

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bullish candle with increase in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 22972
- Crucial moving average of 20/50 SMA are at 23615 and 23827
- 200 SMA trend deciding level exist at 24900

Indian Equity Market Performance:

Indian equity markets rose modestly on Thursday, with key benchmark indexes Sensex and Nifty extending gains for a fifth consecutive session, as easing geopolitical tensions offset pressure from a stronger dollar and higher U.S. Treasury yields.

Sectoral Front Performance:

On the sectoral front, Except IT, Energy and Metal, all other sectoral indices ended in the green with Media, Pharma, PSU Bank, Private Bank and Realty up 0.5% each.

Technical Analysis:

Nifty 50 extended its gains on Thursday, forming a bullish candle with a higher high-higher low pattern on the daily chart, signalling sustained positive momentum. The index closed above its 100-day EMA for the first time since February 23, while short- and medium-term moving averages continued to trend higher. Momentum indicators remained supportive, with the RSI rising to 62.43 and the MACD maintaining a bullish crossover above the zero line. The trend suggests further upside potential, although intermittent consolidation or profit-booking cannot be ruled out. Softer crude oil prices and a decline in the India VIX further boosted investor sentiment. On the upside, 24,200 remains the immediate resistance level, followed by the key hurdle at 24,500. On the downside, 24,000 is expected to provide initial support, while 23,800

Option Activity:

On the option front, maximum Put OI is at 24100 followed by 24000 strike, while maximum Call OI is at 25000 followed by 24500 strike. Call writing was seen at 24100 strike, followed by 24200 strike while Put writing was seen at 24100 strike, followed by 24000.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	51565	72.2	0.14
Nasdaq	26518	496.3	1.91
S&P 500	7501	80.5	1.08
FTSE 100	10400	-108.9	-1.04
DAX	25027	92.1	0.37
Hang Seng	23925	-387.4	-1.59
Nikkei	71324	270.5	0.38
Sensex	77410	254.4	0.33
Nifty	24168	82.3	0.34

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	4,202.2	43.70	1.03
Silver (\$/Oz)	65.54	1.27	1.90
Brent Crude (\$/bl)	79.50	0.35	0.44
Dollar Index	100.62	0.00	0.00
USD/INR	94.34	0.01	0.01
USD/YEN	161.17	-0.20	-0.12
EUR/USD	1.15	0.00	0.00

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76196	76856	77410	77846	78506
Nifty	23800	24000	24168	24300	24500
Nifty (Fut)	23824	24024	24192	24324	24524

Pivot Level	
Sensex	77285
Nifty	24131

ECONOMY NEWS

The recent hike in import duty on gold is yielding the desired outcome, with monthly gold imports declining considerably to 25-30 tonnes a month in May from the earlier average of 70-100 tonnes, a senior government official said on Thursday. This has also spurred higher recycling of old gold in the domestic market, the official added. (BS)

In a visit with immense strategic significance, Japanese Prime Minister Sanae Takaichi is scheduled to be in Guwahati, the capital of the northeastern state of Assam, along with a delegation comprising executives from 50 Japanese companies, in early July. (BS)

Despite global headwinds owing to geopolitics and disruption due to the war in West Asia, net direct-tax collection rose about 15 per cent to ₹5.21 trillion in the first two and a half months of FY27, as on June 17, according to the provisional data released by the Central Board of Direct Taxes (CBDT). (BS)

The tariff schedules released as part of the India-UK Comprehensive Economic and Trade Agreement (CETA) show that India will gradually lower import duties on a limited number of British cars and trucks while opening only the premium end of its green vehicle market to British automakers. In return, Indian manufacturers of electric, hybrid and hydrogen-powered passenger vehicles will gain duty-free access to the UK market across a wider range of vehicle price segments. (BS)

India's social security agreement with the United Kingdom (UK), known as Double Contribution Convention (DCC), is likely to facilitate annual savings of at least £500 million for Indian professionals from Indian companies based in the UK, according to two government officials. (BS)

India could resume imports of Iranian crude oil following the lifting of United States sanctions on exports of Iranian crude, petroleum products and related services, including banking transactions and transportation, under the 14-point agreement reached between the two countries. (BS)

The government is likely to review and gradually roll back emergency energy-security measures introduced in response to heightened tensions in West Asia once the global situation stabilises, a government official said. (BS)



CORPORATE NEWS

Reliance Industries will hold its annual general meeting (AGM) on Friday, June 19, and investors are expected to closely watch updates on the conglomerate's new energy ambitions, progress on the planned listing of Jio Platforms, and the company's capital allocation across businesses.

HCL Technologies has launched the AI Innovation Zone in Chennai to enable enterprises to innovate and operationalise Intel-based AI products and HCLTech AI solutions, accelerating the transition from experimentation to production-ready, cost-efficient AI deployments.

Amber Enterprises has entered into a manufacturing collaboration with Oppo Mobiles India. OPPO India is a licensed manufacturer of mobile phones for the OPPO, OnePlus, and Realme brands in India. Under this collaboration, Amber Group will manufacture mobile phones.

Wipro will acquire an additional 20 percent stake in Aggne Global IT Services, taking its holding to 80 per cent. The transaction is expected to be completed by June 30, 2026. Meanwhile, the company announced the completion of a large-scale, multi-year data centre migration programme for METRO, a leading international food wholesaler.

Tata Motors signed a MoU with the Ministry of Road Transport and Highways to participate in the GoI's scheme for the replacement of old trucks and buses in the Delhi-NCR region.

Lloyds Engineering Works has announced the acquisition of a controlling stake in structural steel infrastructure solutions providers Steel Infra Solutions Co. (SISCOL) at an equity valuation of around Rs 1,220 crore.

Kalyani Strategic Systems, the wholly owned defence subsidiary of Bharat Forge, has signed a strategic partnership with AM General, a leading provider of military vehicle and mobile defence capabilities, at the Eurosatory defence exposition.

Jubilant Pharmova has announced the completion of a USFDA inspection at its contract manufacturing facility, Jubilant HollisterStier LLC (JHS), USA. The inspection resulted in eight observations.

TruAlt Bioenergy has received approval for financial assistance of Rs 150 crore under the Government of India's PM JI-VAN Yojana (Jaiv Indhan-Vatavaran Anukool Fasal Awashesh Nivaran Yojana) for its proposed commercial-scale sustainable aviation fuel (SAF) project.

BULK DEAL

- Motisons Jewellers Ltd: Tiger Strategies Fund -I Sell 9049780 Shares @ Rs. 14.25
- Signoria Creation Limited: Holani Venture Capital Fund- I Buy 180000 Shares @ Rs. 76.2
- Pghh: Procter & Gamble Home Products Private Limited Buy 619683 Shares @ Rs. 8995.5
- Gpl: Vikasa India Eif I Fund - Share Class P Sell 150000 Shares @ Rs. 44

INSIDER TRADE

ACQUISITION

- * Aeroflex Enterprises Ltd- $\text{\$}$: A Flex Invest Private Limited, Promoter Group, Acquisition 100000 shares on 17-Jun-26
- * Gokul Refoils & Solvent Ltd: Bhikhiben Balvantsinh Rajput, Promoter, Acquisition 18500 shares
- * Linc Ltd- $\text{\$}$: JYOTI MAHESH GOENKA, Promoter Group, Acquisition 100000 shares on 16-Jun-26
- * Zydus Wellness Ltd- $\text{\$}$: Samar Babubhai Patel, Promoter Group, Acquisition 1000 shares on 16-Jun-26
- * Anand Rathi Share And Stock Brokers Ltd: Asha Biyani, Promoter Group, Acquisition 40000 shares
- * Gamco Ltd: GOLDEN GOENKA CREDIT PRIVATE LIMITED, Promoter, Acquisition 10000 shares on 16-Jun-26
- * Alembic Pharmaceuticals Ltd: Nirayu Private Limited, Promoter Group, Acquisition 24832 shares on 16-Jun-26
- * Stel Holdings Ltd: SOFREAL MERCANTRADE PRIVATE LTD, Promoter Group, Acquisition 3619 shares on 15-Jun-26
- * Gandhar Oil Refinery (India) Ltd: Ramesh Babulal Parekh, Promoter & Director, Acquisition 50000 shares on 16-Jun-26

DISPOSAL

- * Mtar Technologies Ltd: Kavitha Reddy Gangapatnam, Promoter, Disposal 20000 shares on 16-Jun-26
- * Linc Ltd- $\text{\$}$: BIMLA DEVI JALAN, Promoter Group, Disposal 100000 shares on 16-Jun-26

PLEDGE

- * Pennar Industries Ltd- $\text{\$}$: Aditya Narsing Rao, Promoter, Pledge 3173000 shares on 17-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
BATAINDIA	790.0	16.4%	IFCI	82.5	-8.4%
KPRMILL	1188.9	14.0%	IDBI	84.5	-6.5%
WELSPUNLIV	161.7	10.2%	ELECON	534.2	-4.4%
REDINGTON	271.6	9.1%	CHENNPETRO	1122.0	-3.7%
NIACL	180.0	8.8%	JSL	706.3	-3.0%
OLECTRA	1451.0	7.1%	EMMVEE	333.8	-2.8%
MAXHEALTH	1094.5	6.7%	ASAHIINDIA	860.0	-2.7%
FIVESTAR	517.6	6.6%	SUMICHEM	452.0	-2.6%
ABSLAMC	1169.0	6.5%	NUVOCO	312.0	-2.6%
NYKAA	298.0	6.1%	INFY	1128.0	-2.6%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	16,163.18	12,646.37	3,516.81
FII	14,611.83	15,637.03	-1,025.20

Category	18/06/2026	17/06/2026	16/06/2026	15/06/2026	12/06/2026	11/06/2026
DII	3,516.81	1,561.40	0.06	3,189.26	5,341.29	4,224.51
FII	-1,025.20	101.59	-749.18	200.05	-1,082.18	-1,987.09

DERIVATIVE REPORT

- Nifty gained by 0.34% with Nifty future shaded 2.21 lakh shares in open interest and stock
- Stock future added 761.9 Lakh shares in open interest.
- Nifty PCR increased to 1.12 from 1.11
- Total Nifty Calls added 262.2 lakh shares in open interest.
- Total Nifty Puts added 340.5 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 24000 put.
- FII's sold net Rs. 1,025.20 Cr (provisional), while DIIs bought net Rs. 3,516.81 Cr in cash market
- FII bought net Rs. 4887.35 Cr in F&O
- Securities in Ban Period: - KAYNES

NIFTY TRACKER

	18.06.2026	17.06.2026	16.06.2026	15.06.2026
Spot	24168.00	24085.70	23989.15	23853.90
% Change in Spot	0.34%	0.40%	0.57%	0.98%
Nifty(FUT) June.	24192.5	24094	24001	23916.6
Nifty(FUT) June. Vol.	44358	38564	50265	72076
Nifty(FUT) June. - OI	16511170	16807115	17180800	17817930
Nifty(FUT) July.	24278.6	24182.3	24087.9	24009.9
Nifty(FUT) July. Vol.	7198	5298	3935	9893
Nifty(FUT) July. - OI	2043210	1984060	1913925	1910350

TRADE STATISTICS FOR 18.06.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	11,75,360	75,77,003	-
Index Options	4,92,27,962	26,16,960	0.99
Stock Options	78,20,820	7,29,593	0.5
Index Futures	83,660	13,63,213	-
NSE F&O Total Turnover	5,83,07,802	1,22,86,769	0.91
NSE Cash Turnover		1,33,872.05	
BSE Cash Turnover		11,46,017.00	
Total Turnover	-	13566658	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	18/06/2026		17/06/2026		16/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	508	52	748	-335	1783	-2284
Index option	5846	32555	-5722	35853	-38907	-110893
Stock Future	-1735	1357	-408	2354	-1727	1787
Stock option	269	4650	-608	5975	-32	3743
Total	4888	38614	-5990	43847	-38883	-107646

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	18/06/2026	17/06/2026	16/06/2026	15/06/2026	12/06/2026
Index Futures	59	-941	-1736	-497	885
Index Options	6325	5054	2512	6421	13615
Stock Futures	155444	-769087	313854	193808	211256
Stock Options	11039	13724	9550	17466	2982
F&O Total	172867	-751250	324180.38	217198.76	228737.93

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
NHPC	13,29,72,800	14,28,73,600	76.14	1.91%	7.45%
HDFCBANK	35,52,38,950	36,49,72,300	789.9	1.84%	2.74%
NYKAA	4,62,65,625	5,21,68,750	299.65	6.09%	12.76%
TMPV	6,06,16,800	6,64,14,400	362.2	1.07%	9.56%
ADANIPOWER	11,65,92,650	12,14,70,350	232.68	5.06%	4.18%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
WIPRO	28,72,02,000	29,49,39,000	182.43	-0.99%	2.69%
INFY	9,00,36,800	9,65,95,600	1125.7	-2.80%	7.28%
SUZLON	36,72,36,275	37,12,34,350	58.61	-1.53%	1.09%
RELIANCE	11,51,31,000	11,75,22,500	1333.3	-0.10%	2.08%
IRFC	6,26,96,000	6,50,03,750	100.01	-0.45%	3.68%

NIFTY OPTION OPEN INTEREST STATISTICS

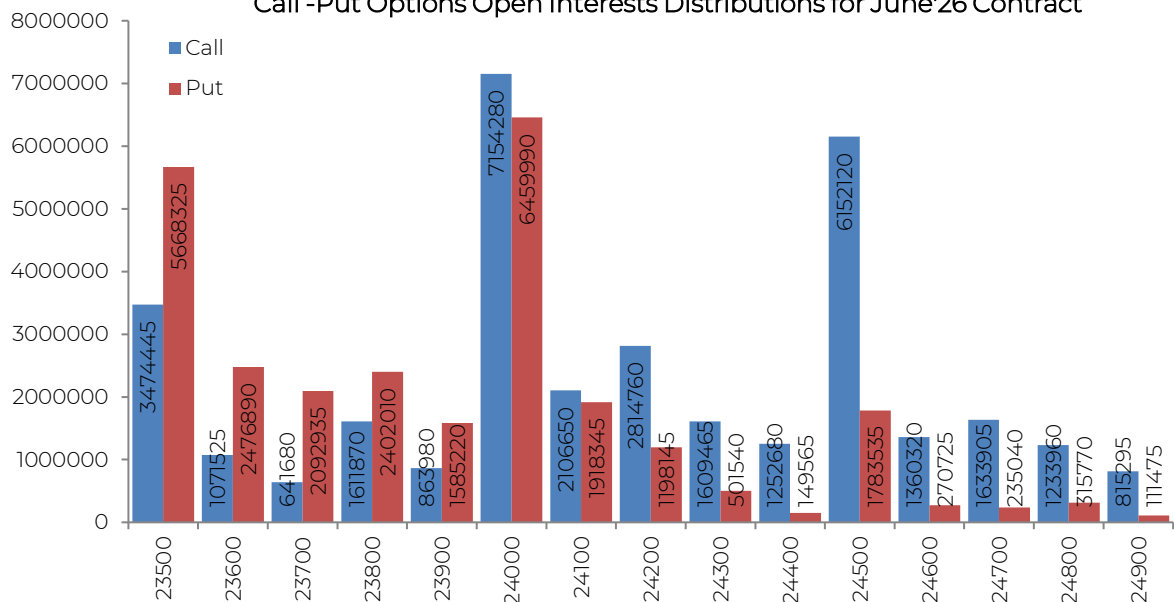
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	24100	PE	82.35	2703286	6765200	3482375
23-Jun-26	24500	CE	21.25	1008625	9636900	3127150
23-Jun-26	23400	PE	4.7	475868	6567535	2706470
23-Jun-26	24400	CE	36.15	755196	5194280	2379390
23-Jun-26	23500	PE	5.65	746115	7701720	2319590
23-Jun-26	24200	PE	126	836278	3221140	2275390
23-Jun-26	24200	CE	100.9	1905664	6082960	2104960
23-Jun-26	24150	PE	102.7	926786	2512510	1935440
23-Jun-26	25000	CE	2.5	849165	9583405	1902225
23-Jun-26	23800	PE	18.2	968598	5602610	1708915

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	24000	CE	217.15	1541041	4635995	-1794195
23-Jun-26	24100	CE	149.65	3318824	4166305	-1433965
23-Jun-26	24050	CE	180.8	1322342	1552785	-1427855
23-Jun-26	23900	CE	295.6	337005	1548365	-688025
23-Jun-26	21200	PE	0.65	70629	3446170	-531375
28-Jul-26	22200	PE	27	14244	288535	-417235
23-Jun-26	22200	PE	1.3	58234	742950	-333970
23-Jun-26	23800	CE	383.35	134689	790985	-289770
23-Jun-26	23250	PE	3.4	156849	1021345	-289445
30-Jun-26	22800	PE	7.35	30381	817440	-270465

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



STOCK OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
YESBANK	30-Jun-26	28	CE	0.15	3774	31131100	13248600
YESBANK	30-Jun-26	25	PE	0.4	3539	46992100	11569200
IDEA	30-Jun-26	13	CE	2.1	311	174470475	11364525
YESBANK	28-Jul-26	26	PE	1.4	436	11289300	8770200
IDEA	28-Jul-26	18	CE	0.3	332	65256675	8219625
IDEA	28-Jul-26	16	CE	0.65	342	66257325	7147500
IDEA	28-Jul-26	15	CE	1	390	120864225	6218325
INOXWIND	30-Jun-26	100	CE	0.45	3656	20406100	6138275
YESBANK	30-Jun-26	27	CE	0.25	4291	46432300	5007100
SUZLON	30-Jun-26	60	CE	1.05	4573	55278125	4142475

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	30-Jun-26	15	CE	0.55	3264	407407500	-44028600
IDEA	30-Jun-26	16	CE	0.25	2198	301981875	-14295000
IDEA	30-Jun-26	14	CE	1.25	1219	291618000	-13508775
YESBANK	30-Jun-26	25	CE	0.95	4531	54704900	-12564400
IDEA	30-Jun-26	12	PE	0.05	470	163606275	-9935025
IDEA	30-Jun-26	14	PE	0.15	1831	213209925	-6289800
IDEA	30-Jun-26	11	PE	0.05	342	35951925	-6289800
CANBK	30-Jun-26	135	CE	3.1	3417	6439500	-5244750
YESBANK	30-Jun-26	24	CE	1.65	1069	46898800	-5193700
IDEA	30-Jun-26	18	CE	0.05	766	90844725	-4574400

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