16	1808.79	1573.02
KOTAKBANK	389.40	-0.21	383.01	388.59	404.05
AXISBANK	1228.90	-0.53	1282.85	1304.47	1284.49
HCLTECH	1352.70	0.62	1218.70	1172.45	1415.57
ITC	285.05	-0.42	282.72	286.82	333.93
ULTRACEMCO	11847.00	-1.26	11766.20	11489.16	11813.28
NTPC	344.85	0.39	347.87	359.30	357.03
BAJAJ_AUTO	11432.00	0.83	10585.82	10340.50	9621.90
JSWSTEEL	1270.80	-0.45	1244.93	1262.49	1207.37
BAJAJFINSV	1909.40	-0.78	1885.81	1806.99	1916.06

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ETERNAL	310.65	-0.37	290.71	268.40	275.25
ONGC	241.59	1.38	245.50	252.82	259.13
NESTLEIND	1520.70	1.16	1457.43	1426.94	1321.95
BEL	384.90	-0.68	407.18	411.34	420.39
ASIANPAINT	2746.20	-0.44	2695.13	2686.55	2584.16
POWERGRID	285.70	1.01	285.22	287.56	286.11
COALINDIA	417.20	1.74	427.00	443.56	425.65
SHRIRAMFIN	1027.20	-1.68	1038.78	995.08	943.48
TATASTEEL	186.92	-0.19	186.90	195.42	191.07
HINDALCO	970.40	0.83	958.41	1011.48	932.51
EICHERMOT	7912.50	1.72	7549.30	7395.86	7237.15
GRASIM	3104.80	-0.26	3139.51	3128.37	2876.63
INDIGO	5230.50	-0.87	5229.25	4950.06	4955.97
SBILIFE	1877.50	-0.92	1839.79	1812.66	1922.17
WIPRO	186.33	1.48	176.78	183.62	217.44
JIOFIN	246.95	-1.01	238.58	238.15	263.91
TECHM	1669.00	1.51	1524.83	1481.87	1493.84
TRENT	2999.20	-0.20	2951.46	2954.33	2800.82
APOLLOHOSP	8988.00	0.59	8874.83	8594.45	7748.24
TMPV	334.20	1.33	333.65	357.84	359.97
HDFCLIFE	545.40	-2.03	560.33	574.88	670.04
CIPLA	1466.40	-0.54	1436.66	1416.30	1408.00
TATACONSUM	1094.20	-0.17	1098.53	1119.76	1141.25
MAXHEALTH	1124.80	1.21	1104.62	1065.27	1059.68
DRREDDY	1144.80	0.22	1230.43	1272.66	1261.72

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