

TECHNICAL BUILDUP

OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 22964
- Crucial moving average of 20/50 SMA are at 23639 and 23847
- 200 SMA trend deciding level exist at 24891

Indian Equity Market Performance:

Indian equity markets ended notably lower on Tuesday, weighed down by weakness in global markets, weak Indian PMI data and a weaker rupee. A major decline in South Korean semiconductor giants SK Hynix and Samsung Electronics (down over 12%) triggered a global sell-off.

Sectoral Front Performance:

On the sectoral front, Except pharma and healthcare, all other sectoral indices ended in the red with Information Technology, Metal, Telecom, PSU Bank, Realty down 1-3 percent.

Technical Analysis:

Nifty 50 came under pressure and formed a long bearish candle on the daily chart, reflecting weakness amid heightened volatility. The index remained below its 50-day and 100-day EMAs and slipped beneath the 23.6 percent Fibonacci retracement level of the April rally, though it continued to hold above the 20-day EMA and the Bollinger Bands' midline at 23,640. The RSI eased to 52 but stayed in positive territory, while the MACD retained its bullish crossover. The broader trend remains constructive, but momentum has weakened, suggesting continued consolidation. A sustained move above 24,200 is needed to revive bullish momentum, while a break below key support levels of 23,800 which coincides with the 50-day EMA and the 50% Fibonacci retracement level could trigger stronger selling pressure towards 23,500

Option Activity:

On the option front, maximum Put OI is at 24000 followed by 23500 strike, while maximum Call OI is at 25000 followed by 24000 strike. Call writing was seen at 26500 strike, followed by 22000 strike while Put writing was seen at 26000 strike, followed by 25500.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	51667	-45.9	-0.09
Nasdaq	25587	-579.6	-2.21
S&P 500	7365	-107.3	-1.44
FTSE 100	10429	-9.0	-0.09
DAX	24894	-246.1	-0.98
Hang Seng	23308	-28.3	-0.12
Nikkei	69242	-546.4	-0.78
Sensex	76201	-893.4	-1.16
Nifty	23824	-278.8	-1.16

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	4,101.40	48.00	1.16
Silver (\$/Oz)	62.10	0.42	0.67
Brent Crude (\$/bl)	76.71	0.37	0.48
Dollar Index	101.19	0.02	0.02
USD/INR	94.95	0.22	0.23
USD/YEN	161.56	0.05	0.03
EUR/USD	1.14	0.00	-0.07

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	75131	75956	76200	76781	77111
Nifty	23500	23750	23824	24000	24100
Nifty (Fut)	23528	23778	23852	24028	24128

Pivot Level	
Sensex	76493
Nifty	23915

ECONOMY NEWS

India and the United States opened high-level trade talks on Tuesday aimed at salvaging and recalibrating a proposed bilateral trade agreement after changes in US tariff policy upended a framework negotiated earlier this year. (BS)

The central government, despite severe opposition to the Galathea Bay International Container Transshipment Terminal (ICTT) project, will go ahead with the project according to the planned timelines, Shipping Minister Sarbananda Sonowal said. (BS)

The Ministry of Commerce has proposed government-to-government engagement with the European Union (EU) to address concerns raised by Indian industry over the bloc's Waste Shipment Regulation (WSR), which is scheduled to come into effect in 2027. (BS)

The World Trade Organization's dispute settlement body on Tuesday agreed to set up a panel in a case filed by China against India over its measures for the solar cells, modules, and IT goods, an official said. (BS)

India has initiated an anti-dumping probe against imports of electrical steel, used in transformers, from China, Japan, Korea and Russia, a commerce ministry notification said. The investigation followed a complaint in this regard by JSW JFE Electrical steel Nashik Pvt Ltd to the Directorate General of Trade Remedies (DGTR). (BS)

HSBC's flash India Composite Purchasing Managers' Output Index (PMI), compiled by S&P Global, fell to 57.4, down from a final reading of 59.3 in May. The June print was the lowest since March, when it stood at 57. However, the index remained above 50 the mark that separates growth from contraction for the 59th consecutive month. (BS)

NITI Aayog has recommended that the government develop a standardised "model pharmaceutical (pharma) chapter" to serve as a template for all future free trade agreement (FTA) negotiations, arguing that non-tariff barriers, rather than tariffs, are now the binding constraints on India's \$35.8 billion pharma exports. (BS)

The composition of bank deposits has undergone a shift from FY19 to FY26, with the share of the non-household segment, including financial corporations and non-financial corporations, rising to 26.3 per cent in FY26 from 20.5 per cent in FY19, according to the Crisil report. (BS)



CORPORATE NEWS

Infosys announced an expanded multi-year collaboration with Nasdaq-listed GlobalFoundries, a leading semiconductor manufacturer, to deliver AI-led managed services across GF's enterprise IT landscape. The engagement is designed to elevate GF's IT operations by transitioning from externally supported operations to a true managed services model driven by AI, automation, and continuous optimisation.

Tech Mahindra announced the expansion of its partnership with Telefónica Germany to build a next-generation private cloud platform to accelerate cloud-native transformation and to provide Platform-as-a-Service (Paas) for technology and enterprise business growth.

NLC India has signed an MoU with Indian Oil Corporation (IOCL) to form a joint venture for developing large-scale renewable energy projects in Tamil Nadu. The proposed JV will focus on energy storage projects, along with opportunities in green fuels, supporting India's clean energy transition and net-zero ambitions.

Wipro announced the expansion of its partnership with Palo Alto Networks to offer AI-driven Managed Detection and Response (MDR) services. The partnership brings together Palo Alto Networks' Cortex XSIAM platform and CyberShieldSM, Wipro's managed security services capabilities, in a focused offering for modern security operations.

The power ministry has mandated that the 4,150 MW Mundra plant of Tata Power be run at full capacity for three more months till September to avoid any electricity shortage amid the estimated peak demand of 270 GW during summer.

Tata Motors PV has lined up capex of up to ₹40,000 crore in the next five years. Notably, the firm is aiming for 20% share in the domestic market by nearly doubling its volumes to over 12 lakh units annually by FY31.

Honasa Consumer will acquire 58 per cent stake in nutraceuticals firm Fluence Pharma at an enterprise value of ₹135 crore. The deal will mark Honasa Consumer's entry into the fast-growing health and wellness supplements market.

Rashi Peripherals has entered into definitive agreements to acquire a 67 percent stake in VDA Infosolutions for Rs 368.50 crore, subject to the fulfilment of customary closing conditions.

BULK DEAL

- Vedanta Limited: Twin Star Holdings Limited Sell 65072990 Shares @ Rs. 291.36
- Craftsman Automation Ltd: Hdfc Mutual Fund Buy 183784 Shares @ Rs. 9250
- Rajshree Polypack Ltd: The Golden Bird Investment Trust - I Buy 399119 Shares @ Rs. 21.46
- Delhivery: Nexus Ventures Iii Limited Sell 4323860 Shares @ Rs. 481
- Gpl: Upsurge Opportunities Fund 1 Sell 111000 Shares @ Rs. 47.95



INSIDER TRADE

ACQUISITION

- * Time Technoplast Ltd: Time Securities Services Private Limited, Promoter, Acquisition 1000000 shares on 23-Jun-26
- * Paradeep Phosphates Ltd: ZUARI MAROC PHOSPHATES PRIVATE LIMITED, Promoter, Acquisition 290546 shares
- * Crestchem Ltd: DIPAK NARENDRAPRASAD PATEL, Promoter & Director, Acquisition 1000 shares on 22-Jun-26
- * Confidence Petroleum India Ltd: CONFIDENCE LPG BOTTLING PRIVATE LIMITED, Promoter Group, Acquisition 2800000 shares
- * Sicagen India Ltd: Twinshield Consultants Private Limited, Promoter Group, Acquisition 1545500 shares on 19-Jun-26

DISPOSAL

- * Time Technoplast Ltd: Promoter Group, Disposal 1000000 shares
- * Roto Pumps Ltd: Shalini Gupta, Promoter Group, Disposal 1000 shares on 18-Jun-26
- * Sicagen India Ltd: South India Travels Pvt. Ltd., Promoter Group, Disposal 1545500 shares on 19-Jun-26
- * Jsl Industries Ltd: SAATYAKI ANANT AMIN, Promoter Group, Disposal 1000 shares on 22-Jun-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
COHANCE	460.0	13.5%	NIACL	194.8	-8.2%
MEESHO	185.5	7.7%	VEDL	282.1	-7.8%
PPLPHARMA	169.1	6.6%	NATIONALUM	355.5	-5.9%
NEULANLAB	18101.0	5.1%	AEGISVOPAK	232.5	-5.6%
ATHERENERG	1007.0	4.8%	HINDZINC	546.0	-4.7%
GLAND	2290.0	4.7%	ECLERX	1383.3	-4.6%
KIRLOSENG	2501.1	4.7%	JINDALSTEL	1082.0	-4.4%
SCHNEIDER	1448.5	3.8%	HFCL	201.2	-3.9%
ZFCVINDIA	16162.0	3.7%	ASHOKLEY	151.0	-3.9%
APARINDS	16695.0	3.2%	SBFC	89.7	-3.8%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	16,863.04	16,182.83	680.21
FII	15,396.07	15,378.21	17.86

Category	23/06/2026	22/06/2026	19/06/2026	18/06/2026	17/06/2026	16/06/2026
DII	680.21	1,035.72	-1,159.64	3,516.81	1,561.40	0.06
FII	17.86	-635.91	4,859.07	-1,025.20	101.59	-749.18

DERIVATIVE REPORT

- Nifty declined by 1.16% with Nifty future added 7.19 lakh shares in open interest and stock
- Stock future added 762.4 Lakh shares in open interest.
- Nifty PCR decreased to 0.71 from 0.96
- Total Nifty Calls added 1360.7 lakh shares in open interest.
- Total Nifty Puts added 231.2 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. 17.86 Cr (provisional), while DIIs bought net Rs. 680.21 Cr in cash market
- FII bought net Rs. 10859.74 Cr in F&O
- Securities in Ban Period: - KAYNES

NIFTY TRACKER

	23.06.2026	22.06.2026	19.06.2026	18.06.2026
Spot	23824.10	24102.90	24013.10	24168.00
% Change in Spot	-1.16%	0.37%	-0.64%	0.34%
Nifty(FUT) June.	23852.5	24123.8	24056.9	24192.5
Nifty(FUT) June. Vol.	57105	32256	56868	44358
Nifty(FUT) June. - OI	15876575	16090685	16483480	16511170
Nifty(FUT) July.	23950.4	24220.8	24142.7	24278.6
Nifty(FUT) July. Vol.	21340	6925	15687	7198
Nifty(FUT) July. - OI	3323450	2507700	2417025	2043210

TRADE STATISTICS FOR 23.06.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	19,23,955	1,22,39,795	-
Index Options	44,88,32,343	72,97,633	1
Stock Options	92,17,289	6,46,819	0.5
Index Futures	1,21,651	19,66,169	-
NSE F&O Total Turnover	46,00,95,238	2,21,50,416	0.99
NSE Cash Turnover		1,31,784.41	
BSE Cash Turnover		9,98,362.00	
Total Turnover	-	23280562	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	23/06/2026		22/06/2026		19/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-937	677	598	-428	-792	157
Index option	12480	-84178	3341	34160	1353	35554
Stock Future	-1081	-2885	-1426	3045	-3346	4191
Stock option	398	2114	-233	4432	723	5311
Total	10860	-84271	2280	41210	-2062	45212

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	23/06/2026	22/06/2026	19/06/2026	18/06/2026	17/06/2026
Index Futures	1259	-1670	926	59	-941
Index Options	-3990	5664	5679	6325	5054
Stock Futures	392747	188776	107704	155444	-769087
Stock Options	-2396	8837	14540	11039	13724
F&O Total	387620	201608	128848.71	172866.66	-751249.72

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
SHRIRAMFIN	62,80,725	94,52,850	994.35	0.01%	50.51%
AXISBANK	1,11,23,125	1,39,77,500	1367.3	0.04%	25.66%
POWERGRID	1,50,67,000	1,76,20,600	293.70	0.55%	16.95%
BIOCON	39,85,000	62,57,500	424.3	0.13%	57.03%
BPCL	74,95,125	96,43,925	311.35	0.23%	28.67%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	5,35,56,21,750	5,38,28,53,725	14.46	-2.63%	0.51%
VEDL	4,56,32,000	5,54,79,450	280.85	-8.37%	21.58%
TATASTEEL	18,83,25,500	19,64,98,500	192.94	-3.03%	4.34%
HDFCBANK	31,28,83,450	31,97,59,000	773.3	-1.69%	2.20%
ASHOKLEY	16,86,10,000	17,52,95,000	150.80	-4.27%	3.96%

NIFTY OPTION OPEN INTEREST STATISTICS

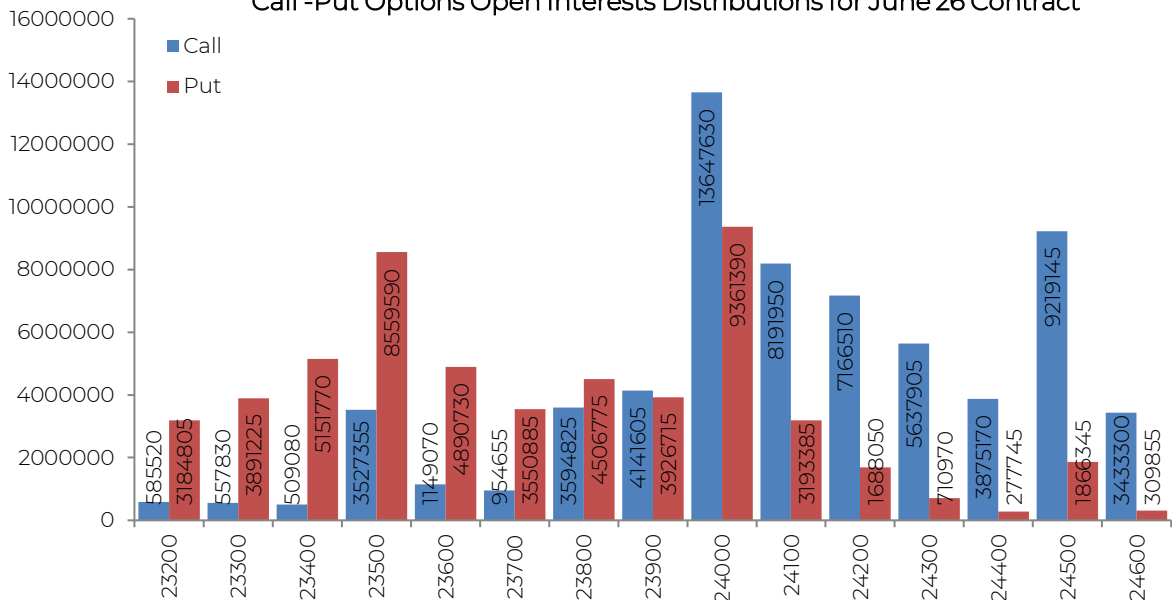
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	23850	CE	23824.1	13539249	24620570	24390795
23-Jun-26	23900	CE	23824.1	23476957	17811755	16393260
23-Jun-26	23800	PE	23824.1	26906590	24136060	15974075
23-Jun-26	23950	CE	23824.1	24589925	14957670	14121965
23-Jun-26	24000	CE	23824.1	23924148	14238835	9111830
23-Jun-26	24050	CE	23824.1	15899785	9440275	7041905
23-Jun-26	23800	CE	23824.1	5115439	7365800	6829680
30-Jun-26	24000	CE	99.7	734383	13647630	6047605
30-Jun-26	25000	CE	4.15	473624	16958715	5068295
30-Jun-26	24100	CE	68.5	655725	8191950	4870580

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
23-Jun-26	24000	PE	23824.1	16336179	3595670	-9549865
23-Jun-26	24100	PE	23824.1	15194886	2891395	-7940920
23-Jun-26	24050	PE	23824.1	12231547	1860625	-4912765
23-Jun-26	24200	CE	23824.1	13219283	9584770	-3762460
23-Jun-26	24300	CE	23824.1	7206749	6923215	-3633370
23-Jun-26	24150	PE	23824.1	5702107	898820	-3368950
23-Jun-26	23950	PE	23824.1	18198017	2437110	-2906540
23-Jun-26	21200	PE	23824.1	168913	871260	-1873430
23-Jun-26	24200	PE	23824.1	3229739	1253525	-1732705
23-Jun-26	25100	CE	23824.1	626297	3374540	-1661205

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	28-Jul-26	15	CE	0.8	1216	179044875	24158550
IDEA	28-Jul-26	16	CE	0.5	1088	94847325	12579600
VEDL	30-Jun-26	290	CE	3.85	38486	10253400	9640450
IDEA	28-Jul-26	15	PE	1.15	335	47745300	6504225
YESBANK	30-Jun-26	28	CE	0.05	1917	42918000	6499900
VEDL	30-Jun-26	300	CE	2.05	39636	9844000	6214600
IDEA	28-Jul-26	14	PE	0.65	390	46458750	6075375
IDEA	28-Jul-26	13	PE	0.3	403	49246275	5432100
IDEA	28-Jul-26	14	CE	1.25	328	35165700	5289150
YESBANK	28-Jul-26	26	CE	0.7	648	32966000	5224800

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	30-Jun-26	13	PE	0.05	2556	148668000	-36452250
IDEA	30-Jun-26	15	PE	0.65	1429	152813550	-29519175
IDEA	30-Jun-26	14	CE	0.6	1503	260812275	-22943475
IDEA	30-Jun-26	13	CE	1.5	641	144236550	-20799225
IDEA	30-Jun-26	17	CE	0.05	1750	168252150	-18297600
IDEA	30-Jun-26	15	CE	0.15	6481	394041675	-14437950
IDEA	30-Jun-26	14	PE	0.1	1986	187478925	-12936975
YESBANK	30-Jun-26	24	PE	0.15	2379	43477800	-12222300
YESBANK	30-Jun-26	23	PE	0.05	2553	55855600	-9423300
SUZLON	30-Jun-26	60	CE	0.5	5609	45774800	-8158600

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