

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bearish candle with decrease in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 22995
- Crucial moving average of 20/50 SMA are at 23700 and 23840
- 200 SMA trend deciding level exist at 24878

Indian Equity Market Performance:

Indian equity markets ended Tuesday's session modestly lower, with doubts over possible U.S.-Iran talks in Doha, Fed rate hike jitters and FII selling keeping investors nervous. IT stocks led losses as focus shifted to the upcoming Q1 earning season.

Sectoral Front Performance:

On sectoral front, IT index fell 2.5%, FMCG down 0.6%, media fell 0.8%, while consumer durable and realty indices rose 1% each.

Technical Analysis:

Nifty 50 formed a long bearish candle on the daily chart, indicating weakness amid continued range-bound trade. The index slipped below the 10-day EMA and the 23.6 percent Fibonacci retracement level of the April rally but held above the 20-day and 50-day EMAs on a closing basis, keeping the broader trend intact. The RSI eased to 51 and registered a bearish crossover, signalling fading bullish momentum. The overall setup suggests the index may remain in consolidation unless it breaks decisively above resistance or below support. The 24,100-24,200 zone remains the immediate hurdle. A sustained close above this level could trigger fresh buying and lift the index towards 24,500-24,600, with 24,800 as the next upside target. On the downside, immediate support is placed at 23,800-23,750, where 20-day EMA coincides with 38.2% Fibonacci retracement of the recent rally. A break below this zone could weaken near-term sentiment and increase the risk of a deeper correction.

Option Activity:

On option front, maximum Put OI is at 24000 followed by 23700 strike, while maximum Call OI is at 24000 followed by 25000 strike. Call writing was seen at 24000 strike, followed by 24300 strike while Put writing was seen at 23300 strike, followed by 23900.

Nifty Rollover: 80.27% v/s 69.98% (3- month avg. 73.05%)

Marketwide Rollover: 93.56% v/s 94.24% (3- month avg. 93.94%)

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	52319	136.5	0.26
Nasdaq	26214	393.6	1.52
S&P 500	7499	58.9	0.79
FTSE 100	10497	12.9	0.12
DAX	24996	368.9	1.50
Hang Seng	22881	-145.7	-0.63
Nikkei	70492	429.7	0.61
Sensex	76479	-249.7	-0.33
Nifty	23866	-80.5	-0.34

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	3,989.4	49.10	1.22
Silver (\$/Oz)	58.00	1.92	3.21
Brent Crude (\$/bl)	73.18	0.23	0.32
Dollar Index	101.08	0.12	0.12
USD/INR	94.77	0.11	0.12
USD/YEN	162.73	0.21	0.13
EUR/USD	1.14	0.00	-0.13

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	75604	76099	76478	76924	77584
Nifty	23600	23750	23865	24000	24200
Nifty (Fut)	23744	23894	24009	24144	24344

Pivot Level	
Sensex	76615
Nifty	23910

ECONOMY NEWS

Businesses that rely on commercial cooking gas will see some relief from July 1, with oil marketing companies (OMCs) reducing the price of 19-kg commercial LPG cylinders by ₹183.50 across the country. The reduction comes after months of sharp increases triggered by supply disruptions during the Iran conflict and marks the first cut in commercial LPG prices this year. (BS)

With the cessation of hostilities in West Asia following the signing of an interim peace deal between the US and Iran, the balance of risks has shifted favourably, said the Reserve Bank of India's (RBI's) half-yearly Financial Stability Report. It, however, cautioned that exchange rate volatility could rise if crude oil prices increase due to delayed normalisation of supply chain disruptions. (BS)

India's unemployment rate fell to its lowest level in eight years at 3.1 per cent in 2025, years into the Sustainable Development Goals (SDG) framework that requires the country to deliver "full and productive employment and decent work for all" by 2030. State-level disaggregations released by the National Statistics Office (NSO) show that this improvement hides a worsening picture for women in cities. (BS)

PM Narendra Modi interacted with government secretaries and discussed with them on two key issues - deregulation and other reforms for 'ease of doing business' and 'ease of living' and promoting 'Aatmanirbharta'. (BS)

The government's fiscal deficit widened sharply to ₹1.62 trillion in April-May, over 12-fold higher than a year ago, as pressure on revenue collections became more pronounced despite the record-high surplus transfer from the Reserve Bank of India (RBI) in May. (BS)

Japanese Prime Minister (PM) Sanae Takaichi's three-day visit to India, beginning Wednesday, was shifted from Assam's capital Guwahati to New Delhi due to "logistical issues". However, the country's Northeast region will remain a key focus area of the delegation-level talks led by PMs Narendra Modi and Takaichi, government officials said on Tuesday. (BS)

India's inflation is likely to remain relatively contained in the coming months, supported by the recent correction in crude oil prices and softening of key input costs, including urea, following the cessation of the West Asia conflict, the finance ministry said in its latest Monthly Economic Report released on Tuesday. (BS)



CORPORATE NEWS

Kotak Mahindra Bank has entered into a definitive agreement to acquire Deutsche Bank's retail banking, affluent private banking, and wealth management business in India. The business comprises approximately Rs 29,000 crore in loans, Rs 16,000 crore in deposits, and Rs 10,500 crore in assets under management. It serves around 1.5 lakh customers through a team of about 1,000 employees.

Hexaware Technologies announced the launch of Tensai for Reasoning Ops, the first generally available operating stage of its Tensai Agentic ITOps platform. The platform's agents read live operational signals, reason over enterprise context, and recommend evidence-backed actions, while human experts validate and execute them.

L&T Technology Service launched Ainfonix 4.0, an artificial intelligence-powered platform designed to help process industry companies convert engineering documents and technical records into structured digital data.

Godrej Properties has emerged as the highest bidder for a 4.95-acre residential land parcel in Noida, acquiring the land for Rs 331.75 crore. The proposed residential group housing project is expected to generate estimated revenue of more than Rs 2,000 crore.

KPIT Technologies warned of its June quarter results to be weak. It expects its US Dollar revenue to decline 1 per cent YoY for the June quarter, compared to the same period last year. It also expects EBITDA margin and net margin to decline sequentially during the quarter. Despite the muted start, KPIT said it remains confident of a recovery in the second half of FY27.

NTPC Green Energy's subsidiary Ayana Renewable Power has secured a 193 MW wind power project in the Madhya Pradesh Power Management Company Limited (MPPMCL) auction at a tariff of ₹4.17 per unit.

Glenmark Pharmaceuticals said the USFDA has issued six observations following a good manufacturing practices inspection of its manufacturing facility in Goa.

Zee Entertainment Enterprises has received government approval for a ₹418 crore (about \$46.03 million) foreign investment from OFI Global China Fund LLC under the FDI route.

BULK DEAL

- Genus Power Infrastru Ltd: Chiswick Investment Pte Ltd Sell 10344827 Shares @ Rs. 290
- Ivalue Infosolutions Ltd: Sundara (Mauritius) Limited Sell 5698416 Shares @ Rs. 260.2
- Genus Power Infrastru Ltd: Buoyant Opportunities Strategy-Iii Buy 2241379 Shares @ Rs. 290
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- Krishna Def And Ald Ind L: 360 One Pipe Fund Buy 441646 Shares @ Rs. 1203.47
- Ivalue Infosolutions Ltd: 360 One Pipe Fund Buy 1923000 Shares @ Rs. 260
- Madhusudan Masala Limited: Compact Structure Fund Sell 97000 Shares @ Rs. 215.31
- Energyinf: Rapid Holdings 2 Pte Limited Sell 39750000 Shares @ Rs. 76.01
- Energyinf: Neo Real Asset Yield Fund Buy 3925000 Shares @ Rs. 76
- Cgfl: Minerva Ventures Fund Sell 1611832 Shares @ Rs. 30
- Accordts: Vikasa India Eif I Fund-Incube Global Opportunities Sell 108000 Shares @ Rs. 59.12

INSIDER TRADE

ACQUISITION

- * Liberty Shoes Ltd: Promoter, Acquisition 65000 shares on 29-Jun-26
- * T T Ltd- $\text{\$}$: SANJAY KUMAR JAIN, Promoter Group, Acquisition 34251 shares on 24-Jun-26
- * Confidence Petroleum India Ltd: CONFIDENCE LPG BOTTLING PRIVATE LIMITED, Promoter Group, Acquisition 1400000 shares on 25-Jun-26
- * Gng Electronics Ltd: Ajay Pancholi, Director, Acquisition 42000 shares on 29-Jun-26
- * Neogen Chemicals Ltd: Cadamba Solutions Private Limited, Promoter Group, Acquisition 700000 shares

DISPOSAL

- * Liberty Shoes Ltd: ARPAN GUPTA KARTA DINESH KUMAR GUPTA HUF, Promoter Group, Disposal 20000 shares on 25-Jun-26
- * Salasar Techno Engineering Ltd: Promoter Group, Disposal 40506141 shares
- * Indian Railway Finance Corporation Ltd: The President of India acting through and represented by the Ministry of Railways Government of India, Promoter, Disposal 228744407 shares on 24-Jun-26
- * Neogen Chemicals Ltd: Promoter, Disposal 700000 shares
- * Inox India Ltd: Manju Jain, Promoter Group, Disposal 6000 shares on 22-Jun-26

PLEDGE

- * Black Buck Ltd: Ramasubramanian Balasubramaniam, Promoter & Director, Pledge 630000 shares on 29-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
OLAELEC	43.8	8.3%	SCHNEIDER	1362.5	-6.3%
TARIL	354.7	6.6%	KPITTECH	670.5	-5.9%
BALRAMCHIN	559.7	6.2%	ZFCVINDIA	2556.0	-4.8%
COCHINSHIP	1514.0	6.1%	TATATECH	683.0	-4.5%
MARUTI	14152.0	5.5%	EICHERMOT	7101.0	-4.4%
COROMANDEL	2015.2	5.3%	BSOFT	286.6	-4.2%
APTUS	281.0	5.2%	RRKABEL	2400.0	-4.1%
SOLARINDS	18685.0	5.0%	TATAELXSI	3825.7	-3.9%
CGCL	227.4	5.0%	LTM	3543.0	-3.9%
KPRMILL	1184.0	4.6%	TATACONSUM	1073.0	-3.6%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	23,432.58	16,590.24	6,842.34
FII	23,273.71	25,830.46	-2,556.75

Category	30/06/2026	29/06/2026	25/06/2026	24/06/2026	23/06/2026	22/06/2026
DII	6,842.34	2,801.45	5,747.75	3,637.26	680.21	1,035.72
FII	-2,556.75	-1,350.10	383.76	-1,843.40	17.86	-635.91

DERIVATIVE REPORT

- Nifty closed at 23865.75 a decline of 0.34% on the last day of June. expiry. Nifty declined by 0.20% in June Expiry against a decline of 0.34% in May (expiry to expiry). Nifty started the month with 154.45 lakh shares in open Interest and stock future with 1599.61 lakh cr shares in open interest
- Nifty PCR is at 1.04 against 1.04 on the first day of July. expiry.
- Total Nifty Calls started with 130 lakh shares in open interest against 130 lakh shares in last month.
- Total Nifty Puts started with 136 lakh shares in open interest against 136 lakh shares in last month.
- Maximum open interest (Nifty) in Calls for July. series is at 25000 and 23000 put.
- FII's sold net Rs. 2,407.87 Cr(provisional), while DIIs bought net Rs. 1,361.43 Cr in cash market.
- FII sold net Rs. 41922.56 Cr in F&O
- Securities in Ban Period: - NIL

NIFTY TRACKER

	30.06.2026	29.06.2026	25.06.2026	24.06.2026
Spot	23865.75	23946.25	24056.00	24021.65
% Change in Spot	-0.34%	-0.46%	0.14%	0.83%
Nifty(FUT) June.	23865.75	23972.9	24102.3	24051.8
Nifty(FUT) June. Vol.	66588	75442	87672	89318
Nifty(FUT) June. - OI	4780620	6888245	9944155	13134745
Nifty(FUT) July.	24009.1	24037.7	24170.5	24125.2
Nifty(FUT) July. Vol.	124254	80436	72399	59648
Nifty(FUT) July. - OI	17938180	12749815	9165650	6129305

TRADE STATISTICS FOR 30.06.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	33,22,325	2,17,09,772	-
Index Options	46,64,72,755	85,18,847	0.99
Stock Options	78,26,964	7,03,799	0.59
Index Futures	2,62,474	42,06,327	-
NSE F&O Total Turnover	47,78,84,518	3,51,38,745	0.99
NSE Cash Turnover		1,40,407.22	
BSE Cash Turnover		10,97,333.00	
Total Turnover	-	36376485	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	30/06/2026		29/06/2026		25/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-6812	-5232	-1800	4541	811	762
Index option	-10539	-329155	6467	84409	4286	30590
Stock Future	-1576	-25964	2343	-5425	188	4984
Stock option	-1343	-76136	-1786	-7207	779	4854
Total	-20270	-436487	5224	76318	6064	41189

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	30/06/2026	29/06/2026	25/06/2026	24/06/2026	23/06/2026
Index Futures	8905	2535	499	1836	1259
Index Options	9503	-599	1638	474	-3990
Stock Futures	267916	346107	99564	-728701	392747
Stock Options	-20765	-16099	-2664	2238	-2396
F&O Total	265559	331944	99036.98	-724152.54	387620.21

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	4,75,38,73,725	5,62,97,99,850	14.55	0.55%	18.43%
IOC	9,07,28,625	12,58,92,000	140.41	0.14%	38.76%
IDFCFIRSTB	33,94,00,075	37,06,93,925	79.82	1.20%	9.22%
ETERNAL	19,14,92,550	22,23,33,700	266.55	2.22%	16.11%
ASHOKLEY	13,89,15,000	16,90,00,000	159.34	0.40%	21.66%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	1,15,16,64,100	1,33,54,02,900	24.39	-3.60%	15.95%
NMDC	28,27,17,000	35,19,92,250	85.61	-0.19%	24.50%
CANBK	29,82,01,500	34,34,33,250	126.75	-0.18%	15.17%
PNB	26,41,92,000	29,94,96,000	107.6	-0.21%	13.36%
SAIL	14,81,72,200	17,72,98,100	175.25	-0.02%	19.66%

NIFTY OPTION OPEN INTEREST STATISTICS

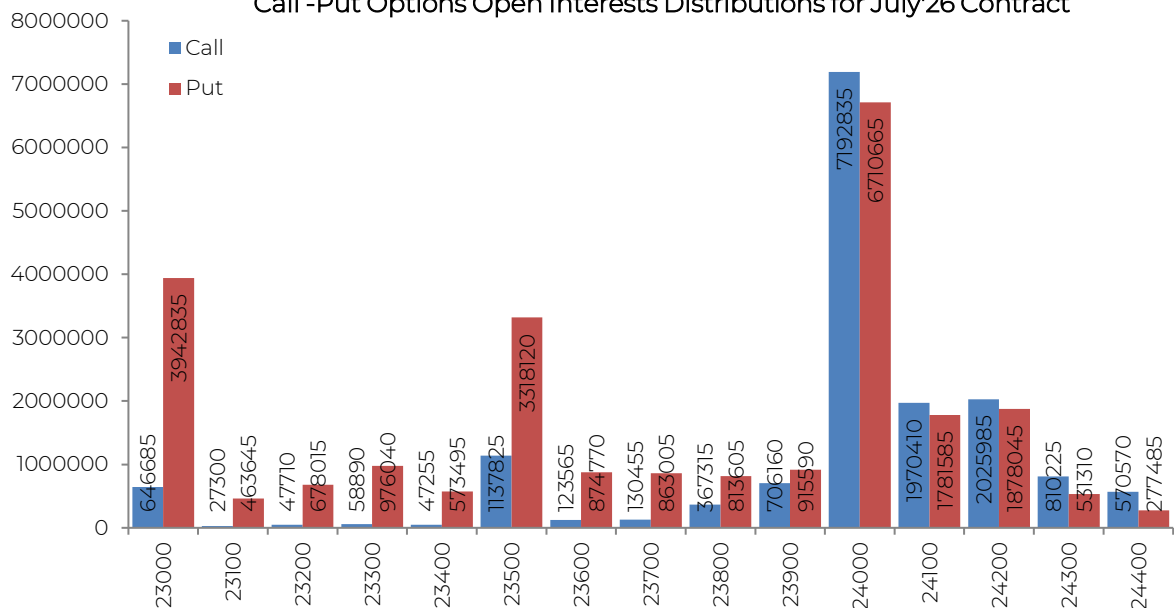
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
7-Jul-26	24000	CE	139.85	681317	7076680	3868800
7-Jul-26	23300	PE	11.35	268915	4842890	3277300
7-Jul-26	23400	PE	18.1	272697	5275725	3267485
7-Jul-26	25500	CE	1.65	253869	5551520	3246815
7-Jul-26	22000	PE	2.4	134166	4959370	3061955
7-Jul-26	24300	CE	45	306172	4247815	2665975
7-Jul-26	23000	PE	5.1	182359	4596800	2610270
7-Jul-26	25000	CE	3.65	197995	5332925	2598700
7-Jul-26	24500	CE	19.05	336621	5557045	2170090
7-Jul-26	23600	PE	43.65	283268	3148730	2149290

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
25-Aug-26	23000	PE	135.05	9305	726765	-76440
7-Jul-26	24150	PE	280.35	15644	220675	-33345
14-Jul-26	24200	PE	364.85	2786	120380	-27365
7-Jul-26	24100	PE	246	100541	1495130	-16445
28-Jul-26	24200	CE	262.9	29827	2025985	-11180
28-Jul-26	25050	CE	44.35	714	44460	-7150
28-Jul-26	25600	CE	12.55	1676	184080	-6305
28-Jul-26	25900	CE	6.85	574	67600	-4095
28-Jul-26	24750	CE	89.35	1176	68900	-3250
28-Jul-26	24150	PE	419.6	472	52715	-2860

Call -Put Options Open Interests Distributions for July'26 Contract



STOCK OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
IDEA	28-Jul-26	15	CE	0.45	4356	383963700	73690725
IDEA	28-Jul-26	15	PE	0.85	1793	180688800	63469800
IDEA	28-Jul-26	13	PE	0.2	1726	119363250	37238475
IDEA	28-Jul-26	14	PE	0.4	1833	104782350	29376225
IDEA	28-Jul-26	16	CE	0.25	2485	184548450	22443150
IDEA	28-Jul-26	14	CE	1	1570	147738825	21942825
IDEA	28-Jul-26	17	CE	0.15	1295	79265775	17511375
IDEA	28-Jul-26	18	CE	0.1	1062	111072150	15581550
YESBANK	28-Jul-26	28	CE	0.2	2322	70192700	14181600
IDEA	28-Jul-26	13	CE	1.75	374	51533475	12436650

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
ABCAPITAL	28-Jul-26	430	CE	3.75	3228	4674800	-2855100
ONGC	28-Jul-26	230	PE	3.85	5439	2236500	-2002500
ONGC	28-Jul-26	225	PE	2.45	2764	3523500	-1838250
GMRAIRPORT	28-Jul-26	110	CE	5.6	1880	12192300	-837000
NHPC	28-Jul-26	88	CE	0.55	586	13371800	-743650
YESBANK	28-Jul-26	24	CE	1.2	1280	30415800	-715300
MOTHERSON	28-Jul-26	155	CE	3.5	560	2952000	-639600
RELIANCE	28-Jul-26	1400	CE	7.15	16169	8925000	-635500
LAURUSLABS	28-Jul-26	1500	CE	62.3	2452	922250	-578850
BANDHANBNK	28-Jul-26	240	CE	1.15	489	1465200	-561600

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