

TECHNICAL BUILDUP

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23675
- Crucial moving average of 20/50 SMA are at 23675 and 23846
- 200 SMA trend deciding level exist at 24882

OUTLOOK OF THE DAY

Indian Equity Market Performance:

Indian equity markets ended a choppy session lower on Monday as trading resumed after a long holiday weekend.

Sectoral Front Performance:

On the sectoral front, Auto index shed 2%, while PSU Bank, Media, IT, Oil & Gas down 1-1.5%. On the other hand, Metal, Pharma, Healthcare up 1% each.

Technical Analysis:

Nifty 50 ended on a weak note, forming a bearish candle on the daily chart with small upper and lower shadows, reflecting selling pressure and a failed attempt to break above a key resistance zone. The index once again struggled to sustain gains above the falling trendline drawn from the April 21 and June 18 highs and stayed below the 100-day EMA. However, it continued to hold above its short- and medium-term moving averages, suggesting that the broader bullish structure remains intact. Momentum indicators signalled consolidation rather than a reversal. The Relative Strength Index (RSI) remained steady at 54 while continuing to maintain a positive crossover, indicating that buying interest has not completely faded despite the recent pullback. The 24,100-24,200 zone continues to be the immediate hurdle. A decisive close above this resistance could trigger fresh buying and pave the way for an advance towards 24,500-24,600, with the next upside target placed around 24,800. On the downside, immediate support is seen in the 23,800-23,750 zone, where the 20-day EMA coincides with the 38.2% Fibonacci retracement of the recent rally. A sustained break below this support area could weaken near-term sentiment and increase the likelihood of a deeper corrective move.

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 24100 strike. Call writing was seen at 24000 strike, followed by 24100 strike while Put writing was seen at 23900 strike, followed by 23950.

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	52183	306.6	0.59
Nasdaq	25820	522.5	2.07
S&P 500	7440	86.4	1.18
FTSE 100	10484	-23.8	-0.23
DAX	24627	-44.3	-0.18
Hang Seng	22768	-259.2	-1.13
Nikkei	70098	629.9	0.91
Sensex	76728	-372.1	-0.48
Nifty	23946	-109.8	-0.46

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	3,983.0	55.90	1.38
Silver (\$/Oz)	57.88	0.76	1.29
Brent Crude (\$/bl)	72.57	0.58	0.79
Dollar Index	101.04	0.16	0.16
USD/INR	94.75	0.21	0.22
USD/YEN	162.12	0.18	0.11
EUR/USD	1.14	0.00	-0.17

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76081	76576	76728	77566	78061
Nifty	23750	23900	23946	24200	24350
Nifty (Fut)	23777	23927	23973	24227	24377

Pivot Level	
Sensex	76868
Nifty	23997

ECONOMY NEWS

The US-India trade deal is in its "final steps", with only the last one per cent of negotiations left to be concluded, US Ambassador to India Sergio Gor said on Tuesday, expressing confidence that the deal would soon be sealed after nearly 18 months of talks. (BS)

India has reached an inflection point where the next leap in governance would come from connecting administrative records that currently sit in isolated departmental silos into a fully harmonised, citizen-centric data ecosystem, Saurabh Garg, secretary, Ministry of Statistics and Programme Implementation (Mospi), said on Monday. (BS)

India's industrial output growth rose to a five-month high of 5.1 per cent in May, from 4.9 per cent in April, driven by strong growth in the electricity and gas supply sector, according to data released by the National Statistics Office (NSO) on Monday. (BS)

The Union Cabinet has approved an additional ₹30,000 crore investment in the National Investment and Infrastructure Fund (NIIF), taking the Centre's total commitment to India's sovereign-anchored fund to ₹60,000 crore, the finance ministry said on Monday. (BS)

The government has removed restrictions on the retail sale of petrol and diesel for commercial users from July 1, amid improvement in the procurement of energy supplies. (BS)

India and Saudi Arabia have signed a Memorandum of Understanding to boost cooperation on water resource management, according to an official statement on Monday. The agreement was signed at the inaugural edition of Saudi Arabia's national water conference, Saudi Water Week, being hosted in Jeddah. (BS)

India has asked the European Union for relief from planned curbs on metal scrap exports as steel and aluminium makers warn the move could tighten supplies, raise costs and undermine gains from a trade pact, industry and government officials said. (BS)

India is moving ahead with a major expansion of its strategic petroleum reserve (SPR) network, with five projects planned across Chandikhol in Odisha, Bina in Madhya Pradesh, Bikaner in Rajasthan, and Mangaluru and Padur in Karnataka, according to people familiar with the matter. (BS)



CORPORATE NEWS

HDFC Bank board has approved the appointment of Rajiv Kumar as an additional director (Independent Director) of HDFC Bank for a period of four years, effective June 30. He has also been appointed as the Part-time Chairman of the bank, subject to RBI approval. It also approved the appointment of Puneet Sharma as the Chief Financial Officer-Designate of HDFC Bank.

Tech Mahindra announced a partnership with Perplexity to embed AI-powered intelligence across its sales organisation. Through the deployment of Perplexity Enterprise Pro, Tech Mahindra aims to empower its sales teams with faster access to trusted, source-backed insights, enabling them to better understand customer priorities, engage more effectively, and deliver greater business value.

RITES has signed a Memorandum of Understanding (MoU) with Container Corporation of India (CONCOR) to collaborate on project management consultancy (PMC) services, covering projects from concept to commissioning for the development and improvement of CONCOR's terminals and establishments.

Sterling and Wilson Renewable Energy, in a 50:50 joint venture with Hassan Allam Construction (one of the leading contractors in Egypt and the MENA region), has secured an order worth approximately \$560 million for the West Minya Solar Power Project in Minya Governorate, Egypt.

SJVN has signed Power Purchase Agreements (PPAs) with Gujarat Urja Vikas Nigam (GUVNL) for the supply of power from its upcoming hydroelectric projects in Himachal Pradesh—66 MW Dhaulasidh HEP, 210 MW Luhri Stage-I HEP, and 382 MW Sunni Dam HEP.

Mastek has announced its partnership with Yanbu Cement Co, a leading Saudi Arabian cement manufacturers, to modernize and digitally transform YCC's production, and dispatch operations through Industrial IoT, intelligent automation, and integrated enterprise platforms.

Godrej Properties has acquired a nearly 47-acre land parcel through an outright purchase off Old Mahabalipuram Road (OMR) in South Chennai.

Puravankara has partnered with a landowner to develop a 6.4-acre housing project in Bengaluru with an estimated revenue potential of Rs 1,000 crore. It has entered into a joint development agreement (JDA) for a 6.4-acre land parcel in Sarjapur, Bengaluru.

BULK DEAL

- Multi Commodity Exchange: Uti Mutual Fund Buy 1465941 Shares @ Rs. 2899.23
- Pondy Oxides & Chem Ltd: Ici Prudential Mutual Fund Buy 472000 Shares @ Rs. 1270
- Goodluck India Limited: Sageone - Flagship Growth Oe Fund Buy 250000 Shares @ Rs. 1420
- Ramco Systems Limited: Oregon Public Employees Retirement System Buy 190773 Shares @ Rs. 772.4
- Madhusudan Masala Limited: Compact Structure Fund Sell 94000 Shares @ Rs. 215.91
- Ema Partners India Ltd: Negen Undiscovered Value Fund Sell 115000 Shares @ Rs. 89.98
- Indotech: lifl Asset Management Limited Buy 115300 Shares @ Rs. 2985
- Indotech: lifl Asset Management Limited Buy 84700 Shares @ Rs. 2985
- Cgfi: Mgo High Conviction Fund Incorporated Vcc Sub-Fund Sell 1818168 Shares @ Rs. 29.9
- Harikanta: Radiant Global Fund-Class B Participating Shares Buy 561600 Shares @ Rs. 80
- Harikanta: Nova Global Opportunities Fund Pcc - Touchstone Sell 469200 Shares @ Rs. 80
- Cgfi: Minerva Ventures Fund Sell 1200000 Shares @ Rs. 29.85
- Cgfi: Dp Global Wealth Management Llp Buy 898917 Shares @ Rs. 29.86
- Recode: Mint Focused Growth Fund Pcc- Cell 1 Sell 120000 Shares @ Rs. 200.25
- Harikanta: Zeal Global Opportunities Fund Sell 180000 Shares @ Rs. 80
- Mtpl: Pine Oak Global Fund Buy 353487 Shares @ Rs. 15.19



INSIDER TRADE

ACQUISITION

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
ATHERENERG	1085.0	8.6%	PERSISTENT	4292.0	-11.3%
ACUTAAS	3581.0	8.5%	NETWEB	4482.0	-9.3%
SCHNEIDER	1432.0	7.2%	ASTRAL	1370.0	-7.9%
HONASA	443.9	6.3%	SUPREMEIND	3193.0	-6.7%
THERMAX	5105.0	5.7%	LATENTVIEW	280.0	-6.0%
ABDL	657.6	5.7%	LTTS	3124.5	-6.0%
MAHABANK	93.7	5.6%	ASAHIINDIA	850.0	-5.4%
ACMESOLAR	377.1	5.6%	BRIGADE	500.0	-4.8%
LLOYDSME	1817.0	5.6%	CANFINHOME	843.9	-4.8%
FINCABLES	1178.2	5.5%	TIMKEN	3491.0	-4.5%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	55,273.85	52,472.40	2,801.45
FII	24,754.26	26,104.36	-1,350.10

Category	29/06/2026	25/06/2026	24/06/2026	23/06/2026	22/06/2026	19/06/2026
DII	2,801.45	5,747.75	3,637.26	680.21	1,035.72	-1,159.64
FII	-1,350.10	383.76	-1,843.40	17.86	-635.91	4,859.07

DERIVATIVE REPORT

- Nifty declined by 0.46% with Nifty future added 7.41 lakh shares in open interest and stock
- Stock future shaded 647.2 Lakh shares in open interest.
- Nifty PCR decreased to 0.85 from 1.06
- Total Nifty Calls added 957.0 lakh shares in open interest.
- Total Nifty Puts added 315.6 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 23500 put.
- FII's sold net Rs. 1,350.10 Cr (provisional), while DIIs bought net Rs. 2,801.45 Cr in cash market
- FII bought net Rs. 5224.22 Cr in F&O
- Securities in Ban Period: - NIL

NIFTY TRACKER

	29.06.2026	25.06.2026	24.06.2026	23.06.2026
Spot	23946.25	24056.00	24021.65	23824.10
% Change in Spot	-0.46%	0.14%	0.83%	-1.16%
Nifty(FUT) June.	23972.9	24102.3	24051.8	23852.5
Nifty(FUT) June. Vol.	75442	87672	89318	57105
Nifty(FUT) June. - OI	6888245	9944155	13134745	15876575
Nifty(FUT) July.	24037.7	24170.5	24125.2	23950.4
Nifty(FUT) July. Vol.	80436	72399	59648	21340
Nifty(FUT) July. - OI	12749815	9165650	6129305	3323450

TRADE STATISTICS FOR 29.06.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	55,26,930	3,65,32,906	-
Index Options	16,66,05,765	65,23,784	1.14
Stock Options	1,24,99,762	7,38,812	0.62
Index Futures	2,35,681	38,17,597	-
NSE F&O Total Turnover	18,48,68,138	4,76,13,099	1.09
NSE Cash Turnover		1,83,491.87	
BSE Cash Turnover		10,04,971.00	
Total Turnover	-	48801562	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	29/06/2026		25/06/2026		24/06/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-1800	4541	811	762	-46	2637
Index option	6467	84409	4286	30590	-14478	36163
Stock Future	2343	-5425	188	4984	1093	4009
Stock option	-1786	-7207	779	4854	755	-1488
Total	5224	76318	6064	41189	-12676	41322

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	29/06/2026	25/06/2026	24/06/2026	23/06/2026	22/06/2026
Index Futures	2535	499	1836	1259	-1670
Index Options	-599	1638	474	-3990	5664
Stock Futures	346107	99564	-728701	392747	188776
Stock Options	-16099	-2664	2238	-2396	8837
F&O Total	331944	99037	-724152.54	387620.21	201607.51

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	55,61,92,400	58,27,82,900	25.17	1.04%	4.78%
ETERNAL	8,50,15,650	9,19,34,175	259.3	1.57%	8.14%
POWERGRID	2,96,00,100	3,59,02,400	286.50	0.76%	21.29%
BEL	5,16,43,425	5,58,05,850	411.25	0.98%	8.06%
NHPC	5,88,09,600	6,23,55,200	81.40	2.60%	6.03%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
ONGC	4,01,51,250	4,76,10,000	232.3	-0.41%	18.58%
ICICIBANK	5,25,20,300	5,82,70,800	1386.7	-0.15%	10.95%
BHARTIARTL	2,39,25,750	2,90,36,750	1,850.90	-0.19%	21.36%
TATAPOWER	2,92,20,400	3,41,08,350	385.6	-0.81%	16.73%
ABCAPITAL	1,60,61,100	1,93,96,700	389.80	-0.32%	20.77%

NIFTY OPTION OPEN INTEREST STATISTICS

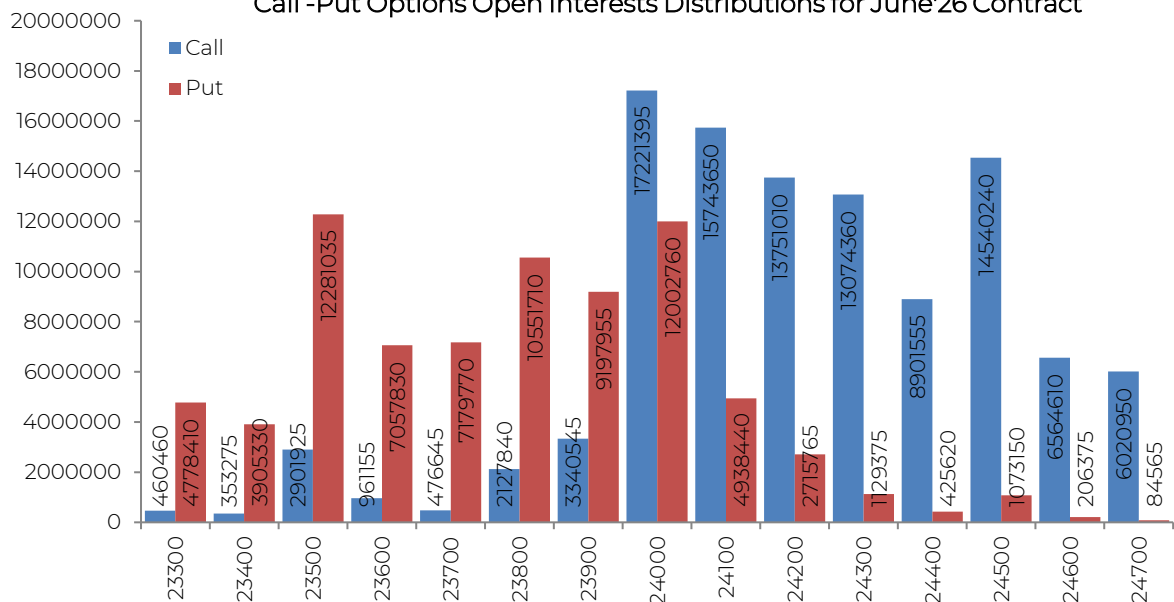
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
30-Jun-26	24000	CE	64.3	7777816	17221395	8591375
30-Jun-26	24100	CE	32.35	9499236	15743650	7917715
30-Jun-26	25000	CE	1.35	1192802	18492485	5591650
30-Jun-26	24300	CE	7.65	3310324	13074360	4454060
30-Jun-26	24050	CE	45.55	5715477	6710275	4418180
30-Jun-26	23950	CE	87.65	3725852	5097820	4204525
30-Jun-26	24150	CE	22.65	4873012	7080060	3536455
30-Jun-26	24200	CE	15.85	5473108	13751010	3457870
30-Jun-26	23800	PE	24.25	5142951	10551710	3229005
30-Jun-26	24500	CE	3.15	1954540	14540240	2720640

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
30-Jun-26	22500	PE	0.8	294313	4852510	-2282930
30-Jun-26	24200	PE	247.95	1530686	2715765	-2143700
30-Jun-26	22000	PE	0.7	130965	4251000	-1990570
30-Jun-26	26000	CE	0.65	172302	5492825	-1378815
30-Jun-26	24100	PE	164.4	6077398	4938440	-1168050
30-Jun-26	24150	PE	206.1	1726529	823225	-1111240
30-Jun-26	21500	PE	0.65	60559	1777490	-1020110
30-Jun-26	25700	CE	0.8	84629	619320	-934115
30-Jun-26	25200	CE	0.95	468312	5190900	-630110
30-Jun-26	22600	PE	0.85	88603	730015	-563745

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	0.55	2916	310272975	45958425
IDEA	28-Jul-26	14	CE	1	1852	125796000	38024700
IDEA	28-Jul-26	13	CE	1.7	539	39096825	17011050
IDEA	28-Jul-26	15	PE	1	543	117219000	11793375
IDEA	28-Jul-26	16	CE	0.3	1837	162105300	10435350
IDEA	28-Jul-26	14	PE	0.5	1010	75406125	10292400
ONGC	30-Jun-26	225	PE	2.2	11774	10161000	9713250
IDEA	28-Jul-26	17	CE	0.15	888	61754400	8219625
IDEA	28-Jul-26	13	PE	0.2	800	82124775	7862250
IDEA	28-Jul-26	18	CE	0.1	667	95490600	7719300

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	30-Jun-26	15	CE	0.05	7208	271462050	-92488650
IDEA	30-Jun-26	14	CE	0.4	5020	168966900	-62612100
IDEA	30-Jun-26	16	CE	0.05	1761	232722600	-42742050
IDEA	30-Jun-26	14	PE	0.05	4584	135873975	-28518525
YESBANK	30-Jun-26	25	CE	0.3	3219	29140700	-21645600
YESBANK	30-Jun-26	25	PE	0.15	3732	22112100	-16762900
IDEA	30-Jun-26	15	PE	0.65	747	79122825	-14223525
IDEA	30-Jun-26	17	CE	0.05	633	116075400	-12651075
IDEA	30-Jun-26	13	PE	0.05	1181	119363250	-12436650
IDEA	30-Jun-26	12	PE	0.05	317	137160525	-9863550

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