

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 23073
- Crucial moving average of 20/50 SMA are at 23805 and 23822
- 200 SMA trend deciding level exist at 24868

Indian Equity Market Performance:

Indian equity markets rose for a third straight session on Friday, even as markets ended off their day's highs due to profit booking at higher levels.

Sectoral Front Performance:

On the sectoral front, buying interest seen in IT, realty, pharma, auto and metal stocks amid supportive global cues and easing crude oil prices. However, PSU banks, media and select power stocks witnessed mild profit booking,

Technical Analysis:

Nifty 50 ended with a bearish candlestick after briefly nearing the 24,400 mark, as profit booking at higher levels limited gains despite the index holding above the key 24,200 resistance zone and the falling trendline. While the price action indicates hesitation around a crucial resistance area, the broader trend remains constructive, with the index continuing to trade above its short- and medium-term moving averages as well as the 100-day EMA. Momentum indicators also remained supportive, with the RSI rising to 61 and generating a bullish crossover, while lower India VIX and subdued crude oil prices added to positive market sentiment. A sustained move above 24,400 could pave the way for an advance towards the 24,500–24,600 zone, the previous swing highs. Until then, the index is likely to remain range-bound, with immediate support seen at 24,200–24,100, followed by the key 24,000 level.

Option Activity:

On the option front, maximum Put OI is at 24000 followed by 24300 strike, while maximum Call OI is at 24300 followed by 24400 strike. Call writing was seen at 24300 strike, followed by 24350 strike while Put writing was seen at 24300 strike, followed by 24200.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	52900	594.8	1.14
Nasdaq	25833	-207.4	-0.80
S&P 500	7483	0.0	0.00
FTSE 100	10679	26.2	0.25
DAX	25779	198.4	0.78
Hang Seng	23436	85.5	0.37
Nikkei	69226	-518.6	-0.74
Sensex	77764	261.8	0.34
Nifty	24271	95.2	0.39

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	4,209.2	83.50	2.02
Silver (\$/Oz)	63.08	2.02	3.30
Brent Crude (\$/bl)	71.78	0.34	0.47
Dollar Index	100.72	0.10	0.10
USD/INR	95.22	-0.19	-0.19
USD/YEN	161.79	0.41	0.25
EUR/USD	1.14	0.00	-0.06

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	77199	77529	77763	78189	78684
Nifty	24100	24200	24271	24400	24550
Nifty (Fut)	24181	24281	24352	24481	24631

Pivot Level	
Sensex	77877
Nifty	24300

ECONOMY NEWS

Commerce and Industry Minister Piyush Goyal on Saturday said a proposed free trade agreement (FTA) between India and Peru is unlikely to be concluded in the near term, citing unresolved concerns over market access for certain products. (BS)

The finance ministry has notified rules for determining the origin of goods under the India-United Kingdom Comprehensive Economic and Trade Agreement (CETA), clearing the way for the trade pact to come into force on July 15. (BS)

The government has withdrawn most provisions of the emergency natural gas supply regulation order imposed during the West Asia conflict after liquefied natural gas (LNG) shipments through the Strait of Hormuz resumed following a ceasefire. (BS)

The government on Sunday said that 15 vessels bound for India, carrying fertilisers and key raw materials used in their production, have crossed the Strait of Hormuz since tensions between Iran and the US eased. According to an official statement, these vessels include eight carrying 0.33 million tonnes of urea, four carrying 0.25 million tonnes of Di-Ammonium Phosphate (DAP), and three carrying 0.11 million tonnes of sulphur. (BS)

Prime Minister (PM) Narendra Modi will be in Indonesia, Australia, and New Zealand from July 6 to 11. The visit is expected not only to strengthen India's trade ties with these countries, but will also seek to deepen New Delhi's defence and maritime security relations with Jakarta and Canberra as India tries to give a concrete shape to its 'Indo-Pacific' vision. (BS)

Assam witnessed a 15 per cent growth in GST collection in June compared to the corresponding period a year ago, Finance Minister Jayanta Malla Baruah said on Saturday. The GST collection in June stood at ₹1,437 crore as against ₹1,255 crore in the same month last year. (BS)

Commerce and Industry Minister Piyush Goyal, External Affairs Minister S Jaishankar and Electronics and Information Technology Minister Ashwini Vaishnaw will travel to Brussels soon for the India-European Union Trade and Technology Council (TTC) dialogue, which will complement the recently concluded India-EU free trade agreement (FTA) and help facilitate its implementation, Goyal said on Saturday. (BS)



CORPORATE NEWS

HDFC Bank has reported gross advances at ₹30.61 lakh crore at the end of Q1. This marks a 15.4 per cent Y-o-Y growth. Its deposits rose 14.7 per cent Y-o-Y to ₹31.71 lakh crore and gross advances increased 15.4 per cent Y-o-Y to ₹30.61 lakh crore. CASA deposits rose 9.4 per cent YOY to Rs 10.25 lakh crore for the quarter.

Coal India's coal production fell 7.5 per cent Y-o-Y in Q1, marking one of the steepest quarterly declines for the state-owned miner. It produced 169.6 million tonnes (MT) of coal in the quarter.

Kotak Mahindra Bank reported a 15.1 per cent YoY growth in net advances to Rs 5.12 lakh crore for the June 2026 quarter, while total deposits rose 11.7 per cent YoY to Rs 5.72 lakh crore. CASA deposits increased 10.2 per cent YoY to Rs 2.31 lakh crore during the quarter.

IndusInd Bank reported a 2.3 per cent YoY decline in net advances to Rs 3.26 lakh crore in the June 2026 quarter, while deposits rose 4.5 per cent YoY to Rs 4.15 lakh crore. Its CASA ratio moderated to 29.5 per cent from 31.5 per cent a year ago.

Dabur expects to report double-digit consolidated revenue and profit growth for the June 2026 quarter. International business is expected to grow in the high teens in rupee terms. The home and personal care segment is projected to deliver near-teen growth, with hair oils and shampoos expected to register high-teen growth.

Godrej Consumer Products expects high-teen consolidated revenue growth in the June 2026 quarter, supported by strong high single-digit underlying volume growth. It expects EBITDA growth to exceed its earlier guidance despite margin pressures. Its Africa, USA and Middle East businesses are expected to deliver strong double-digit sales growth.

PTC India has entered into a Power Purchase Agreement (PPA) with NTPC Renewable Energy, a wholly owned subsidiary of NTPC Green Energy, for the purchase of 1,200 MW of solar power under a bilateral arrangement.

Fortis Healthcare has signed an Operations and Management (O&M) agreement with Dion Group for a 300-bed greenfield multi-specialty hospital to be developed at Dion Riverside Township, Trishulia, Cuttack, Odisha.

BULK DEAL

- Pb Fintech Limited: Macritchie Investments Pte Limited Sell 10179920 Shares @ Rs. 1604.12
- Modis Navnirman Ltd: Aegis Investment Fund Buy 175000 Shares @ Rs. 335
- Value 360 Communication L: Nova Global Opportunities Fund Pcc - Touchstone Sell 88800 Shares @ Rs. 87.95
- Crazy: Unicorn Fund Buy 282000 Shares @ Rs. 44



INSIDER TRADE

ACQUISITION

- * Senco Gold Ltd: Jai Hanuman Shri Siddhivinayak Trust Trustee- Mr. Suvankar Sen & Mrs. Joita Sen , Promoter, Acquisition 8920 shares on 30-Jun-26
- * Ganesh Consumer Products Ltd: Manish Mimani, Promoter and Director, Acquisition 31100 shares on 30-Jun-26
- * Lakshmi Engineering And Warehousing Ltd: SMT AISHWARYA PATHY, Promoter and Director, Acquisition 250 shares on 18-Jun-26

DISPOSAL

- * Salasar Techno Engineering Ltd: Alok Kumar, Promoter and Director, Disposal 349601 shares on 30-Jun-26
- * Salasar Techno Engineering Ltd: Shikhar Fabtech Private Limited, Promoter Group, Disposal 9952283 shares on 30-Jun-26
- * Salasar Techno Engineering Ltd: Base Engineering LLP, Promoter Group, Disposal 74575 shares on 29-Jun-26

INVOKE

- * Parsvnath Developers Ltd: PRADEEP KUMAR JAIN, Promoter, Invoke 196025 shares on 30-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
SUMICHEM	59.8	13.55	POWERINDIA	-2730.0	-8.08
ZENSARTECH	46.9	10.02	GVT&D	-377.8	-7.83
AEGISVOPAK	23.5	10.00	ENRIN	-249.5	-7.03
ECLERX	93.7	6.73	CGPOWER	-65.0	-6.78
HCLTECH	61.9	5.74	APARINDS	-1004.0	-6.65
LODHA	54.9	5.46	THERMAX	-307.0	-6.27
M&MFIN	17.2	5.39	POLICYBZR	-96.1	-5.71
KAYNES	167.5	5.30	TARIL	-20.4	-5.70
HFCL	10.2	5.00	RHIM	-20.4	-5.06
PARADEEP	6.6	4.72	DMART	-197.0	-4.71

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	18,676.35	20,630.24	-1,953.89
FII	13,337.33	11,982.00	1,355.33

Category	03/07/2026	02/07/2026	01/07/2026	30/06/2026	29/06/2026	25/06/2026
DII	-1,953.89	1784.40	3,159.24	6,842.34	2,801.45	5,747.75
FII	1,355.33	-311.82	-1,140.50	-2,556.75	-1,350.10	383.76

DERIVATIVE REPORT

- Nifty gained by 0.369% with Nifty future shaded 1.06 lakh shares in open interest and stock
- Stock future added 964.6 Lakh shares in open interest.
- Nifty PCR decreased to 1.06 from 1.28
- Total Nifty Calls added 638.0 lakh shares in open interest.
- Total Nifty Puts added 250.0 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for July. series is at 25000 and 24000 put.
- FII's bought net Rs. 1,355.33 Cr (provisional), while DIIs sold net Rs. 1,953.89 Cr in cash market
- FII bought net Rs. 5355.04 Cr in F&O
- Securities in Ban Period: - NIL

NIFTY TRACKER

	03.07.2026	02.07.2026	01.07.2026	30.06.2026
Spot	24270.85	24175.70	24005.85	23865.75
% Change in Spot	0.39%	0.71%	0.59%	-0.34%
Nifty(FUT) July.	24352.7	24265	24092.6	24009.1
Nifty(FUT) July. Vol.	49255	43674	37059	124254
Nifty(FUT) July. - OI	17053140	17226430	17896580	17938180
Nifty(FUT) Aug.	24445.2	24354	24195.3	0
Nifty(FUT) Aug. Vol.	4546	4075	2945	0
Nifty(FUT) Aug. - OI	1629810	1600235	1553435	0

TRADE STATISTICS FOR 03.07.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	11,11,422	76,37,736	-
Index Options	9,02,82,173	40,09,644	1.05
Stock Options	56,59,028	8,66,000	0.49
Index Futures	74,811	12,18,414	-
NSE F&O Total Turnover	9,71,27,434	1,37,31,794	1.01
NSE Cash Turnover		1,31,653.67	
BSE Cash Turnover		10,59,177.00	
Total Turnover	-	14922625	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	03/07/2026		02/07/2026		01/07/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	934	-775	472	-1170	-586	458
Index option	4399	29899	-6643	6069	-6738	79717
Stock Future	500	4738	1427	6691	-492	4327
Stock option	-476	6564	562	7451	-843	9572
Total	5357	40426	-4182	19041	-8659	94073

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	03/07/2026	02/07/2026	01/07/2026	30/06/2026	29/06/2026
Index Futures	291	-608	-15369	8905	2535
Index Options	4858	6746	-46303	9503	-599
Stock Futures	234375	120323	-983929	267916	346107
Stock Options	28543	23116	-183153	-20765	-16099
F&O Total	268067	149577	-1228754.31	265558.86	331944.31

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDFCFIRSTB	37,63,79,500	38,40,40,650	80.89	1.29%	2.04%
NHPC	9,98,64,550	10,49,10,250	80.43	1.31%	5.05%
TATASTEEL	20,50,78,500	20,97,70,000	191.07	1.58%	2.29%
HCLTECH	3,33,62,000	3,79,48,000	1132.8	6.02%	13.75%
ETERNAL	19,59,01,200	19,96,62,375	282.60	0.73%	1.92%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
BANKBARODA	11,14,71,750	12,16,30,275	254.1	-2.94%	9.11%
UNIONBANK	11,77,71,375	12,61,34,625	163.87	-6.21%	7.10%
BHEL	7,37,57,250	7,91,88,375	384.40	-4.62%	7.36%
PNB	30,54,16,000	30,84,72,000	105.6	-1.79%	1.00%
BANKINDIA	9,20,50,400	9,48,84,400	144.60	-0.87%	3.08%

NIFTY OPTION OPEN INTEREST STATISTICS

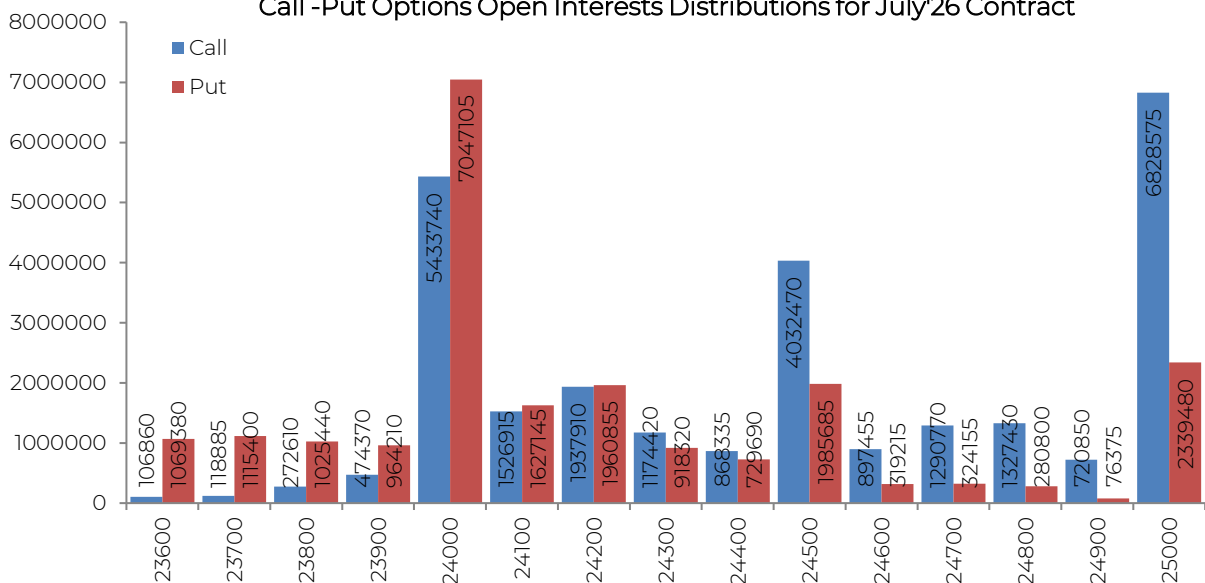
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
7-Jul-26	24300	CE	81.95	5789030	10872745	5935085
7-Jul-26	24350	CE	59.4	4979130	7546500	5449210
7-Jul-26	24400	CE	41.6	5257012	11374675	4942600
7-Jul-26	24300	PE	98.35	6888138	6239025	4887220
7-Jul-26	24200	PE	56.25	3519326	8311615	3489070
7-Jul-26	24800	CE	3.15	901872	7368530	3273530
7-Jul-26	25000	CE	1.9	1241586	12071475	2918175
7-Jul-26	25500	CE	0.85	469395	8751470	2829775
7-Jul-26	24500	CE	19.35	3824979	11410035	2818920
7-Jul-26	26000	CE	0.45	291985	5558345	2698605

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
7-Jul-26	22000	PE	0.55	247033	4292275	-2625935
7-Jul-26	24200	CE	139.65	1554018	4967365	-2599090
7-Jul-26	24100	CE	214.35	388639	1971125	-2532335
7-Jul-26	23400	PE	2.1	756685	3999580	-2175290
7-Jul-26	24150	CE	174.95	333910	1208675	-1836835
7-Jul-26	24050	PE	23.15	1104911	4706715	-1632410
7-Jul-26	24100	PE	31.1	2200726	7947745	-1465490
7-Jul-26	24050	CE	254.8	81988	1285310	-1083615
7-Jul-26	24000	CE	300	254199	4515810	-1030575
28-Jul-26	24000	CE	502.4	43974	5433740	-954005

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	0.35	10488	157552600	46245700
IDEA	28-Jul-26	15	CE	0.4	3705	504827925	28304100
IDEA	28-Jul-26	14	CE	0.8	1359	208278150	20298900
YESBANK	28-Jul-26	28	CE	0.2	3576	109783000	14088300
IDEA	28-Jul-26	17	CE	0.1	1308	126224850	14080575
IDEA	28-Jul-26	14	PE	0.45	1393	146094900	10864200
NTPC	28-Jul-26	367.5	CE	2.55	8235	9567000	9363000
IDEA	28-Jul-26	16	CE	0.2	2252	244301550	8862900
YESBANK	28-Jul-26	24	PE	0.7	1464	47272000	7899400
YESBANK	28-Jul-26	25	CE	0.8	4147	84032200	7401800

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
ASHOKLEY	28-Jul-26	165	CE	5.55	3774	8000000	-2925000
NHPC	28-Jul-26	80	CE	2.5	1744	11120000	-2752200
ABCAPITAL	28-Jul-26	430	CE	4	2487	2024300	-2489300
WIPRO	28-Jul-26	180	CE	3.15	8295	19590000	-2409000
IDEA	28-Jul-26	20	CE	0.05	57	60539325	-2001300
HDFCBANK	28-Jul-26	800	CE	22.35	19105	16575650	-1680250
YESBANK	28-Jul-26	21	PE	0.1	245	14243800	-1617200
UNIONBANK	28-Jul-26	180	CE	1.2	1610	2539950	-1566450
UNIONBANK	28-Jul-26	172.5	PE	11.1	68	566400	-1402725
UNIONBANK	28-Jul-26	180	PE	16.9	49	137175	-1318650

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