

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bullish candle with decrease in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 23017
- Crucial moving average of 20/50 SMA are at 23723 and 23832
- 200 SMA trend deciding level exist at 24874

Indian Equity Market Performance:

Indian equity markets rose notably on Wednesday after two straight sessions of losses. Sentiment was underpinned by a continued fall in oil prices in international markets as well as robust June sales reported by domestic auto manufacturers.

Sectoral Front Performance:

On the sectoral front, realty index up 3%, FMCG and media indices up 2% each, auto and PSU Bank indices up 1% each, while IT index shed 2%, while metal index down 1% and pharma index down 0.5%.

Technical Analysis:

Nifty 50 formed a bullish candle within the previous session's bearish candle on the daily chart, indicating a positive bias despite continued range-bound trade. The index reclaimed the 10-day EMA while holding above the 20-day and 50-day EMAs. Notably, the 20-day EMA is close to crossing above the 50-day EMA, reinforcing the bullish outlook. Momentum indicators remain supportive, with the RSI rising to 55 and nearing a bullish crossover. The broader trend remains positive, although momentum has moderated, suggesting the index is gearing up for a decisive breakout, aided by subdued crude oil prices. As long as Nifty holds above the 24,000 mark, it may advance towards the 24,200-24,300 resistance zone. A sustained move above this hurdle could pave the way for 24,500. On the downside, the 23,900-23,850 zone is expected to act as immediate support, coinciding with the 20-day EMA and the 38.2 percent Fibonacci retracement of the recent rally. A break below this level could weaken near-term sentiment, though the gradually rising support base continues to favour the bulls.

Option Activity:

On the option front, maximum Put OI is at 24000 followed by 23900 strike, while maximum Call OI is at 24000 followed by 24500 strike. Call writing was seen at 24000 strike, followed by 24050 strike while Put writing was seen at 24000 strike, followed by 23900.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	52305	-14.0	-0.03
Nasdaq	26040	-173.7	-0.66
S&P 500	7483	-16.1	-0.22
FTSE 100	10478	-18.8	-0.18
DAX	25040	44.5	0.18
Hang Seng	23120	238.5	1.04
Nikkei	69722	-753.0	-1.07
Sensex	76923	444.0	0.58
Nifty	24006	140.1	0.59

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	4,066.5	15.90	0.39
Silver (\$/Oz)	60.33	0.18	0.30
Brent Crude (\$/bl)	70.76	0.81	1.13
Dollar Index	101.11	-0.04	-0.04
USD/INR	95.26	0.01	0.01
USD/YEN	162.50	-0.06	-0.04
EUR/USD	1.14	0.00	0.08

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	75586	76246	76922	77566	77896
Nifty	23600	23800	24005	24200	24300
Nifty (Fut)	23688	23888	24093	24288	24388

Pivot Level	
Sensex	76857
Nifty	23984

ECONOMY NEWS

India's power consumption grew by 11.62 per cent to 166.46 billion units (BU) in June compared to the same month last year due to heat wave conditions and late onset of monsoon across the country, which pushed usage of cooling appliances like air conditioners, according to official data. The country's total power consumption was 149.13 BU in June 2025. The peak power demand also jumped to 264.76 GW last month from 242.77GW in June 2025. (BS)

Aviation Turbine Fuel (ATF) and commercial Liquefied Petroleum Gas (LPG) prices were cut on Wednesday as easing tensions in West Asia pulled down international oil prices, while private fuel retailer Nayara Energy lowered petrol and diesel prices, becoming the first retailer in more than two years to reduce pump rates. (BS)

Gross and net goods and services tax (GST) collections rose 13.9 per cent and 11.2 per cent year-on-year (Y-o-Y), respectively, in June, with the growth largely driven by robust revenues from imports even as domestic collections remained subdued. (BS)

India's imports of Russian crude oil climbed to a record 2.58 million barrels per day (bpd) in June, driven by constrained supplies from West Asian producers and discounts offered by Moscow, amid subdued demand from China. (BS)

India's private sector manufacturing activity expanded at its slowest pace in three months in June as growth in international sales, output, purchasing activity and employment moderated, a private survey showed. HSBC's India Manufacturing Purchasing Managers' Index (PMI), which tracks monthly changes in manufacturing activity, fell to 54.2 in June from 55 in May. (BS)

Russia has started seaborne imports of gasoline from India, two industry sources said on Wednesday, in an effort to mitigate fuel shortages triggered by Ukrainian attacks on its energy infrastructure. Fuel shortages are being felt across Russia's 11 time zones with rationing, long queues at filling stations and a record gasoline price increase. (BS)

Finance Minister Nirmala Sitharaman began a four-day visit to France to further strengthen the India-France strategic partnership, with a focus on economic cooperation, investment, technology collaboration and innovation. (BS)



CORPORATE NEWS

L&T Technology Services, Wipro, IBM India, Tata Consultancy Services (TCS), and Infosys are competing for a contract to build India's new Customs Integrated System (CIS), a unified digital platform for cross-border trade. The central government is expected to invite bids within about 15 days for the project, which aims to streamline customs processes, accelerate export-import clearances, and reduce trade costs.

Lupin has received the Establishment Inspection Report (EIR) from the United States Food and Drug Administration for its manufacturing facility in Somerset, New Jersey, with a satisfactory Voluntary Action Indicated (VAI) classification. Separately, the European Medicines Agency (EMA) has approved a variation to the marketing authorisation for NaMuscla, supported by the Paediatric Investigation Plan (PIP).

Hero MotoCorp announced its second Global Parts Centre (GPC) in Tirupati, Andhra Pradesh, with an investment of more than Rs 750 crore. With this, its total investment in the state will exceed Rs 3,200 crore.

Tata Technologies and Tenneco LLC have strengthened their global partnership for mobility transformation. Tenneco is expected to invest more than \$100 million in this engagement over the next five years.

Bharti Airtel's subsidiary, Airtel Money, has commenced commercial operations as a Type II non-deposit-taking non-banking financial co.

Coal India has received a Letter of Award worth Rs 2,831.11 crore from Bundelkhand Saur Urja Limited for setting up a 600 MW solar plant.

Sai Parenterals Australian subsidiary, Noumed Pharmaceuticals, has renewed its long-term exclusive OTC Medicines Supply Agreement with Australia's multi-billion-dollar pharmacy chain. The renewed agreement is valued at AUD 202 million (approximately Rs 1,300 crore) over an extended tenure of seven and a half years.

NLC India Renewables, a subsidiary of NLC India, has received a Letter of Award from Bundelkhand Saur Urja Limited for setting up 600 MW of solar power projects (2x300 MW) at the Jalaun Solar Power Park in Uttar Pradesh through tariff-based competitive bidding.

Srivasavi Adhesive Tapes polymer division in Bengaluru Rural has entered into a purchasing agreement with a global multinational company (MNC), becoming a supplier of PP, HDPE, fabric, and related products.

BULK DEAL

- Advit Jewels Limited: Holani Venture Capital Fund- I Buy 370000 Shares @ Rs. 180.74
- Shreedhar Spinners Ltd: 31 Degrees North India Opportunities Fund Sell 152000 Shares @ Rs. 54.4
- Shreedhar Spinners Ltd: Kuber India Opportunity Fund Sell 152000 Shares @ Rs. 54.4
- Shreedhar Spinners Ltd: 31 Degrees North Growth Fund Sell 150000 Shares @ Rs. 54.4
- Shreedhar Spinners Ltd: 31 Degrees North Fund I Sell 150000 Shares @ Rs. 54.4
- Jivial: Nexus Global Opportunities Fund Buy 106800 Shares @ Rs. 156.8
- Gel: Unicorn Fund Buy 126000 Shares @ Rs. 35.06
- Ontic: Akalpya India Equity Fund Sell 890980 Shares @ Rs. 2.01

INSIDER TRADE

ACQUISITION

- * Ncl Industries Ltd- $\$$: Promoter Group, Acquisition 19370 shares
- * Skipper Ltd: Promoter Group, Acquisition 849254 shares
- * Asahi India Glass Ltd: Promoter Group, Acquisition 117000 shares
- * Linc Ltd- $\$$: NIYATI SHARMA, Promoter Group, Acquisition 100000 shares on 29-Jun-26
- * Maharashtra Seamless Ltd: Odd & Even Trades & Finance Limited, Promoter Group, Acquisition 1659700 shares on 29-Jun-26

DISPOSAL

- * Axiscades Technologies Ltd: Jupiter Capital Private Limited, Promoter, Disposal 1000000 shares on 30-Jun-26
- * Deccan Gold Mines Ltd: SUBRAMANIAM SUNDARAM, Director, Disposal 150000 shares on 29-Jun-26
- * Inox India Ltd: Parag Padmakar Kulkarni, Director, Disposal 71000 shares on 22-Jun-26
- * Skipper Ltd: Utsav Ispat LLP, Promoter Group, Disposal 424627 shares on 29-Jun-26
- * Asahi India Glass Ltd: Malathi Raghunand, Promoter Group, Disposal 48000 shares on 22-Jun-26
- * National Oxygen Ltd: RAJESH KUMAR SARAF, Director, Disposal 166678 shares
- * Skipper Ltd: Utsav Ispat LLP, Promoter Group, Disposal 424627 shares on 29-Jun-26
- * Linc Ltd- $\$$: BIMLA DEVI JALAN, Promoter Group, Disposal 100000 shares on 29-Jun-26
- * Maharashtra Seamless Ltd: Saket Jindal, Promoter, Disposal 1629700 shares on 29-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
RITES	230.8	12.9%	KPITTECH	561.0	-16.5%
RPOWER	27.1	8.9%	APARINDS	14605.0	-6.9%
DELHIVERY	509.1	7.8%	COFORGE	1367.9	-6.7%
IKS	1805.0	7.5%	TATAELXSI	3584.9	-6.4%
HEXT	550.0	6.8%	HSCL	645.0	-5.0%
TBOTEK	1522.0	6.5%	IGL	156.9	-4.8%
AEGISLOG	1248.0	6.3%	TATACHEM	683.0	-4.6%
ETERNAL	280.0	5.8%	GESHIP	1417.0	-4.5%
PAYTM	1205.9	5.6%	SAIL	166.5	-4.0%
RHIM	388.0	5.5%	BSOFT	276.5	-3.4%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	17,136.57	13,977.33	3,159.24
FII	11,623.31	12,763.81	-1,140.50

Category	01/07/2026	30/06/2026	29/06/2026	25/06/2026	24/06/2026	23/06/2026
DII	3,159.24	6,842.34	2,801.45	5,747.75	3,637.26	680.21
FII	-1,140.50	-2,556.75	-1,350.10	383.76	-1,843.40	17.86

DERIVATIVE REPORT

- Nifty gained by 0.59% with Nifty future added 0.50 lakh shares in open interest and stock
- Stock future added 1335.1 Lakh shares in open interest.
- Nifty PCR increased to 1.13 from 0.97
- Total Nifty Calls added 549.5 lakh shares in open interest.
- Total Nifty Puts added 841.7 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for July. series is at 24000 and 24000 put.
- FII's sold net Rs. 1,140.50 Cr (provisional), while DIIs bought net Rs. 3,159.24 Cr in cash market
- FII sold net Rs. 8658.99 Cr in F&O
- Securities in Ban Period: - NIL

NIFTY TRACKER

	01.07.2026	30.06.2026	29.06.2026	25.06.2026
Spot	24005.85	23865.75	23946.25	24056.00
% Change in Spot	0.59%	-0.34%	-0.46%	0.14%
Nifty(FUT) July.	24092.6	24009.1	24037.7	24170.5
Nifty(FUT) July. Vol.	37059	124254	80436	72399
Nifty(FUT) July. - OI	17896580	17938180	12749815	9165650
Nifty(FUT) Aug.	24195.3	0	0	0
Nifty(FUT) Aug. Vol.	2945	0	0	0
Nifty(FUT) Aug. - OI	1553435	0	0	0

TRADE STATISTICS FOR 01.07.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	10,04,869	67,36,185	-
Index Options	4,65,26,489	31,24,592	0.89
Stock Options	50,69,169	7,63,949	0.5
Index Futures	64,419	10,51,218	-
NSE F&O Total Turnover	5,26,64,946	1,16,75,944	0.84
NSE Cash Turnover		1,19,242.61	
BSE Cash Turnover		9,94,130.00	
Total Turnover	-	12789317	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	01/07/2026		30/06/2026		29/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-586	458	-6812	-5232	-1800	4541
Index option	-6738	79717	-10539	-329155	6467	84409
Stock Future	-492	4327	-1576	-25964	2343	-5425
Stock option	-843	9572	-1343	-76136	-1786	-7207
Total	-8659	94073	-20270	-436487	5224	76318

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	01/07/2026	30/06/2026	29/06/2026	25/06/2026	24/06/2026
Index Futures	-15369	8905	2535	499	1836
Index Options	-46303	9503	-599	1638	474
Stock Futures	-983929	267916	346107	99564	-728701
Stock Options	-183153	-20765	-16099	-2664	2238
F&O Total	-1228754	265559	331944.31	99036.98	-724152.54

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	5,59,89,94,125	5,61,40,75,350	14.7	1.10%	0.27%
ETERNAL	21,89,31,425	22,72,54,025	281.2	5.73%	3.80%
ADANIPOWER	12,12,18,300	12,91,80,950	227.78	1.04%	6.57%
ASHOKLEY	16,60,40,000	17,11,40,000	162.96	2.52%	3.07%
YESBANK	1,32,53,26,500	1,32,98,67,100	24.60	1.07%	0.34%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
WIPRO	33,15,75,000	35,38,74,000	167.21	-1.81%	6.73%
NMDC	35,18,57,250	36,66,46,500	84.8	-1.14%	4.20%
SAIL	17,69,03,300	18,58,56,800	166.66	-4.71%	5.06%
KPITTECH	75,93,450	1,29,13,050	550.25	-17.09%	70.06%
HDFCBANK	32,83,85,850	33,25,09,450	801.40	-0.19%	1.26%

NIFTY OPTION OPEN INTEREST STATISTICS

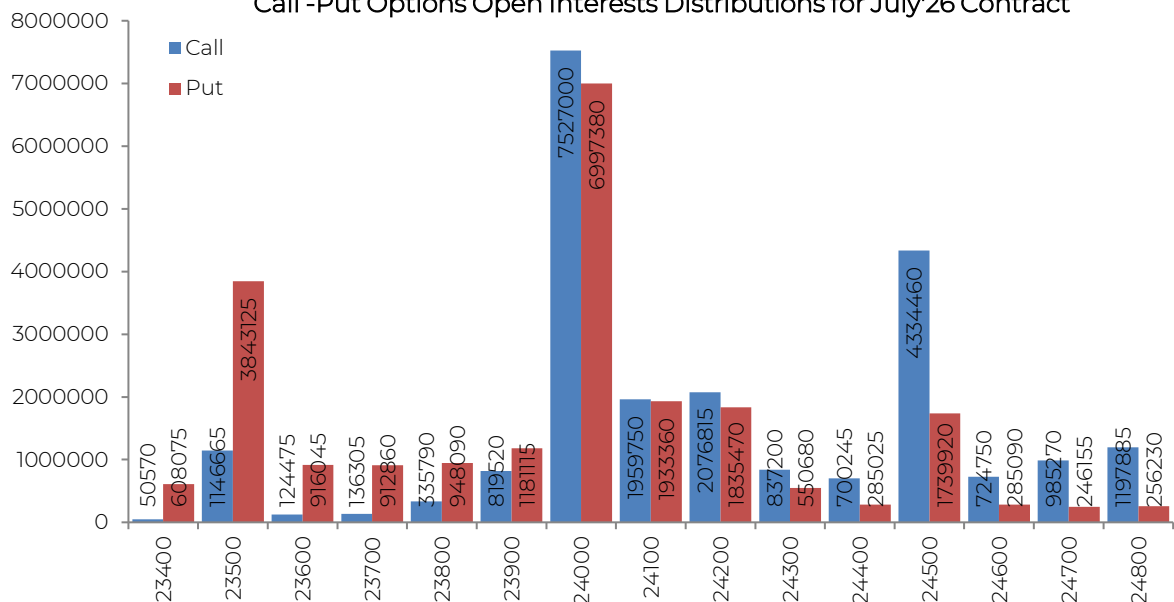
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
7-Jul-26	24000	PE	131.7	3340150	11766105	6505395
7-Jul-26	24000	CE	162.65	3431617	11281530	4204850
7-Jul-26	23900	PE	92.65	2351816	7272330	4007055
7-Jul-26	24050	CE	137.65	1602935	4319510	2983500
7-Jul-26	24050	PE	154.8	1059777	3284515	2592915
7-Jul-26	23000	PE	4.25	420946	7166315	2569515
7-Jul-26	23950	PE	110.3	1520025	3548805	2275585
7-Jul-26	24200	CE	74.55	1650562	6425250	2107495
7-Jul-26	25000	CE	2.55	488395	7366970	2034045
7-Jul-26	24600	CE	9	501244	4802655	1976780

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
7-Jul-26	23850	CE	257.45	262130	338325	-347035
7-Jul-26	23900	CE	223.15	1341873	2624700	-308490
7-Jul-26	23750	CE	331.55	48520	155350	-270010
7-Jul-26	23800	CE	292.75	312128	1147315	-225810
28-Jul-26	23850	PE	223.05	8385	132990	-195455
7-Jul-26	26200	CE	0.65	17979	415285	-93340
14-Jul-26	25100	CE	6.5	13736	172250	-80015
7-Jul-26	25350	CE	1.35	25188	124475	-66495
14-Jul-26	23100	PE	17.4	23454	271830	-54080
29-Sep-26	25500	CE	176.25	4985	1094535	-47255

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
YESBANK	28-Jul-26	27	CE	0.45	8815	109938500	84063300
IDEA	28-Jul-26	15	CE	0.55	5892	426777225	42813525
IDEA	28-Jul-26	16	CE	0.25	3683	217712850	33164400
YESBANK	28-Jul-26	28	CE	0.3	6147	98835800	28643100
YESBANK	28-Jul-26	26	CE	0.65	4672	77563400	24506800
IDEA	28-Jul-26	14	PE	0.35	2408	127011075	22228725
IDEA	28-Jul-26	17	CE	0.15	2394	101065650	21799875
IDEA	28-Jul-26	13	CE	1.9	487	72761550	21228075
YESBANK	28-Jul-26	22	PE	0.2	1399	38906100	17727000
ASHOKLEY	28-Jul-26	165	CE	5.4	12159	17850000	12885000

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
GMRAIRPORT	28-Jul-26	115	CE	3.55	2223	11166975	-2204100
SUZLON	28-Jul-26	50	PE	0.3	364	5511800	-1130300
GMRAIRPORT	28-Jul-26	112	CE	5.05	626	1694925	-1067175
COALINDIA	28-Jul-26	410	PE	2.3	1494	525150	-984150
ETERNAL	28-Jul-26	260	CE	24.1	1777	2100050	-865725
DELHIVERY	28-Jul-26	500	CE	22.35	10185	1998225	-690975
LTF	28-Jul-26	310	CE	13.9	1826	1433250	-639000
EXIDEIND	28-Jul-26	410	CE	6.55	861	1141200	-484200
ADANIENT	28-Jul-26	3100	CE	132.55	12541	1028970	-483894
PNB	28-Jul-26	97	PE	0.4	113	1264000	-472000

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