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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,925.15	-130.76	-0.25%
S&P 500	7,503.85	-33.58	-0.45%
NASDAQ 100	29,173.02	-524.86	-1.77%
FTSE 100	10,665.88	14.11	0.13%
NIKKEI (8:00 AM)	67,695.00	-561.96	-0.82%
HANG SENG (8:00 AM)	23,901.50	404.61	1.72%
GOLD	4,128.30	-29.10	-0.70%
SILVER	60.39	-0.94	-1.53%
BRENT OIL	76.11	1.95	2.63%
DOLLAR INDEX	100.90	0.12	0.12%
USD/INR	95.23	0.27	0.29%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **Nasdaq Composite** declined sharply on Tuesday, dragged lower by Micron Technology and other semiconductor stocks amid growing concerns over the sustainability of Wall Street's AI-driven rally. **Asian markets** traded on a mixed note as investors assessed the implications of renewed geopolitical tensions on global energy supplies and broader risk sentiment.
- **Brent Crude** gained nearly 2% to trade around \$76 per barrel after the U.S. launched fresh airstrikes in Iran and revoked a waiver that had allowed the country to export oil despite recent attacks on vessels in the Strait of Hormuz.
- **GIFT Nifty** trading at ~24,245.00 is indicating a negative bias for the Indian market on Wednesday.



MARKET SNAPSHOT

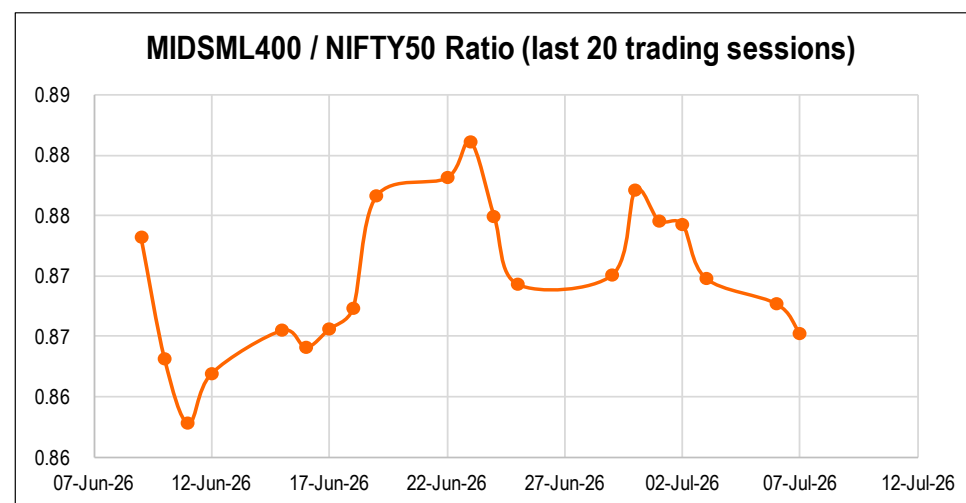
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,398.70	-31.65	-0.13%
SENSEX	78,180.72	-104.35	-0.13%
BANK NIFTY	58,200.70	-90.80	-0.16%
FIN NIFTY	26,985.05	-8.80	-0.03%
MIDCAP NIFTY	14,638.45	26.25	0.18%
NIFTY SMLCAP 250	17,953.10	-125.50	-0.69%
INDIA VIX	11.76	-0.06	-0.51%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	19	31	0
NIFTY 500	158	341	1
NIFTY F&O	75	135	0

INDEX	SCRIPS ABOVE 20 DSMA	%
NIFTY 50	35	70%
NIFTY 500	302	60%

Highlights

- Nifty faced strong resistance near the 25,600 zone, triggering profit booking and a sharp intraday reversal on the weekly expiry.
- IT stocks outperformed the broader market, with HCL Technologies, Tech Mahindra and Infosys providing key support to the benchmark.
- The mixed global cues suggest a cautious start for Indian equities on Wednesday while, rising crude oil prices could weigh on oil-sensitive sectors.





Axis Bank

The Reserve Bank of India has approved the reappointment of N S Vishwanathan as the Non-Executive (Part-time) Chairman of the company.

HCL Technologies

Action, the data and AI division of HCLSoftware, has integrated Jaspersoft's embedded analytics and reporting capabilities with its data management portfolio. The integration follows the completion of HCLSoftware's acquisition of Jaspersoft.

Adani Enterprises

The company announced the closure of its QIP issue on July 7, allocating 5.2 crore equity shares worth Rs 15,000 crore at Rs 2,883 per share.



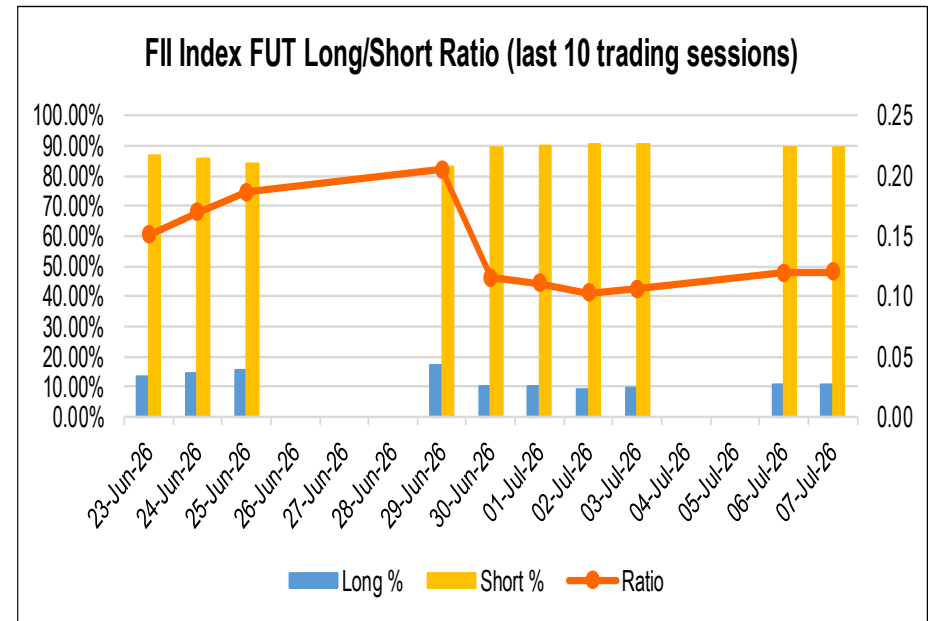
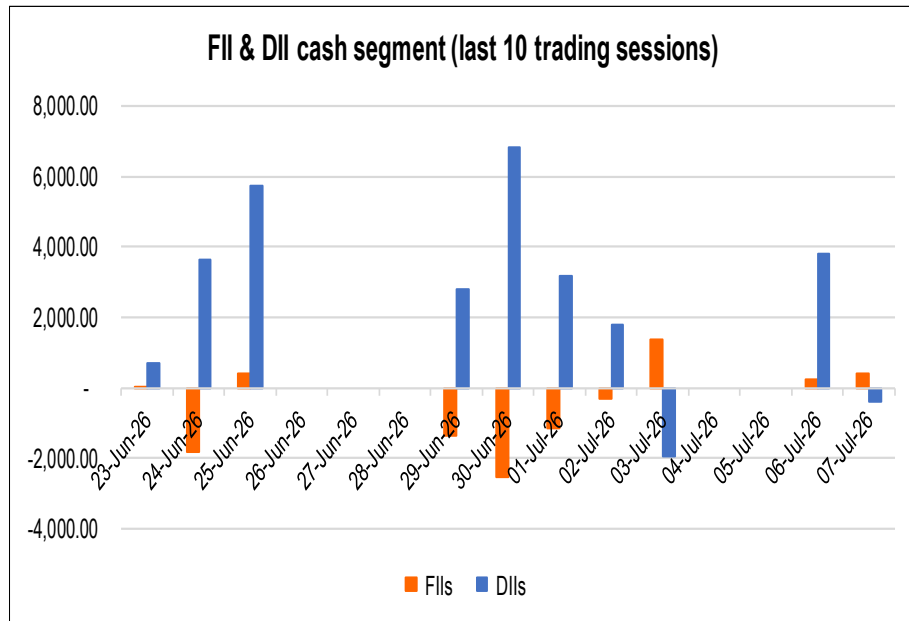
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	7-7-2026	MTD	YTD
FII Net Flows	393.19	539.23	-3,45,204.60
DII Net Flows	-383.43	6,397.74	4,76,534.90

*INR in Crores

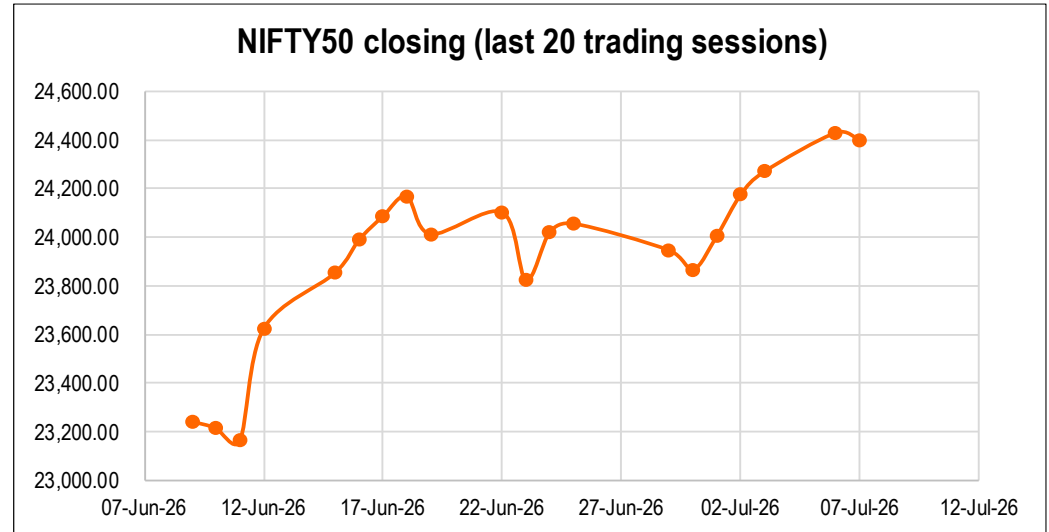
FII's F&O Flows	7-7-2026	MTD
Index Futures	390.89	2,750.06
Index Options	-40,176.15	-45,565.63
Stock Futures	1,133.23	4,020.80
Stock Options	154.04	-1,276.05





INDEX VIEW

NIFTY	
Spot	24398.70
Futures	24440.30
Highest CE OI (28 th JULY)	25000
Highest PE OI (28 th JULY)	24000
PCR (28 th JULY)	1.15
Key Supply Zones	24600, 25150
Key Demand Zones	24200, 24000



BANK NIFTY	
Spot	58200.70
Futures	58398.60
Highest CE OI (28 th JULY)	59000
Highest PE OI (28 th JULY)	59000
PCR (28 th JULY)	0.88
Key Supply Zones	58700, 60000
Key Demand Zones	58000, 57000

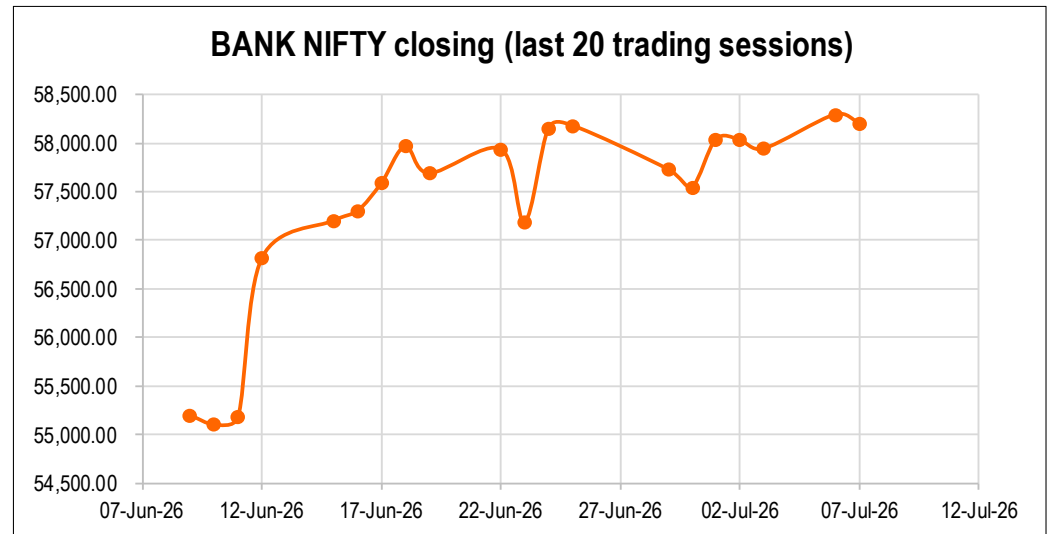




CHART OF THE DAY



Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
HAVELLS	Bullish	1225	1174	1290 1329	Up to 3 months



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty IT	27,939.15	2.43%	8.42%	-2.02%	-26.25%
Nifty Consumer Durables	37,709.30	0.89%	3.46%	7.82%	2.59%
Nifty FMCG	50,225.85	0.06%	0.84%	3.67%	-9.46%
Nifty Financial Services	26,985.05	-0.03%	0.70%	7.29%	-2.28%
Nifty Auto	27,343.50	-0.04%	2.09%	5.06%	-3.00%
Nifty Oil & Gas	11,248.90	-0.11%	1.49%	2.59%	-8.03%
Nifty Private Bank	28,305.35	-0.15%	0.45%	6.61%	-1.45%
Nifty Bank	58,200.70	-0.16%	0.29%	5.45%	-2.32%
Nifty PSU Bank	8,298.30	-0.43%	-3.24%	-2.33%	-2.75%
Nifty Infrastructure	9,454.00	-0.69%	0.13%	3.64%	-1.69%
Nifty Pharma	25,677.70	-0.73%	1.97%	5.71%	13.00%
Nifty Energy	39,188.45	-0.74%	-1.45%	-1.42%	10.93%
Nifty Media	1,486.80	-0.74%	-1.47%	0.83%	2.91%
Nifty Healthcare	16,343.90	-0.83%	1.76%	5.39%	11.64%
Nifty Metal	12,582.75	-1.10%	1.52%	-3.11%	12.67%
Nifty Realty	892.60	-1.58%	3.88%	17.23%	1.67%

Sector View

Nifty IT Index regained buying interest after rebounding from its 10-day SMA following a two-session pullback. The index is approaching the gap resistance near 28,270, a level that warrants close monitoring. A decisive breakout above 28,270 could reignite bullish momentum and pave the way for an extended move towards 29,000.

Nifty Realty Index formed a Bearish Engulfing pattern at higher levels after the recent rally, indicating exhaustion in buying momentum. The candlestick structure suggests a short-term pullback, with the index likely to retrace towards the 865 support zone in the coming sessions.

Stocks in Bullish Momentum: JUBLFOOD, PAYTM.

Stocks in Bearish Momentum: JINDALSTEEL, KEI.

Stocks in F&O ban list: Nil.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3107.20	-3.10	3030.34	2817.22	2376.09
ADANIPTS	1833.90	-1.64	1824.56	1782.00	1540.30
APOLLOHSP	8837.00	-0.58	8579.18	8261.24	7645.83
ASIANPAINT	2731.40	-0.85	2710.01	2632.66	2561.82
AXISBANK	1341.00	0.10	1351.18	1305.74	1273.94
BAJAJ_AUTO	10109.50	0.73	9967.87	10156.22	9468.21
BAJAJFINSV	1885.30	0.78	1773.57	1768.02	1929.74
BAJFINANCE	1042.50	1.30	968.30	939.26	969.10
BEL	419.15	-1.50	415.57	420.68	420.41
BHARTIARTL	1925.80	0.01	1864.10	1851.07	1951.58
CIPLA	1451.80	-1.39	1414.00	1387.64	1416.55
COALINDIA	428.95	-0.79	444.49	456.92	422.71
DRREDDY	1354.60	-0.97	1312.12	1307.45	1268.00
EICHERMOT	7536.00	0.86	7422.15	7250.49	7184.77
ETERNAL	289.40	2.12	261.16	253.93	278.57
GRASIM	3190.90	-0.69	3138.01	3045.34	2849.45
HCLTECH	1168.20	3.00	1120.97	1155.09	1432.90
HDFCBANK	829.30	-0.07	786.50	774.68	891.83
HDFCLIFE	572.45	1.46	575.39	589.97	687.94
HINDALCO	969.50	-1.11	991.39	1045.04	915.38
HINDUNILVR	2208.80	0.31	2176.44	2206.53	2312.92
ICICIBANK	1414.70	-0.86	1358.05	1300.49	1345.46
INDIGO	5395.00	-0.25	5065.15	4664.49	4997.43
INFY	1071.80	2.84	1079.44	1135.06	1392.28
ITC	288.75	0.17	288.57	295.82	344.52

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	243.07	1.28	238.80	239.89	269.80
JSWSTEEL	1246.40	0.26	1257.82	1272.14	1197.69
KOTAKBANK	381.70	0.10	397.64	387.57	406.18
LT	3991.90	-1.22	4099.58	4029.32	3949.11
M&M	3196.40	-0.15	3097.60	3109.49	3395.38
MARUTI	14538.00	0.57	13707.85	13400.94	14802.70
MAXHEALTH	1118.40	-1.25	1081.43	1039.07	1063.28
NESTLEIND	1471.80	-0.13	1415.65	1427.17	1298.80
NTPC	354.20	-0.58	356.83	376.71	356.37
ONGC	244.18	0.11	243.34	268.46	258.50
POWERGRID	284.35	-0.37	287.25	296.60	286.21
RELIANCE	1308.40	-0.98	1304.90	1340.10	1417.91
SBILIFE	1832.30	2.49	1773.04	1810.94	1919.05
SBIN	1038.10	0.04	1029.35	1013.46	1008.06
SHRIRAMFIN	1066.80	0.42	1004.40	970.36	909.17
SUNPHARMA	1903.40	-0.49	1846.06	1830.52	1743.72
TATACONSUM	1125.00	0.64	1109.74	1152.58	1143.89
TATASTEEL	189.79	-0.57	194.12	204.81	189.75
TCS	2096.10	1.87	2116.63	2248.46	2765.74
TECHM	1447.50	2.92	1434.23	1441.89	1487.75
TITAN	4604.20	2.67	4328.47	4262.52	4035.74
TMPV	342.30	-1.37	362.66	363.76	367.68
TRENT	2927.80	-12.44	3091.36	2912.08	2832.31
ULTRACEMCO	11649.00	-0.10	11349.65	11487.68	11858.48
WIPRO	173.00	-0.76	177.39	190.22	223.34



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