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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,178.41	693.38	1.32%
S&P 500	7,600.50	110.78	1.48%
NASDAQ 100	28,776.80	502.61	1.78%
FTSE 100	10,857.70	-10.35	-0.10%
NIKKIE (8:00 AM)	63,435.00	-319.90	-0.50%
HANG SENG (8:00 AM)	25,862.00	-147.40	-0.57%
GOLD	4,111.50	21.00	0.51%
SILVER	58.83	0.98	1.69%
BRENT OIL	84.63	0.86	1.03%
DOLLAR INDEX	99.89	0.10	0.10%
USD/INR	95.39	0.06	0.06%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. markets** began August on a strong note, with the Dow Jones Industrial Average closing at a record high as easing U.S.-Iran tensions pulled down both crude oil prices and U.S. Treasury yields, boosting investor sentiment amid a busy week of corporate earnings and economic data.

- **Asian markets** remained cautious as the U.S.-Iran conflict remained unresolved, while crude oil prices hovered near their lowest levels in recent weeks.

- **Crude oil** prices rebounded slightly on Tuesday after Monday's sharp decline, as concerns over potential disruptions to Middle East energy supplies persisted despite the absence of a diplomatic breakthrough between the U.S. and Iran.

- **GIFT Nifty** trading at ~24,659.00 is indicating a muted start for the Indian market on Tuesday.

MARKET SNAPSHOT

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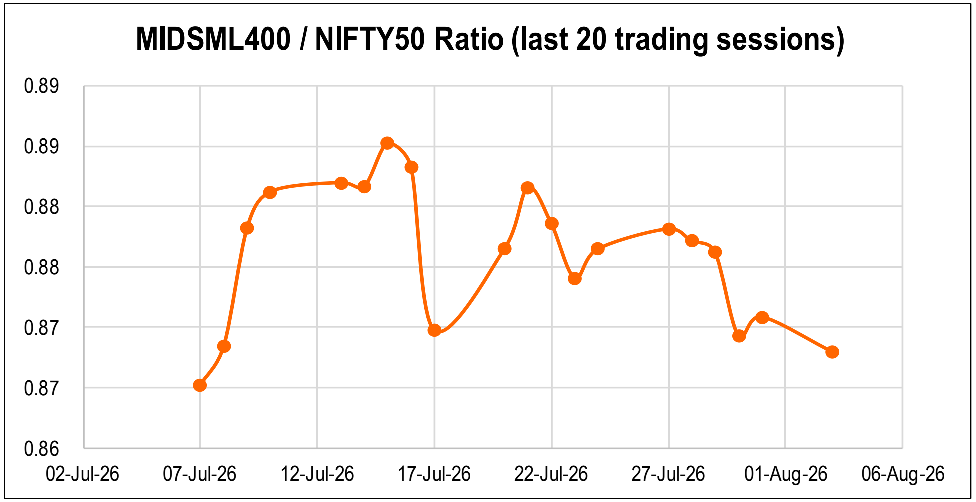
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,774.30	390.70	1.60%
SENSEX	78,639.03	544.39	0.70%
BANK NIFTY	58,247.95	983.10	1.72%
FIN NIFTY	26,984.45	390.40	1.47%
MIDCAP NIFTY	14,898.15	113.75	0.77%
NIFTY SMLCAP 250	18,128.30	208.40	1.16%
INDIA VIX	11.83	0.08	0.64%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	44	6	0
NIFTY 500	382	118	0
NIFTY F&O	162	46	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	36	72%
NIFTY 500	325	65%

Highlights

- Nifty remained range-bound for most of the day before a sharp 200-point spike in the closing minutes, driven by the implementation of the new closing price adjustment reforms.
- IT stocks bounced back after a brief pullback, indicating renewed buying interest in the sector.
- Buying interest returned to most private banking stocks, although HDFC Bank continued to remain under pressure.



INDIA KEY NEWS

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Life Insurance Corporation of India

The Government of India has announced the sale of up to a 6.5 percent stake in Life Insurance Corporation of India (LIC) through an offer for sale (OFS) on August 4-5. The base offer size is 2.5 percent of the paid-up equity share capital (31.62 crore equity shares), with an additional 4 percent stake (50.59 crore shares) available under the green shoe option. The floor price has been fixed at Rs 382 per share.

Arvind

The company launched its qualified institutions placement (QIP) issue for fundraising on August 3, with the floor price fixed at Rs 518.58 per share.

UPL

Mike Frank, Chief Executive Officer of UPL Corporation and a member of the senior management personnel of the UPL Group, has resigned as he has decided to relocate to the United States due to personal commitments. Accordingly, his association with the UPL Group will conclude with effect from August 31, 2026, after completing a successful tenure of four and a half years.

*Source: moneycontrol.com

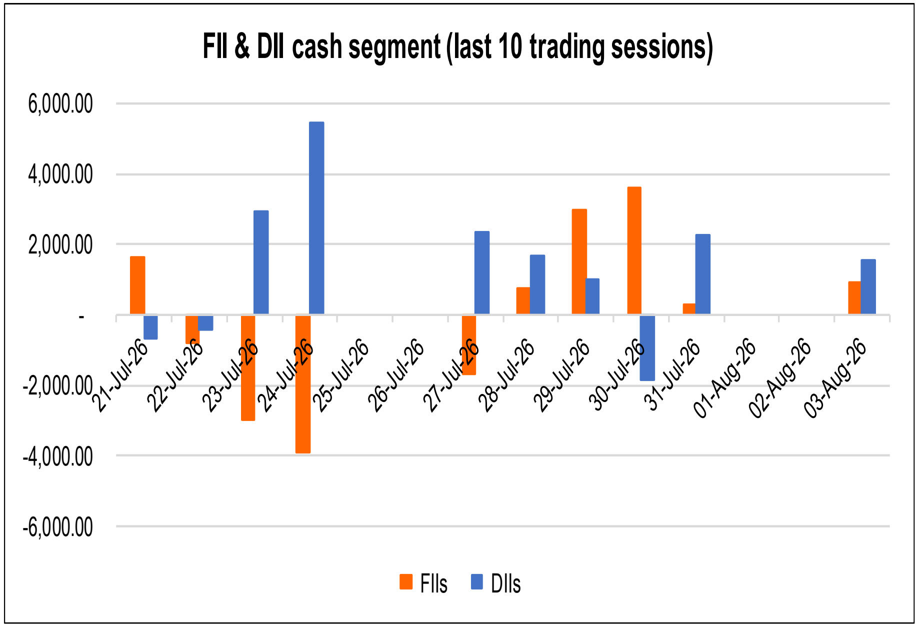
INSTITUTIONAL ACTIVITY

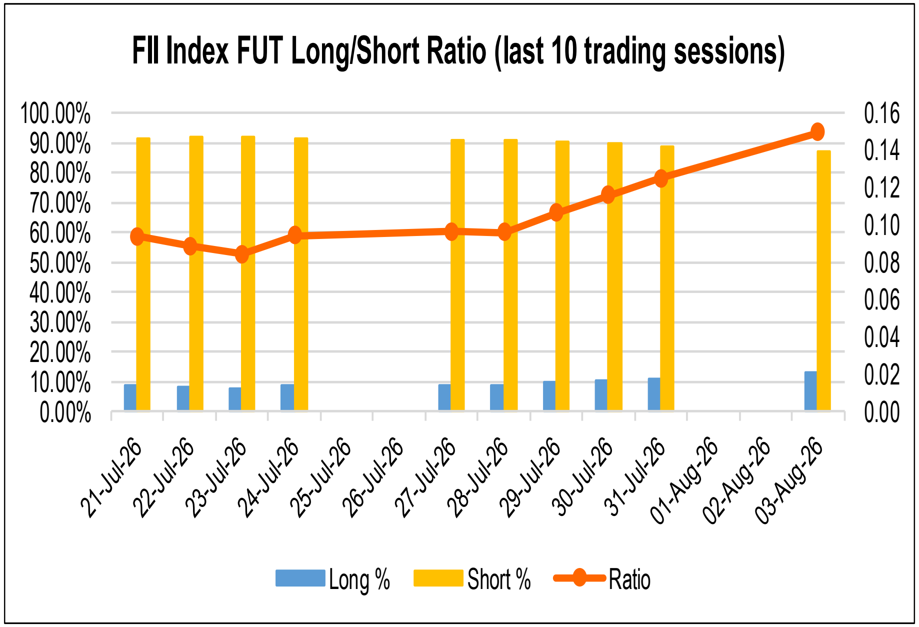
*INR in Crores

Cash Segment	3-Aug-2026	MTD	YTD
FII Net Flows	922.26	922.26	-3,50,600.56
DII Net Flows	1,571.18	1,571.18	5,06,807.59

*INR in Crores

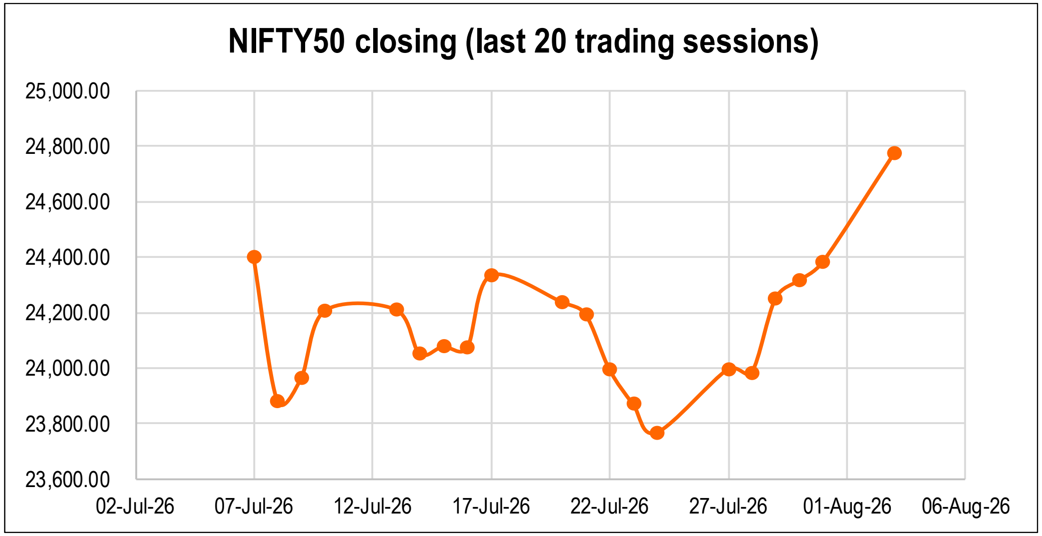
FIIs F&O Flows	3-Aug-2026	MTD
Index Futures	3,617.70	3,617.70
Index Options	5,813.93	5,813.93
Stock Futures	-306.93	-306.93
Stock Options	-184.42	-184.42



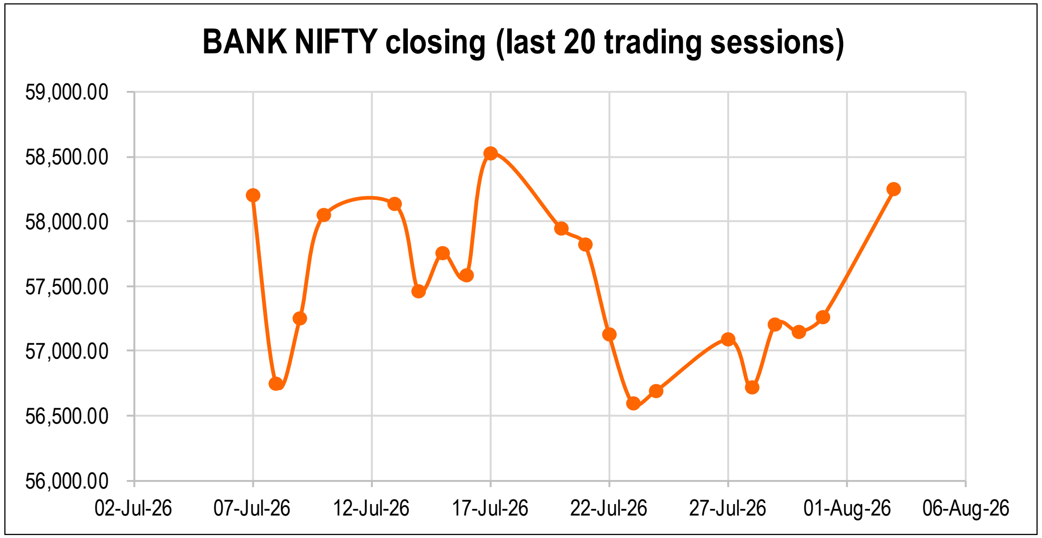


INDEX VIEW

NIFTY	
Spot	24774.30
Futures	24649.40
Highest CE OI (25th AUG)	24000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.11
Key Supply Zones	25000, 25150
Key Demand Zones	24400, 24200



BANK NIFTY	
Spot	58247.95
Futures	57861.60
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.88
Key Supply Zones	58600, 59000
Key Demand Zones	58000, 57600



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty IT	31,715.25	3.28%	4.26%	15.58%	-16.28%
Nifty Private Bank	28,045.15	1.90%	2.79%	-0.60%	-2.35%
Nifty Bank	58,247.95	1.72%	2.63%	0.53%	-2.24%
Nifty FMCG	49,962.65	1.71%	2.21%	-0.27%	-9.94%
Nifty Metal	12,907.25	1.48%	4.09%	2.45%	15.58%
Nifty Financial Services	26,984.45	1.47%	3.69%	0.41%	-2.28%
Nifty Auto	29,166.20	1.47%	4.75%	8.07%	3.46%
Nifty PSU Bank	8,485.65	1.42%	2.43%	0.93%	-0.56%
Nifty Consumer Durables	40,611.65	1.35%	2.68%	10.26%	10.49%
Nifty Realty	912.65	1.24%	-0.96%	2.45%	3.95%
Nifty Infrastructure	9,507.80	1.05%	2.74%	0.36%	-1.13%
Nifty Oil & Gas	11,355.75	0.96%	2.60%	1.97%	-7.16%
Nifty Energy	38,925.20	0.51%	1.97%	-0.65%	10.19%
Nifty Pharma	26,653.40	0.45%	2.52%	3.53%	17.29%
Nifty Healthcare	16,783.55	0.17%	1.73%	2.08%	14.64%
Nifty Media	1,562.35	-3.48%	0.24%	3.31%	8.14%

Sector View

Nifty Consumer Durables Index closed at the day's high on Monday, reinforcing the prevailing bullish momentum. Following the decisive breakout above the 38,500 resistance zone, the index has been comfortably sustaining above its 20-day SMA, reflecting strong buying interest. Adding to the positive outlook, the recent Golden Crossover signals a shift in the broader trend from bearish to bullish. The current technical structure suggests the index is well-positioned to extend its rally towards the 43,500 level over the coming weeks.

Stocks to watch

ABB, INDIGO, JUBLFOOD, NATIONALUM.

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	1319.00	0.86	1294.50	1304.70	1409.20
BHARTIARTL	1970.50	-0.08	1928.79	1881.71	1952.17
HDFCBANK	753.00	0.65	780.67	776.69	874.14
ICICIBANK	1460.00	1.71	1427.42	1362.62	1349.46
SBIN	1045.00	1.71	1028.67	1015.24	1024.25
TCS	2473.70	4.57	2245.12	2203.22	2691.82
BAJFINANCE	1153.00	1.03	1048.32	984.02	973.16
LT	4025.00	2.19	3870.94	3985.52	3966.51
HINDUNILVR	2138.00	1.75	2132.06	2150.04	2277.21
SUNPHARMA	1963.50	-1.36	1950.79	1878.58	1774.69
INFY	1180.00	4.42	1090.87	1108.96	1354.56
MARUTI	14150.00	-0.59	13798.85	13589.80	14598.65
TITAN	5000.00	2.56	4696.62	4426.61	4153.51
M&M	3428.60	0.89	3196.17	3123.52	3364.51
ADANIENT	3068.00	1.94	3098.21	3034.10	2437.94
ADANIPORTS	1701.00	0.27	1788.10	1805.42	1576.05
KOTAKBANK	397.50	1.84	383.50	389.06	403.73
AXISBANK	1272.00	3.46	1273.84	1304.44	1285.26
HCLTECH	1377.00	2.23	1241.24	1180.17	1414.50
ITC	287.00	2.14	282.21	285.87	332.77
ULTRACEMCO	12054.00	1.27	11794.85	11510.64	11812.15
NTPC	350.90	1.05	347.14	357.64	357.17
BAJAJFINSV	2096.00	3.30	1903.75	1819.01	1916.54
BAJAJ_AUTO	11856.00	2.91	10763.55	10385.44	9650.77
JSWSTEEL	1292.30	1.76	1249.38	1262.44	1208.58

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ONGC	242.00	-0.22	245.64	250.63	259.13
ETERNAL	310.50	2.66	293.10	270.96	274.88
NESTLEIND	1530.00	1.35	1462.73	1431.20	1325.31
BEL	392.15	1.11	404.00	410.27	420.23
POWERGRID	287.00	0.97	285.12	286.99	286.11
ASIANPAINT	2810.00	2.28	2698.36	2693.75	2588.62
COALINDIA	416.00	0.45	424.96	441.79	425.98
SHRIRAMFIN	1090.20	4.16	1039.33	1001.06	947.49
TATASTEEL	191.00	0.69	186.90	194.73	191.23
HINDALCO	994.90	2.10	960.20	1007.17	934.65
EICHERMOT	8050.00	2.76	7602.92	7438.70	7247.57
GRASIM	3260.00	5.13	3137.85	3133.07	2880.49
INDIGO	5400.00	4.43	5216.05	4988.13	4952.02
SBILIFE	1915.00	1.75	1850.82	1814.12	1923.25
WIPRO	188.66	2.73	177.88	183.13	216.85
JIOFIN	263.00	2.55	240.59	239.13	263.44
TECHM	1649.00	-0.14	1549.02	1490.69	1495.71
TRENT	3050.00	1.47	2920.03	2965.18	2800.18
APOLLOHOSP	8820.00	-1.53	8874.58	8622.25	7760.34
TMPV	349.30	2.81	333.55	357.17	359.30
HDFCLIFE	553.10	0.84	558.82	572.52	668.04
CIPLA	1474.40	0.08	1437.52	1419.22	1407.70
TATACONSUM	1110.00	2.48	1096.46	1115.55	1141.02
MAXHEALTH	1100.40	0.17	1100.27	1065.91	1059.18
DRREDDY	1180.00	2.78	1209.73	1266.41	1260.96

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