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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,885.10	-464.02	-0.85%
S&P 500	7,709.96	-13.59	-0.18%
NASDAQ 100	29,373.33	-114.46	-0.39%
FTSE 100	10,867.89	-20.41	-0.19%
NIKKIE (8:00 AM)	64,996.00	-687.26	-1.05%
HANG SENG (8:00 AM)	25,464.00	-66.28	-0.26%
GOLD	4,315.25	15.65	0.36%
SILVER	62.38	0.78	1.26%
BRENT OIL	83.56	1.07	1.30%
DOLLAR INDEX	99.84	0.03	0.03%
USD/INR	95.45	0.30	0.31%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** ended lower on Thursday as investors booked profits following recent record highs. Rising crude oil prices, higher U.S. Treasury yields and mixed corporate earnings weighed on sentiment ahead of the closely watched U.S. July non-farm payrolls report. **Asian markets** traded mostly lower on Friday, tracking the weak close on Wall Street as investors remained cautious ahead of the U.S. jobs data.

- **Crude oil** prices extended their gains after fresh concerns emerged over the Strait of Hormuz, with Iran, in coordination with Oman, proposing restrictions on vessels deemed hostile and heavy penalties for violations, raising fears of renewed supply disruptions.

- **GIFT Nifty** trading at ~24,646.00 is indicating a negative start for the Indian market on Friday.

MARKET SNAPSHOT

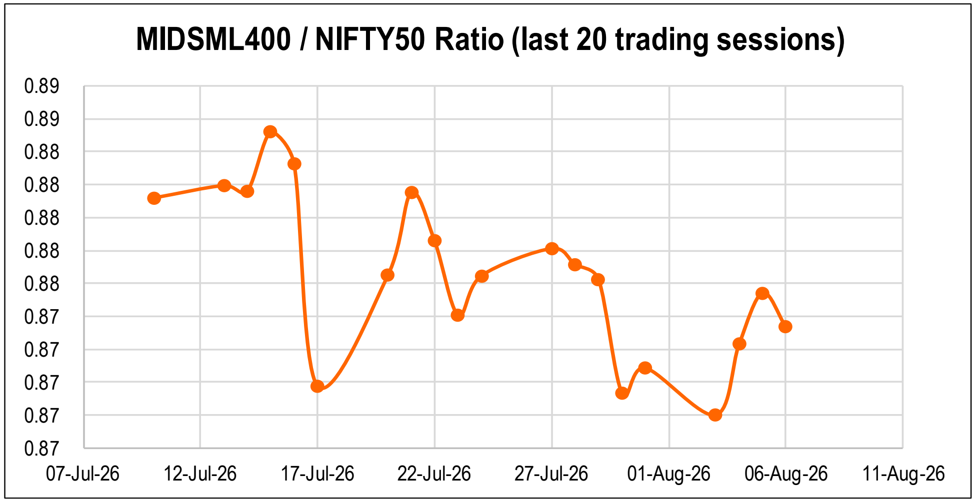
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,636.00	11.35	0.05%
SENSEX	78,954.76	373.76	0.48%
BANK NIFTY	58,063.65	323.70	0.56%
FIN NIFTY	26,863.50	19.60	0.07%
MIDCAP NIFTY	14,812.60	-67.70	-0.45%
NIFTY SMLCAP 250	18,358.65	36.70	0.20%
INDIA VIX	12.12	0.06	0.52%

Highlights

- Nifty remained range-bound after a gap-up opening, facing stiff resistance near the previous day's high of 24,677.
- Weak market breadth, with 34 Nifty stocks closing lower, indicates that buying remained concentrated in a handful of heavyweight counters.
- Reliance Industries and State Bank of India played a key role in supporting the benchmark despite broad-based weakness.

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	15	34	1
NIFTY 500	202	293	5
NIFTY F&O	65	138	5

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	35	70%
NIFTY 500	319	64%



Alkem Laboratories

The US Food and Drug Administration (FDA) has issued a Form 483 with seven observations following the conclusion of an inspection at the company's Daman facility. The US health regulator has now classified the inspection status of the facility as Official Action Indicated (OAI). The US FDA conducted the inspection at the company's manufacturing facility from April 20 to May 1, 2026.

Dabur India

The company has received a warning letter from the US FDA for its Silvassa manufacturing plant in connection with the import alert issued in June, seeking additional details regarding its corrective and preventive action (CAPA) plan. The issue relates only to a small part of the Silvassa manufacturing plant involved in the export of private-label products and does not generate significant revenue for the company. The company's domestic products are not covered by the import alert and remain unaffected. The Silvassa plant also continues to operate for the domestic market.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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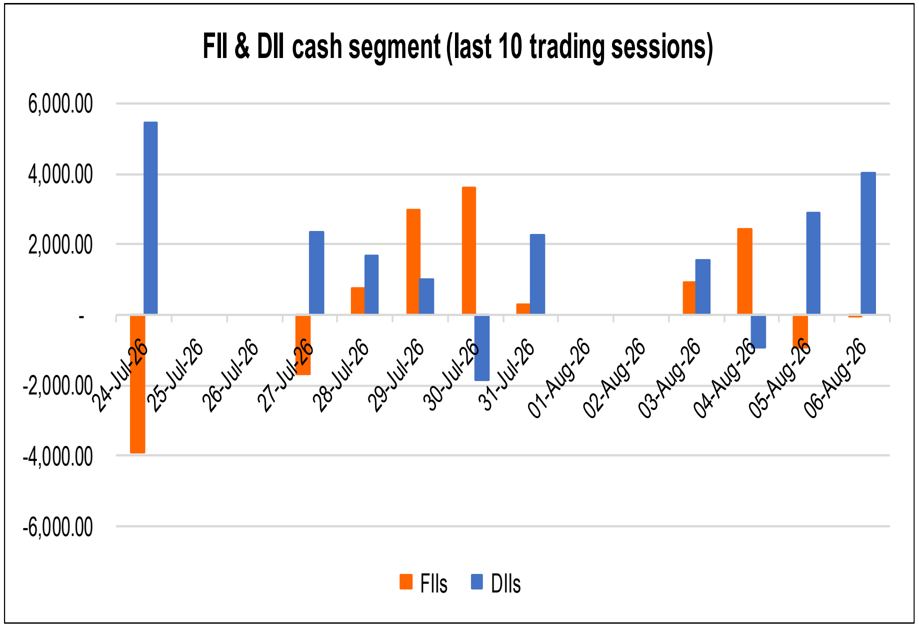
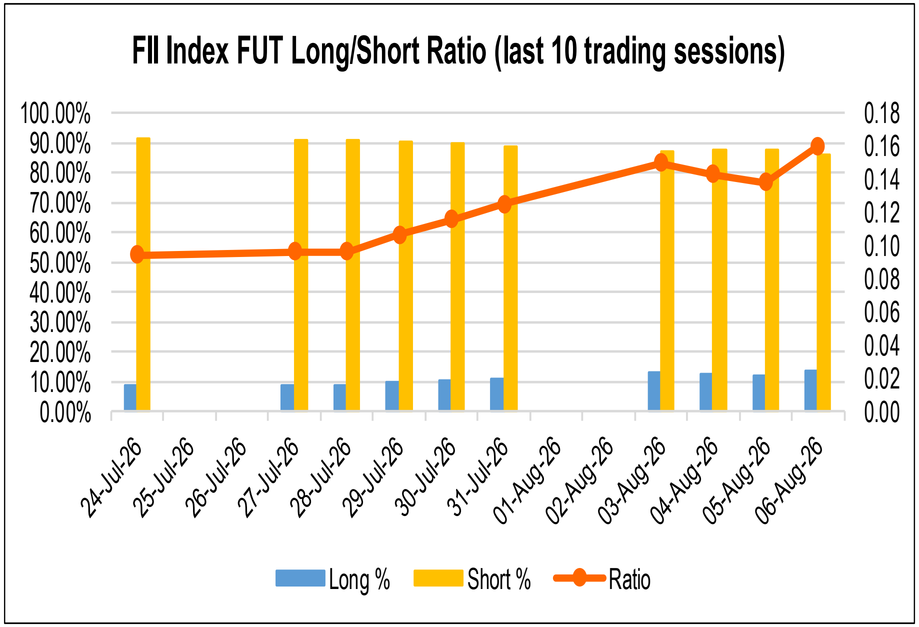
*INR in Crores

Cash Segment	6-Aug-2026	MTD	YTD
FII Net Flows	-17.86	2,407.45	-3,49,115.37
DII Net Flows	4,013.60	7,531.81	5,12,768.22

*INR in Crores

FIIs F&O Flows	6-Aug-2026	MTD
Index Futures	2,253.84	4,548.42
Index Options	-1,231.85	9,244.37
Stock Futures	242.33	-1,185.90
Stock Options	-173.58	-69.12





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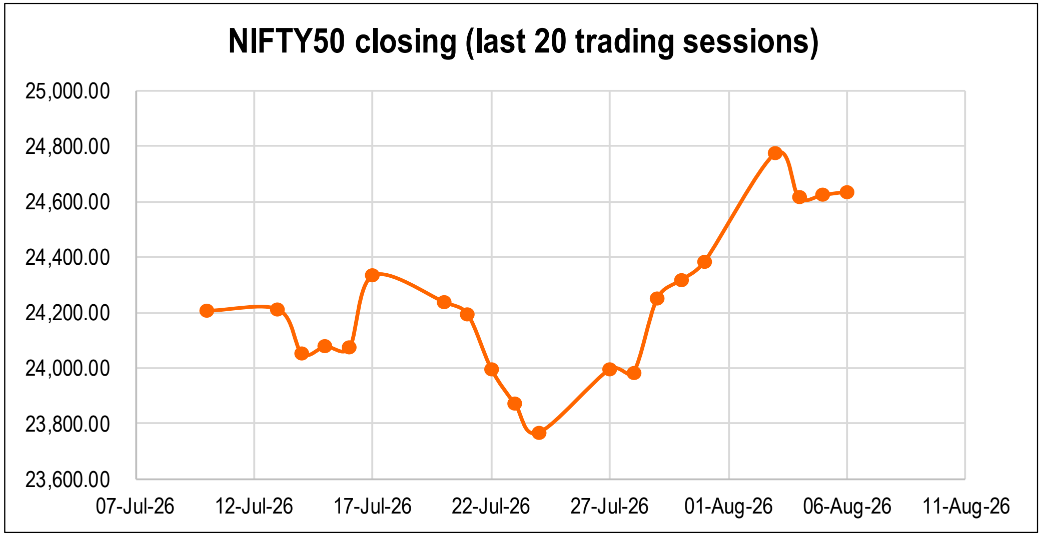
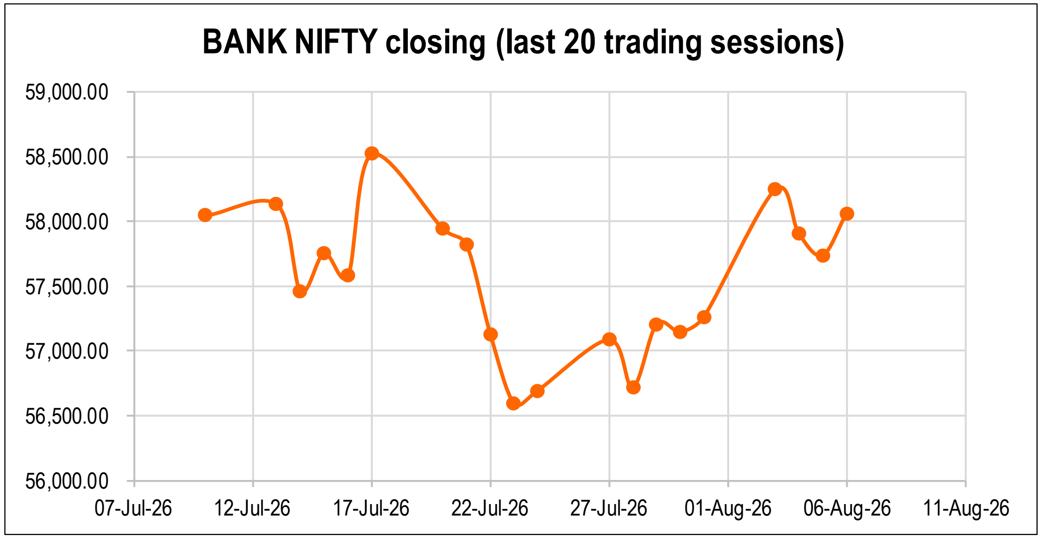
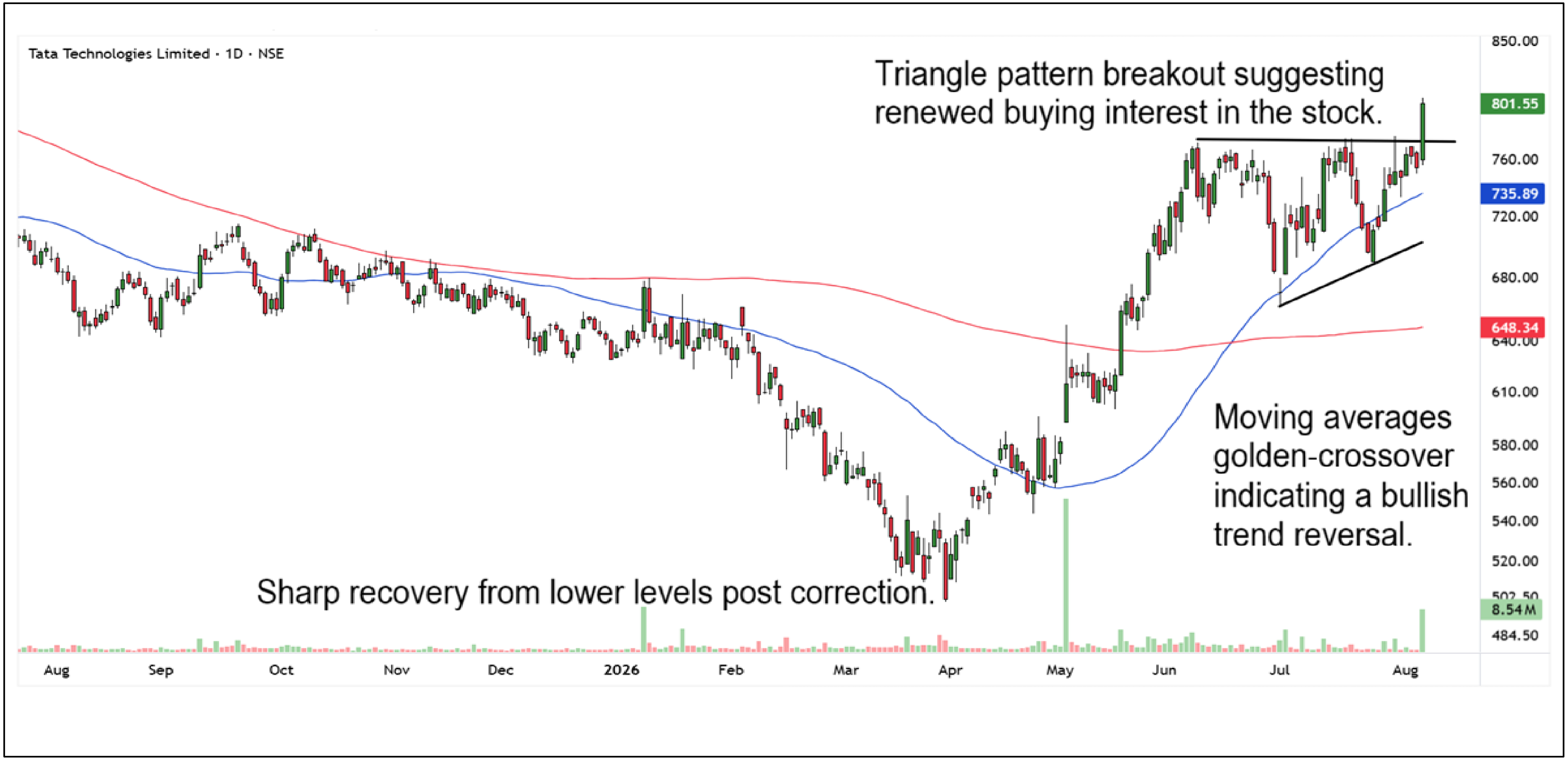
NIFTY	
Spot	24636.00
Futures	24739.40
Highest CE OI (25th AUG)	24000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	1.17
Key Supply Zones	25000, 25150
Key Demand Zones	24400, 24200



BANK NIFTY	
Spot	58063.65
Futures	58179.60
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.96
Key Supply Zones	58600, 59000
Key Demand Zones	57400, 56800





Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
TATATECH	Bullish	801.55	746	853 | 886	Up to 2 months

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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty PSU Bank	8,729.25	2.20%	4.33%	8.14%	2.30%
Nifty Oil & Gas	11,304.30	0.79%	0.50%	2.78%	-7.58%
Nifty Bank	58,063.65	0.56%	1.39%	2.33%	-2.55%
Nifty Consumer Durables	40,381.40	0.31%	0.77%	8.52%	9.86%
Nifty Financial Services	26,863.50	0.07%	1.01%	2.05%	-2.72%
Nifty Infrastructure	9,453.30	0.01%	0.47%	2.20%	-1.70%
Nifty Pharma	26,564.80	0.00%	0.11%	4.46%	16.90%
Nifty FMCG	49,369.85	-0.03%	0.51%	0.80%	-11.01%
Nifty Healthcare	16,696.70	-0.08%	-0.35%	3.41%	14.05%
Nifty Private Bank	27,679.90	-0.23%	0.57%	0.32%	-3.63%
Nifty Energy	38,683.25	-0.38%	-0.12%	-0.03%	9.50%
Nifty IT	31,106.20	-0.95%	1.29%	12.89%	-17.89%
Nifty Metal	13,124.60	-0.99%	3.19%	5.26%	17.52%
Nifty Auto	29,113.40	-1.01%	1.28%	8.90%	3.28%
Nifty Media	1,555.00	-1.28%	-3.93%	7.06%	7.63%
Nifty Realty	886.85	-1.32%	-1.62%	1.24%	1.01%

Sector View

Nifty India Defence Index broke above the 21-day high after a brief consolidation around its 50-day SMA, signalling a resurgence in buying momentum. The broader trend remains bullish, and the recent breakout suggests a high probability of the index surpassing its lifetime high of 9,784 in the coming sessions.

Nifty PSU Bank Index has been consolidating around its 200-day SMA for nearly four months, reflecting indecision between buyers and sellers. However, Thursday's 2.20% rally, coupled with a close near the day's high, points to renewed buying interest and improving sentiment. A sustained move above the long-term moving average could pave the way for a stronger bullish reversal.

Stocks to watch

AUBANK, HAL, SBIN, UNIONBANK.

Stocks in F&O ban list

BANDHANBNK, LICI.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3026.00	-0.79	3092.62	3045.89	2446.74
ADANIPORTS	1695.00	-0.29	1771.90	1799.44	1580.18
APOLLOHOSP	8974.50	0.72	8899.50	8660.44	7779.46
ASIANPAINT	2755.00	-0.18	2709.31	2700.65	2595.06
AXISBANK	1256.00	0.17	1265.02	1301.96	1286.38
BAJAJ_AUTO	11620.00	-1.53	10993.12	10453.17	9690.30
BAJAJFINSV	2086.00	0.00	1935.84	1837.06	1917.71
BAJFINANCE	1144.80	-1.21	1068.12	997.30	975.02
BEL	399.20	2.36	401.39	408.71	420.00
BHARTIARTL	1948.00	-1.52	1936.35	1887.77	1952.45
CIPLA	1477.00	1.25	1441.06	1422.53	1406.29
COALINDIA	415.60	0.02	423.00	439.31	426.48
DRREDDY	1171.00	-0.43	1187.06	1257.47	1259.74
EICHERMOT	7967.50	-0.24	7681.60	7481.05	7263.20
ETERNAL	316.25	1.90	296.62	274.94	274.35
GRASIM	3220.00	-0.12	3141.07	3134.87	2886.47
HCLTECH	1335.00	-1.11	1270.77	1191.43	1412.34
HDFCBANK	734.30	-0.10	768.37	774.26	870.52
HDFCLIFE	542.50	-0.46	555.99	567.88	664.97
HINDALCO	1027.00	-1.25	969.32	1002.66	938.56
HINDUNILVR	2079.50	-0.28	2120.67	2143.08	2271.48
ICICIBANK	1457.50	0.51	1436.73	1373.16	1350.55
INDIGO	5318.50	-1.51	5232.45	5041.24	4946.00
INFY	1165.00	-0.77	1106.60	1108.88	1349.61
ITC	285.90	-0.37	282.73	284.96	331.08

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	263.10	0.44	244.77	240.52	262.78
JSWSTEEL	1307.90	-1.66	1261.69	1263.83	1210.88
KOTAKBANK	394.00	-1.50	386.65	389.59	403.23
LT	4061.80	0.12	3887.88	3987.74	3970.56
M&M	3406.00	-1.43	3241.67	3142.85	3364.11
MARUTI	14080.00	-0.78	13809.90	13651.26	14566.59
MAXHEALTH	1072.40	-0.70	1096.51	1070.14	1058.02
NESTLEIND	1535.00	0.99	1472.21	1437.39	1330.37
NTPC	345.00	-1.40	346.74	355.04	357.28
ONGC	237.80	-1.00	244.90	247.78	259.05
POWERGRID	270.75	-3.90	284.64	286.07	285.97
RELIANCE	1325.00	3.52	1296.09	1301.06	1408.01
SBILIFE	1861.50	-0.98	1860.70	1813.81	1924.24
SBIN	1085.00	2.84	1033.95	1021.14	1026.96
SHRIRAMFIN	1141.00	1.66	1051.22	1010.97	954.18
SUNPHARMA	1951.00	0.57	1957.03	1885.16	1779.00
TATACONSUM	1090.00	-0.57	1094.30	1109.79	1140.60
TATASTEEL	189.30	-1.91	187.26	193.59	191.51
TCS	2373.00	-1.66	2297.27	2210.11	2683.08
TECHM	1632.20	-1.08	1580.42	1502.98	1498.49
TITAN	4998.00	1.74	4751.57	4476.62	4174.72
TMPV	345.35	-1.27	335.44	355.60	358.50
TRENT	3107.10	-0.70	2949.43	2980.90	2800.26
ULTRACEMCO	12075.00	-0.94	11884.30	11538.58	11811.11
WIPRO	186.12	-0.47	179.92	182.05	215.93

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