

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bullish candle with increase in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 22966
- Crucial moving average of 20/50 SMA are at 23633 and 23845
- 200 SMA trend deciding level exist at 24897

Indian Equity Market Performance:

Indian equity markets fell notably on Friday, with benchmark indexes Sensex and Nifty snapping their five-day winning streak, as doubts emerged over U.S.-Iran talks aimed at ending the Middle East conflict and Accenture cut its FY26 guidance, sending IT stocks tumbling.

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 ended with a small-bodied bullish candle featuring a lower shadow on the daily chart after a gap-down opening. On the weekly chart, the index formed a Doji candle, signalling indecision among market participants and a lack of clear dominance by either bulls or bears. Momentum indicators stayed supportive, with the RSI at 58 and above its 9-day moving average, while the MACD remained above both the zero and signal lines. India VIX also stayed at relatively subdued levels despite Friday's uptick, suggesting that the broader trend remains positive amid near-term consolidation. The 23,850-23,800 zone is expected to provide immediate support, coinciding with the 50-day EMA and the 50% Fibonacci retracement of the recent rally. A break below 23,800 could accelerate selling pressure towards 23,500. On the upside, the 24,150-24,200 zone, aligned with the 100-day EMA, is likely to act as an immediate hurdle. A sustained move above 24,200 could revive bullish momentum and pave the way for a rally towards 24,500 in the near term.

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	10363	-36.4	-0.35
DAX	24986	-41.0	-0.16
Hang Seng	23543	-382.3	-1.60
Nikkei	72790	1539.4	2.16
Sensex	76803	-607.1	-0.78
Nifty	24013	-154.9	-0.64

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	4,210.60	35.30	0.83
Silver (\$/Oz)	66.53	0.28	0.42
Brent Crude (\$/bl)	79.47	1.10	1.37
Dollar Index	100.62	0.00	0.00
USD/INR	94.45	0.13	0.13
USD/YEN	161.56	0.25	0.15
EUR/USD	1.15	0.00	-0.03

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	75109	76099	76802	77254	77749
Nifty	23500	23800	24013	24150	24300
Nifty (Fut)	23544	23844	24057	24194	24344

Pivot Level	
Sensex	76725
Nifty	23987

ECONOMY NEWS

Applications generated under the National Apprenticeship Promotion Scheme (NAPS) plunged to a six-year low in 2025 despite employers continuing to offer apprenticeship opportunities, according to data from the scheme's public dashboard. (BS)

India may press for an automatic review mechanism in its proposed interim trade deal with the United States (US), mirroring a sunset clause introduced by the European Parliament in its trade agreement with Washington, people aware of the negotiations said. (BS)

India, led by Apple Inc, exported over \$2.43 billion worth of smartphones to the US in April this year, a staggering growth of 47.24 per cent year-on-year (Y-o-Y). (BS)

India will host the 11th BRICS Energy Ministers' Meeting on June 25-26, 2026, in Gurugram, Haryana, under its BRICS Chairship 2026. The meeting seeks to advance cooperation on energy security, sustainability and innovation. (BS)

India continues to be the largest market for the Asian Development Bank's private sector operations, with the multilateral lender expecting to provide about USD 1 billion in direct financing this year to support projects aligned with the country's development objectives. (BS)

US Trade Representative Jamieson Greer and Commerce and Industry Minister Piyush Goyal will hold two-day talks this week on the first phase of the bilateral trade agreement. (BS)

Indian exporters will have to upgrade product standards and align their goods with British regulatory requirements to take full advantage of the India-UK free trade agreement, which will come into effect from July 15, according to experts. (BS)

The country's merchandise exports rose by about 15 per cent during April-June 14 this year despite global economic uncertainties, Commerce and Industry Minister Piyush Goyal said on Sunday. The Commerce Ministry will formally release the export and import data for June on July 15. (BS)

India is seeking a competitive advantage over rival nations before rolling out a much-delayed trade agreement with the US, after both countries agreed on the initial framework. (BS)



CORPORATE NEWS

Reliance Industries subsidiary, Jio Platforms, has filed a Draft Red Herring Prospectus (DRHP) with SEBI to raise funds through an IPO. The IPO comprises an entirely fresh issue of 27 crore equity shares. The proceeds from the IPO will be utilized for the repayment of debt amounting to Rs 27,500 crore, and general corporate purposes.

Tata Motors Commercial Vehicle has secured over 3,400 electric commercial vehicle (eCV) orders across various segments, marking a significant inflection point in the mainstream adoption of electric mobility for both freight and passenger transportation in India.

Sun Pharmaceutical Industries has agreed to acquire 100% of the outstanding shares of Innovcare Lifesciences for Rs 271.2 crore. Innovcare Lifesciences is engaged in the marketing, distribution, and sale of pharmaceutical drugs, nutraceuticals, and cosmeceutical products.

Rail Vikas Nigam has received a Letter of Award (LoA) for a contract worth Rs 2,977 crore from NMDC for the setting up of buffer stockpiles and a blending yard with a handling capacity of 10 MTPA at Vizag, Andhra Pradesh.

Power Mech Projects has received an order worth Rs 1,008.9 crore from JSW Thermal Energy for civil and structural works in the BTG area of a 2x800 MW thermal power project at Salboni, West Bengal.

Bharat Forge has signed a Rs 425 crore contract with the Ministry of Defence (MoD), India, for the supply of gas turbine generators to the Indian Navy for onboard power generation on Kolkata-class ships.

Kirloskar Oil Engines has announced a significant order from HyperNext, a next-generation digital infrastructure company focused on delivering hyperscale-ready, AI-enabled data center solutions. The order comprises 192 MW and 96 units of Kirloskar Oil Engines' 2,500 kVA Optiprime Dual Core Power Systems.

Goodluck India's subsidiary, Goodluck Defence and Aerospace, has received an order worth Rs 255 crore from an undisclosed entity for the supply of 155 mm long-range empty shells in ready-to-fill condition.

BULK DEAL

- Pine Labs Limited: Actis Pine Labs Investment Holdings Limited Sell 9828235 Shares @ Rs. 154.25
- Sustainable Energy Infra: Larsen & Toubro Limited Sell 2050000 Shares @ Rs. 123
- Allcargo Logistics Ltd: Vanguard Total International Stock Index Fund Sell 8933722 Shares @ Rs. 8.66
- Allcargo Logistics Ltd: Vanguard Emerging Markets Stock Index Fund A Series Of Vieif Sell 8461398 Shares @ Rs. 8.66
- Aqylon Nexus Limited: Pine Oak Global Fund Buy 1400000 Shares @ Rs. 48.4
- Iris Regtech Solution Ltd: Tunga India Long Term Equity Fund Sell 177627 Shares @ Rs. 276.08
- Ravindra Energy Ltd: Nova Global Opportunities Fund Pcc - Touchstone Buy 900000 Shares @ Rs. 36.37
- Ravindra Energy Ltd: M7 Global Fund Pcc - Aerion Buy 900000 Shares @ Rs. 36.37
- Ravindra Energy Ltd: M7 Global Fund Pcc - Cell Dewcap Fund Buy 900000 Shares @ Rs. 36.37
- Magson Retail And Dist L: Albula Investment Fund Ltd Sell 150000 Shares @ Rs. 160
- Munish Forge Limited: Rgsl Investment Lvf 1 Sell 201600 Shares @ Rs. 66.08
- Kmew: Sbi Funds Management Limited Buy 400036 Shares @ Rs. 1963.17
- Jtlind: Absl Umbrella Ucits Fund Plc India Frontline Equity Fund Buy 2000000 Shares @ Rs. 72



INSIDER TRADE

ACQUISITION

- * Stel Holdings Ltd: SOFREAL MERCANTRADE PRIVATE LTD, Promoter Group, Acquisition 15465 shares
- * Plastiblends India Ltd- $\$$: VARUN SATYANARAYAN KABRA, Promoter, Acquisition 343000 shares
- * Alembic Pharmaceuticals Ltd: Nirayu Private Limited, Promoter Group, Acquisition 3278 shares on 18-Jun-26
- * M.K. Exim (India) Ltd: MURLI WADHUMAL DIALANI, Director, Acquisition 55500 shares on 18-Jun-26
- * T T Ltd- $\$$: SANJAY KUMAR JAIN, Promoter Group, Acquisition 54300 shares on 17-Jun-26
- * Procter & Gamble Hygiene And Health Care Ltd: Procter & Gamble Home Products Private Limited, Promoter Group, Acquisition 619683 shares on 18-Jun-26
- * Visaka Industries Ltd: VIGILANCE SECURITY SERVICES PRIVATE LIMITED, Promoter Group, Acquisition 43 shares on 18-Jun-26

DISPOSAL

- * Plastiblends India Ltd- $\$$: KOLSITE CORPORATION LLP, Promoter Group, Disposal 343000 shares on 17-Jun-26
- * Itcons E-Solutions Ltd: Gaurav Mittal, Promoter & Director, Disposal 200000 shares on 19-Jun-26
- * General Insurance Corporation Of India: The President of India acting through and represented by the Ministry of Finance Government of India, Promoter, Disposal 87720505 shares on 16-Jun-26
- * Procter & Gamble Hygiene And Health Care Ltd: Temple Trees Impex and Investment Private Limited, Promoter Group, Disposal 619683 shares on 18-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
NIACL	200.9	12.4%	FACT	883.9	-7.3%
BERGEPAIN	556.0	10.1%	INFY	1054.2	-6.5%
TATACAP	380.0	10.0%	BATAINDIA	746.0	-5.6%
TARIL	357.0	9.9%	BALRAMCHIN	530.7	-4.2%
ITCHOTELS	174.2	8.1%	SONATSOFTW	296.3	-4.1%
PIRAMALFIN	2150.0	7.6%	LTM	3840.0	-4.0%
THELEELA	492.2	7.6%	USHAMART	472.0	-3.8%
POONAWALLA	433.8	7.2%	AWL	185.3	-3.7%
CAPLIPOINT	2528.0	7.1%	ICICIPRULI	503.3	-3.6%
AADHARHFC	518.1	6.5%	KAYNES	3268.0	-3.5%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	18,020.49	19,180.13	-1,159.64
FII	31,442.87	26,583.80	4,859.07

Category	19/06/2026	18/06/2026	17/06/2026	16/06/2026	15/06/2026	12/06/2026
DII	-1,159.64	3,516.81	1,561.40	0.06	3,189.26	5,341.29
FII	4,859.07	-1,025.20	101.59	-749.18	200.05	-1,082.18

DERIVATIVE REPORT

- Nifty shaded by 0.64% with Nifty future added 4.21 lakh shares in open interest and stock
- Stock future added 1319.1 Lakh shares in open interest.
- Nifty PCR decreased to 0.91 from 1.12
- Total Nifty Calls added 467.4 lakh shares in open interest.
- Total Nifty Puts shaded 58.9 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 24000 put.
- FII's bought net Rs. 4,859.07 Cr (provisional), while DIIs sold net Rs. 1,159.64 Cr in cash market
- FII sold net Rs. 2061.42 Cr in F&O
- Securities in Ban Period: - KAYNES

NIFTY TRACKER

	19.06.2026	18.06.2026	17.06.2026	16.06.2026
Spot	24013.10	24168.00	24085.70	23989.15
% Change in Spot	-0.64%	0.34%	0.40%	0.57%
Nifty(FUT) June.	24056.9	24192.5	24094	24001
Nifty(FUT) June. Vol.	56868	44358	38564	50265
Nifty(FUT) June. - OI	16483480	16511170	16807115	17180800
Nifty(FUT) July.	24142.7	24278.6	24182.3	24087.9
Nifty(FUT) July. Vol.	15687	7198	5298	3935
Nifty(FUT) July. - OI	2417025	2043210	1984060	1913925

TRADE STATISTICS FOR 19.06.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	15,20,500	95,94,322	-
Index Options	9,38,54,615	46,41,512	1.04
Stock Options	91,15,504	8,16,313	0.49
Index Futures	1,06,668	17,19,686	-
NSE F&O Total Turnover	10,45,97,287	1,67,71,833	0.97
NSE Cash Turnover		1,59,981.95	
BSE Cash Turnover		10,87,902.00	
Total Turnover	-	18019717	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	19/06/2026		18/06/2026		17/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-792	157	508	52	748	-335
Index option	1353	35554	5846	32555	-5722	35853
Stock Future	-3346	4191	-1735	1357	-408	2354
Stock option	723	5311	269	4650	-608	5975
Total	-2062	45212	4888	38614	-5990	43847

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	19/06/2026	18/06/2026	17/06/2026	16/06/2026	15/06/2026
Index Futures	926	59	-941	-1736	-497
Index Options	5679	6325	5054	2512	6421
Stock Futures	107704	155444	-769087	313854	193808
Stock Options	14540	11039	13724	9550	17466
F&O Total	128849	172867	-751249.72	324180.38	217198.76

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
MOTHERSON	15,14,80,650	16,39,15,950	145.2	0.37%	8.21%
SUZLON	36,97,54,250	37,88,69,500	59.4	1.26%	2.47%
BHARTIARTL	4,96,83,100	5,63,29,775	1,906.60	1.54%	13.38%
YESBANK	1,13,72,33,700	1,14,28,31,700	25.53	0.08%	0.49%
ETERNAL	21,94,21,275	22,38,88,125	264.50	2.10%	2.04%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
INFY	9,38,60,800	10,40,35,600	1053	-6.42%	10.84%
WIPRO	29,20,74,000	29,91,45,000	179.58	-1.51%	2.42%
KOTAKBANK	16,43,44,000	17,14,10,000	400.30	-0.99%	4.30%
RELIANCE	11,38,36,500	11,90,90,000	1316	-1.14%	4.61%
IDEA	5,55,52,51,425	5,56,01,83,200	14.94	-0.93%	0.09%

NIFTY OPTION OPEN INTEREST STATISTICS

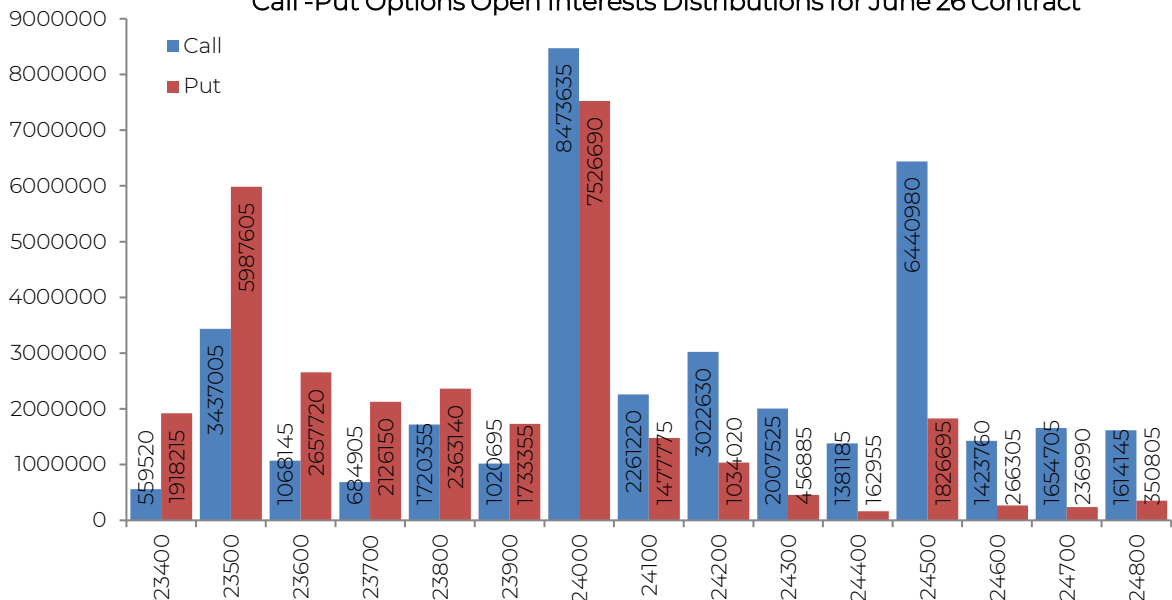
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	24000	CE	118	7011109	9056385	4420390
23-Jun-26	24100	CE	71.45	3203522	6707090	2540785
23-Jun-26	24050	CE	93.9	2728845	4001010	2448225
23-Jun-26	25500	CE	0.85	578387	8018205	2098915
23-Jun-26	24200	CE	40.45	2659227	8178625	2095665
23-Jun-26	25000	CE	1.75	1261939	11670750	2087345
23-Jun-26	24300	CE	22.2	1688706	7005180	1875835
23-Jun-26	23500	PE	5.55	1989369	9523800	1822080
23-Jun-26	24350	CE	16.5	874111	3840200	1813045
23-Jun-26	23950	CE	144.4	3635845	2410720	1810055

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	24100	PE	139.1	1502961	3249220	-3515980
23-Jun-26	24050	PE	107.7	1348929	2092740	-2133365
23-Jun-26	23400	PE	3.95	1059364	4453085	-2114450
23-Jun-26	24150	PE	171.4	324498	734305	-1778205
23-Jun-26	24200	PE	207.55	476332	1571570	-1649570
30-Jun-26	23300	PE	20.85	105285	2239835	-1212510
23-Jun-26	22500	PE	1	228744	3427710	-936260
23-Jun-26	21500	PE	0.55	44974	1109420	-846235
23-Jun-26	22900	PE	1.55	304397	2358395	-691275
23-Jun-26	23300	PE	2.9	965899	4630535	-675935

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
IDEA	30-Jun-26	16	CE	0.2	2691	327284025	25302150
IDEA	30-Jun-26	13	PE	0.05	670	188479575	10506825
IDEA	30-Jun-26	17	CE	0.1	1892	196699200	6146850
SUZLON	28-Jul-26	60	CE	3.1	1230	20104100	5803900
SUZLON	28-Jul-26	64	CE	1.6	880	16027400	5600700
IDEA	28-Jul-26	16	CE	0.6	491	71260575	5003250
IDFCFIRSTB	30-Jun-26	79	CE	1.3	2891	7568400	4646775
IDEA	28-Jul-26	14	PE	0.45	244	38882400	4074075
SUZLON	30-Jun-26	61	CE	0.9	5316	10631450	3736350
YESBANK	30-Jun-26	26	PE	0.95	872	14337100	3047800

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	30-Jun-26	15	CE	0.45	3695	392683650	-14723850
YESBANK	30-Jun-26	27	CE	0.2	2442	37382200	-9050100
IDFCFIRSTB	30-Jun-26	74	PE	0.2	1466	8486625	-6909875
YESBANK	30-Jun-26	22	PE	0.05	679	44068700	-4851600
SUZLON	30-Jun-26	60	CE	1.2	13520	50585125	-4693000
SUZLON	30-Jun-26	59	CE	1.6	5779	12228875	-4160525
IDEA	30-Jun-26	14	PE	0.15	1461	209064375	-4145550
YESBANK	30-Jun-26	23	CE	2.5	335	21427900	-4136300
YESBANK	30-Jun-26	26	CE	0.4	3482	63070800	-3856400
SUZLON	30-Jun-26	58	CE	2.15	2428	11082700	-3104600

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