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Daily Updates

Market Commentary

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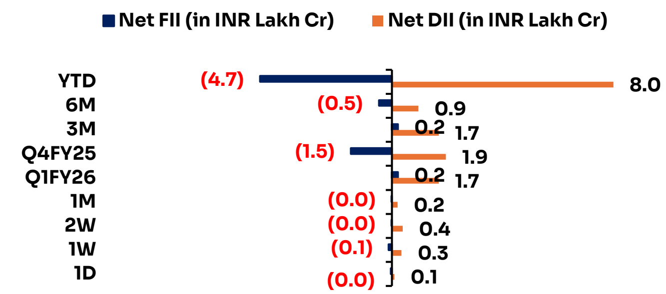
Overnight global action:
On 14th July 2026, US market delivered a positive performance with S&P500 up by +28.54 pts (0.38%), Dow Jones up by +10.02 pts (0.02%) and Nasdaq up by +322.19 pts (1.1%). Gift Nifty declined by -16.81015 pts (-0.07%) indicating Indian markets will open negatively.
Advance-Decline ratio on NSE was 1772:1555 and on BSE was 2246:2166 which showed balance in the overall markets.

Fund Flow	Buy	Sell	Net
FII/FPI	12,763	13,503	-740
DII	20,421	17,493	2,928



Index Options Data Analysis:
Sensex max call OI is at 77000 max put OI is at 77500 with PCR of 1.48
Nifty max call OI is at 24000 max put OI is at 24500 with PCR of 1.62
Bank Nifty max call OI and put OI both are at 58000 with PCR of0.97

Securities in Ban for F&O Trade:
KAYNES

Sector Performance:

NIFTY OIL & GAS index declined by -0.66% driven by Aegis Vopak Terminals Ltd. (-7.5%) and Aegis Logistics Ltd. (-7.47%)

NIFTY PRIVATE BANK index declined by -0.85% driven by Bandhan Bank Ltd. (-2.5%) and IDFC First Bank Ltd. (-2.48%)

NIFTY FMCG index declined by -0.58% driven by Emami Ltd. (-1.5%) and ITC Ltd. (-1.47%)

NIFTY REALTY index declined by -1.97% driven by Lodha Developers Ltd. (-4.3%) and Anant Raj Ltd. (-4.29%)

Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,031	-0.1%	-8.5%	21.8
Sensex 30	77,055	-0.7%	-9.6%	20.1
Nifty 50	24,052	-0.7%	-8.0%	21.8
India VIX	14	3.9%	45.6%	
Nifty Bank	57,462	-1.2%	-3.6%	16.9
Nifty Next 50	71,852	-0.4%	3.6%	71.9
Nifty 500	23,199	-0.6%	-2.8%	21.8
Nifty Mid 100	62,766	-0.4%	3.8%	32.3
Nifty Small 25(	17,975	-1.1%	7.7%	30.3
USD/INR	96	0.0%	0.7%	
India 10Y	6.8%			
India 2Y	6.2%			
India 1Y	5.8%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,544	0.4%	10.2%	32.7
Dow Jones	52,509	0.0%	9.3%	25.4
Nasdaq 100	29,586	1.1%	17.2%	48.6
FTSE 100	10,529	0.3%	6.0%	16.6
CAC 40	8,367	0.0%	2.7%	24.5
DAX	25,147	0.1%	2.7%	26.2
Nikkei 225	68,160	0.6%	35.9%	36.4
Hang Seng	24,341	0.5%	-5.0%	11.8
Shanghai Com	3,967	1.4%	0.0%	18.0
KOSPI	7,299	6.5%	73.0%	36.1
S&P/ASX 200	8,850	0.5%	1.6%	23.4

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Daily Updates

Stocks in the News

HFCL LTD. (CMP: 212, MARKET CAP: 32518 Cr., SECTOR: TELECOM-INFRASTRUCTURE)

The company announced securing a massive contract worth ₹2,666.09 crore from Rail Vikas Nigam Limited (RVNL) for the implementation of the prestigious BharatNet Phase-III project in Uttar Pradesh (West). The order encompasses a execution period of two years followed by a comprehensive ten-year operations and maintenance contract. This development substantially reinforces HFCL's robust order book visibility and underscores its technical capability in executing complex regional telecom infrastructure projects. Share Market Buzz

THOMAS COOK INDIA LTD. (CMP: 102, MARKET CAP: 4814 Cr., SECTOR: TRAVEL SERVICES)

The travel and financial services player launched an industry-first cross-border rewards program aimed at boosting international retail spend via its forex cards. The value proposition offers cardholders a 10% reward-back (capped at $10 per day) distributed as Amazon vouchers on a minimum global retail spend of $25 across premium international chains like Starbucks and McDonald's. The tactical initiative is designed to drive volumes, improve stickiness, and catalyze higher transactional frequency in overseas markets. Share Market Buzz

ATUL LTD. (CMP: 6051, MARKET CAP: 17815 Cr., SECTOR: CHEMICALS)

The specialty chemicals and materials manufacturer posted robust absolute profits for the most recent period, though public markets exhibited a muted reaction owing to underlying earnings-quality concerns flagged by independent research analysts. Financial watchdogs point towards specific line items affecting the sustainable quality of the earnings mix, even as the company maintains a stable, low-leverage balance sheet. Shares closed relatively flat on the exchanges as institutional investors weigh long-term volume trends against immediate margin expansion. Simply Wall Street

ICICI PRUDENTIAL ASSET MANAGEMENT CO LTD. (CMP: 3166, MARKET CAP: 156472 Cr., SECTOR: FINANCIAL SERVICES)

Shares fell about 2.3% on Tuesday despite the company posting a 23% rise in quarterly profit, with the recently listed AMC facing sell-on-news pressure amid a weak broader tape. Profit momentum remains healthy; valuation and flow trends into equity schemes are the monitorables for the stock's next leg.
Trading Economics TRADING ECONOMICS

Sectoral Inde	CMP	1D	YTD	P/E x
Nifty Auto	26,548	-1.6%	-5.8%	21.9
Nifty IT	28,725	-1.0%	-24.2%	22.4
Nifty Fin Ser	26,537	-1.1%	-3.9%	17.3
Nifty Pharma	25,907	1.0%	14.0%	42.6
Nifty Services	31,054	-0.7%	-7.7%	34.2
Nifty Cons Du	38,657	0.0%	5.2%	52.4
Nifty PSE	9,923	-0.4%	0.7%	10.4
Nifty FMCG	48,525	-0.6%	-12.5%	33.4
Nifty Pvt Bank	27,916	-0.9%	-2.8%	10.4
Nifty PSU Banl	8,308	-1.8%	-2.6%	13.6
Nifty Cons	11,611	-0.5%	-5.5%	41.0
Nifty Realty	919	-2.0%	4.6%	39.9
Nifty Infra	9,351	-0.3%	-2.8%	21.7
Nifty Energy	39,203	0.0%	11.0%	12.4
Nifty Health	16,441	0.9%	12.3%	39.3
Nifty India Mfg	15,851	-0.3%	2.9%	29.5
Nifty Metal	12,678	0.6%	13.5%	22.7
Nifty Oil & Gas	11,102	-0.7%	-9.2%	17.0

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
RADICO	13.5	0.5
ALKEM	8.9	0.6
DIVISLAB	8.4	3.4
TORNTPHARM	7.5	0.3
UNIONBANK	6.6	0.1
Short		
TATAELXSI	16.3	-4.4
HCLTECH	13.9	-4.5
IREDA	13.0	-3.3
LTF	11.1	-3.2
GVT&D	7.9	-0.3
Long Unwinding		
PHOENIXLTD	-4.7	-1.1
RBLBANK	-4.2	-0.8
BAJAJFINSV	-3.6	-2.1
GRASIM	-3.5	-0.9
TITAN	-3.5	-0.6
Short Covering		
MCX	-6.6	4.0
MARICO	-5.5	0.2
SUPREMEIND	-4.2	3.1
TCS	-3.9	5.5

TATA ELXSI LTD. (CMP: 3700, MARKET CAP: 23053 Cr., SECTOR: IT - SOFTWARE)

Q1FY27 consolidated revenue rose 14.46% YoY (+2.75% QoQ) to ₹1,021.11 crore — crossing ₹1,000 crore for the first time — with net profit up 18.17% YoY at ₹170.60 crore, though EBIT margin narrowed to 18.97% on higher operating costs led by Transportation and Media & Communication, with a new JSW Motors partnership to set up the JNEXT NextGen Technology Centre in Pune and AI product launches AnaTel and ViTel). Revenue milestone positive; margin compression remains the bear point.
Sahi Research | ScanX SahiScanX

Commodities	CMP	1D	YTD
Gold ($)	4,061	-0.2%	0.3%
Silver ($)	59.3	0.3%	0.3%
Brent Oil ($)	85.4	0.0%	0.6%

Currency	CMP	1D	YTD
USD/INR	96.2	0.0%	0.6%
EUR/INR	110.0	0.1%	0.1%
GBP/INR	128.9	0.1%	0.0%
JPY/INR	0.6	0.1%	0.1%
EUR/USD	1.1	0.1%	0.1%

Securities Lending & Borrowing Scheme (SLBS)

Company	Under.Ltp	Fut.Ltp	Spread (%)
BDL	1,276.50	1,248.00	2.23
IREDA	122.10	120.22	1.54
HCLTECH	1,164.60	1,147.00	1.51
HEROMOTOCC	4877.5	4807	1.45

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
ADANIGREEN	1,604	1,632	1,589	6-Jul-26
DIVISLAB	7,196	7,209	6,968	15-May-26
BIOCON	437	445	440	26-May-26
IPCALAB	1,827	1,851	1,839	13-Jul-26
JBCHEPHARM	2,491	2,491	2,474	9-Jul-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
ITC	275	275	275	4-Jun-26
VEDL	268	266	268	13-Jul-26
PATANJALI	407	406	406	30-Jun-26
PIIND	2,542	2,527	2,541	30-Jun-26
BECTORFOOD	167	166	167	13-Jul-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
ORIENTTECH	17,336	2,991	2,427	280
PDSL	9,247	1,605	980	381
LANDMARK	9,852	1,717	1,004	507
HGS	1,689	296	169	452
NUVOCO	21,134	3,774	2,162	339
BALPHARMA	544	100	68	91
DYCL	9,521	1,755	1,055	392
NURECA	504	95	58	273
VRAJ	607	114	73	133
HARIOMPIPE	5,609	1,055	642	397
WANBURY	7,640	1,460	884	340
ALPA	163	34	22	73
HINDCOMPOS	81	17	35	448
SHRADHA	594	127	73	36
PNC	133	29	19	20
NIRLON	67	15	10	650
ESSARSHPNG	2,630	591	364	20
BBNPPGOLD	145	33	27	136
JUSTDIAL	42,569	9,787	5,437	803
MANAKALUCO	627	145	107	37
PLASTIBLEN	1,106	257	149	199
SGFIN	4,964	1,167	1,041	606
SINTERCOM	247	59	40	77
TCPLPACK	42	10	7	3,249

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AASTHA	Rathod Digvijaysinh Rajendrasinh	SELL	293	135.5
AASTHA	Trade Pulse Broking Private Limited	BUY	300	135.5
AGIIL	Arihant Capital Markets Limited	SELL	1263	347.5
AGIIL	Arihant Capital Markets Limited	BUY	1264	347.2
ATALREAL	Achintya Securities Limited	BUY	700	29.0
ATALREAL	Altizen Ventures Llp	SELL	2224	28.9
ATALREAL	Hrti Private Limited	SELL	318	28.8
ATALREAL	Hrti Private Limited	BUY	877	28.9
ATALREAL	Vanita Sanjay Bansal	SELL	722	29.0
BIOCON	Icici Prudential Mutual Fund	BUY	18438	400.0
BIOCON	Mylan Inc.	SELL	45984	400.0
COUNCODOS	Amit Kumar Jain	SELL	349	7.5
COUNCODOS	Amit Kumar Jain	BUY	429	7.5
DYCL	Alphagrep Securities Private Limited	SELL	281	394.8
DYCL	Alphagrep Securities Private Limited	BUY	281	394.6
DYCL	Junomoneta Finsol Private Limited	BUY	446	395.2
DYCL	Junomoneta Finsol Private Limited	SELL	450	395.4
DYCL	Microcurves Trading Private Limited	BUY	323	397.2
DYCL	Microcurves Trading Private Limited	SELL	323	397.6
DYCL	Nk Securities Research Private Limited	SELL	290	396.9
DYCL	Nk Securities Research Private Limited	BUY	290	396.8
DYCL	Qe Securities Llp	BUY	246	392.8
DYCL	Qe Securities Llp	SELL	246	395.6
DYCL	Silverleaf Capital Services Private Limited	SELL	252	396.3
DYCL	Silverleaf Capital Services Private Limited	BUY	252	396.0
EXIMROUTES	Allina Qureshi	SELL	198	110.0
EXIMROUTES	Bima Pay Technology Private Limited	BUY	198	110.0
FINOPB	Alphagrep Securities Private Limited	BUY	567	177.8
FINOPB	Alphagrep Securities Private Limited	SELL	567	177.7
FINOPB	Blitzquant Research Llp	SELL	979	181.0
FINOPB	Blitzquant Research Llp	BUY	979	180.9
FINOPB	Clt Research Tech Private Ltd	BUY	694	180.1
FINOPB	Clt Research Tech Private Ltd	SELL	694	180.2
FINOPB	Dipan Mehta Commodities Private Limited	BUY	1500	179.1
FINOPB	Dipan Mehta Commodities Private Limited	SELL	1504	179.4
FINOPB	Elixir Wealth Management Private Limited	SELL	990	179.8
FINOPB	Elixir Wealth Management Private Limited	BUY	1008	179.2
FINOPB	Grt Strategic Ventures Llp	SELL	666	180.7
FINOPB	Grt Strategic Ventures Llp	BUY	666	180.7
FINOPB	Imc India Securities Private Limited	SELL	435	178.0
FINOPB	Imc India Securities Private Limited	BUY	435	175.8
FINOPB	Irage Broking Services Llp	SELL	718	179.4
FINOPB	Irage Broking Services Llp	BUY	1197	177.8
FINOPB	Jump Trading Financial India Private Limited	BUY	1195	179.9

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
FINOPB	Jump Trading Financial India Private Limited	SELL	1195	179.9
FINOPB	Junomoneta Finsol Private Limited	BUY	884	178.7
FINOPB	Junomoneta Finsol Private Limited	SELL	935	178.6
FINOPB	Microcurves Trading Private Limited	BUY	2340	180.2
FINOPB	Microcurves Trading Private Limited	SELL	2340	180.3
FINOPB	Nk Securities Research Private Limited	SELL	1673	179.5
FINOPB	Nk Securities Research Private Limited	BUY	1673	179.4
FINOPB	Puma Securities	SELL	478	178.6
FINOPB	Puma Securities	BUY	478	178.5
FINOPB	Qe Securities Llp	BUY	1329	179.6
FINOPB	Qe Securities Llp	SELL	1357	179.6
FINOPB	Share India Securities Limited	BUY	439	182.2
FINOPB	Share India Securities Limited	SELL	443	182.2
FINOPB	Silverleaf Capital Services Private Limited	SELL	798	177.4
FINOPB	Silverleaf Capital Services Private Limited	BUY	798	177.4
FINOPB	Vinsul Makardi Ltd	BUY	447	178.7
FINOPB	Vinsul Makardi Ltd	SELL	447	179.0
GCSL	Mansukh Securities & Finance Limited	BUY	92	510.6
GCSL	Mansukh Securities & Finance Limited	SELL	121	508.1
HARIOMPIPE	Junomoneta Finsol Private Limited	SELL	195	416.3
HARIOMPIPE	Junomoneta Finsol Private Limited	BUY	198	415.8
HARIOMPIPE	Microcurves Trading Private Limited	BUY	181	420.0
HARIOMPIPE	Microcurves Trading Private Limited	SELL	181	420.2
HARIOMPIPE	Qe Securities Llp	SELL	266	413.6
HARIOMPIPE	Qe Securities Llp	BUY	268	415.6
IKIO	Hrti Private Limited	BUY	499	218.3
IKIO	Hrti Private Limited	SELL	506	219.6
IKIO	Junomoneta Finsol Private Limited	SELL	591	219.3
IKIO	Junomoneta Finsol Private Limited	BUY	593	219.5
JUSTDIAL	Blitzquant Research Llp	SELL	724	760.1
JUSTDIAL	Blitzquant Research Llp	BUY	724	759.8
JUSTDIAL	Dipan Mehta Commodities Private Limited	SELL	494	765.2
JUSTDIAL	Dipan Mehta Commodities Private Limited	BUY	494	764.5
JUSTDIAL	Elixir Wealth Management Private Limited	SELL	866	763.7
JUSTDIAL	Elixir Wealth Management Private Limited	BUY	869	762.9
JUSTDIAL	Grt Strategic Ventures Llp	SELL	522	763.4
JUSTDIAL	Grt Strategic Ventures Llp	BUY	522	763.0
JUSTDIAL	Irage Broking Services Llp	SELL	1120	762.4
JUSTDIAL	Irage Broking Services Llp	BUY	1407	763.4
JUSTDIAL	Jump Trading Financial India Private Limited	BUY	548	764.4
JUSTDIAL	Jump Trading Financial India Private Limited	SELL	548	765.1
JUSTDIAL	Junomoneta Finsol Private Limited	BUY	629	763.4
JUSTDIAL	Junomoneta Finsol Private Limited	SELL	632	764.0
JUSTDIAL	Microcurves Trading Private Limited	BUY	1549	763.7
JUSTDIAL	Microcurves Trading Private Limited	SELL	1549	764.1
JUSTDIAL	Musigma Securities	SELL	651	765.8
JUSTDIAL	Musigma Securities	BUY	651	765.5

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
JUSTDIAL	Nk Securities Research Private Limited	BUY	1572	761.6
JUSTDIAL	Nk Securities Research Private Limited	SELL	1572	762.0
JUSTDIAL	Qe Securities Llp	BUY	1040	760.5
JUSTDIAL	Qe Securities Llp	SELL	1063	760.0
KALYANKJIL	Graviton Research Capital Llp	BUY	8691	523.6
KALYANKJIL	Graviton Research Capital Llp	SELL	8691	523.6
KALYANKJIL	Hrti Private Limited	BUY	5350	525.4
KALYANKJIL	Hrti Private Limited	SELL	5862	525.1
KCK	Satyajit Shivajirao Naik	SELL	15	15.9
KCK	Satyajit Shivajirao Naik	BUY	470	16.1
LANDMARK	Irage Broking Services Llp	SELL	217	481.7
LANDMARK	Irage Broking Services Llp	BUY	242	482.4
LANDMARK	Junomoneta Finsol Private Limited	SELL	270	481.5
LANDMARK	Junomoneta Finsol Private Limited	BUY	277	481.5
LANDMARK	Microcurves Trading Private Limited	BUY	433	482.8
LANDMARK	Microcurves Trading Private Limited	SELL	433	482.9
LANDMARK	Nk Securities Research Private Limited	SELL	421	481.8
LANDMARK	Nk Securities Research Private Limited	BUY	422	481.5
LANDMARK	Silverleaf Capital Services Private Limited	BUY	288	476.8
LANDMARK	Silverleaf Capital Services Private Limited	SELL	288	476.3
MOBIKWIK	Hrti Private Limited	BUY	292	229.7
MOBIKWIK	Hrti Private Limited	SELL	425	228.5
MPEL	Amit Chaudhary	BUY	48	40.1
MPEL	Amit Chaudhary	SELL	50	40.0
MPEL	Arun Gahlot	SELL	48	40.1
MUNISH	Capacious Wealth Management Llp	SELL	190	69.1
MUNISH	Neha Madhok	BUY	145	69.0
MUNISH	Vipin Daga	SELL	157	69.0
ORIENTTECH	Alphagrep Securities Private Limited	BUY	523	289.0
ORIENTTECH	Alphagrep Securities Private Limited	SELL	523	289.2
ORIENTTECH	Hrti Private Limited	SELL	337	288.6
ORIENTTECH	Hrti Private Limited	BUY	346	287.7
ORIENTTECH	Jump Trading Financial India Private Limited	SELL	292	288.3
ORIENTTECH	Jump Trading Financial India Private Limited	BUY	292	288.2
ORIENTTECH	Junomoneta Finsol Private Limited	SELL	437	288.9
ORIENTTECH	Junomoneta Finsol Private Limited	BUY	440	288.7
ORIENTTECH	Microcurves Trading Private Limited	BUY	567	289.9
ORIENTTECH	Microcurves Trading Private Limited	SELL	567	290.1
ORIENTTECH	Musigma Securities	BUY	248	290.7
ORIENTTECH	Musigma Securities	SELL	248	290.8
ORIENTTECH	Nk Securities Research Private Limited	BUY	586	288.7
ORIENTTECH	Nk Securities Research Private Limited	SELL	586	288.8
ORIENTTECH	Puma Securities	BUY	232	289.0
ORIENTTECH	Puma Securities	SELL	232	288.9
ORIENTTECH	Qe Securities Llp	BUY	346	288.8
ORIENTTECH	Qe Securities Llp	SELL	353	289.5
ORIENTTECH	Vinsul Makardi Ltd	SELL	265	288.6
ORIENTTECH	Vinsul Makardi Ltd	BUY	265	288.1
PPSL	Shailendra Ishwardas Chandgotia	SELL	729	2.4

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
PRANIK	Allina Qureshi	SELL	96	43.0
PRANIK	Bima Pay Technology Private Limited	BUY	96	43.0
RADIOWALLA	Amritaanshu Agrawal	BUY	147	24.5
RADIOWALLA	Bengal Finance & Investment Private Limited	SELL	144	24.5
RAMCOSYS	Hrti Private Limited	SELL	156	858.1
RAMCOSYS	Hrti Private Limited	BUY	189	849.6
SATKARTAR	Allina Qureshi	SELL	160	132.5
SATKARTAR	Bima Pay Technology Private Limited	BUY	160	132.5
SGFIN	Classic Enterprises	SELL	324	628.6
SINTERCOM	Bellwether Capital Private Limited	SELL	230	77.0
SUMEET-RE	Ajay Mittal	BUY	1950	2.5
SUMEET-RE	Neo Apex Share Broking Services Llp	BUY	1125	2.5
SUMEET-RE	Padmini Polytex Private Limited	SELL	15750	2.5
SUMEET-RE	Prijal Tradefin Llp	BUY	100	2.5
SUMEET-RE	Prijal Tradefin Llp	SELL	940	2.6
TBZ	Hrti Private Limited	BUY	627	251.8
TBZ	Hrti Private Limited	SELL	652	250.9
TBZ	Junomoneta Finsol Private Limited	BUY	870	253.3
TBZ	Junomoneta Finsol Private Limited	SELL	877	253.3
TBZ	Microcurves Trading Private Limited	SELL	560	253.4
TBZ	Microcurves Trading Private Limited	BUY	560	253.5
TBZ	Nk Securities Research Private Limited	BUY	442	256.2
TBZ	Nk Securities Research Private Limited	SELL	442	256.3
TBZ	Qe Securities Llp	SELL	621	251.5
TBZ	Qe Securities Llp	BUY	637	253.0
WANBURY	Grt Strategic Ventures Llp	BUY	175	338.3
WANBURY	Grt Strategic Ventures Llp	SELL	175	338.7
WANBURY	Junomoneta Finsol Private Limited	BUY	325	337.8
WANBURY	Junomoneta Finsol Private Limited	SELL	330	338.1
WANBURY	Nk Securities Research Private Limited	SELL	176	336.9
WANBURY	Nk Securities Research Private Limited	BUY	176	336.7
WANBURY	Silverleaf Capital Services Private Limited	BUY	175	338.9
WANBURY	Silverleaf Capital Services Private Limited	SELL	175	338.9
YATHARTH	Classic Enterprises	SELL	500	814.4
YATHARTH	Hr Global Manufacturing Private Limited	BUY	500	814.7
ZENSARTECH	Hrti Private Limited	BUY	1000	539.9
ZENSARTECH	Hrti Private Limited	SELL	1171	542.7

Block Deals

Security Name	Client Name	Buy / Sell	Qnty	Price
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	12,50,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	7,50,000	400.0
BIOCON	Biocon Limited	BUY	7,50,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	9,37,500	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	58,29,005	400.0
BIOCON	Biocon Limited	BUY	12,50,000	400.0
BIOCON	Biocon Limited	BUY	1,84,37,500	400.0
BIOCON	Biocon Limited	BUY	9,37,500	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	SELL	4,59,83,509	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	18,75,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0
BIOCON	Biocon Limited	BUY	6,26,000	400.0

Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
Aeroflex Neu Limited	Other business
Agri-Tech (India) Limited	Financial Results
Angel One Limited	Financial Results
Angel One Limited	Financial Resul
Ather Energy Limited	Fund Raising
Brigade Enterprises Limited	Fund Raising
Emmvee Photovoltaic Power Limited	Financial Resul
Fedbank Financial Services Limited	Financial Resul
Goa Carbon Limited	Financial Resul
Billionbrains Garage Ventures Limited	Financial Resul
GTPL Hathway Limited	Financial Resul
HDB Financial Services Limited	Financial Resul
HDFC Asset Management Company Limited	Financial Resul
HDFC Life Insurance Company Limited	Financial Resul
Himadri Speciality Chemical Limited	Financial Resul
ICICI Lombard General Insurance Company L	Financial Resul
ICICI Prudential Life Insurance Company Limi	Other business
Jana Small Finance Bank Limited	Financial Resul
Sai Silks (Kalamandir) Limited	Financial Resul
Ksolves India Limited	Financial Resul
Mangalore Refinery and Petrochemicals Limi	Financial Resul
Network18 Media & Investments Limited	Financial Resul
Oriental Hotels Limited	Financial Resul
Reliance Industrial Infrastructure Limited	Financial Resul
Raghav Productivity Enhancers Limited	Financial Resul
SONAM LIMITED	Financial Resul
Steel Strips Wheels Limited	Financial Resul
Union Bank of India	Financial Resul

Nifty & Bank Spot – Pivot Levels 15/07/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	**24052.05**	**23997**	**23943**	**23863**	**24131**	**24211**	**24265**
Bank Nifty	**57462.30**	**57218**	**56975**	**56664**	**57772**	**58083**	**58326**

SBI Cards and Payment Services Ltd – Technical Stock Call – 15/07/2026

Technical Stock Call	Action	Reco	Target	Support	SL
SBICARD	BUY	638.85	680	(625-603-585)	565

Sector: Financial Services

About: **SBI Cards and Payment Services Ltd.** is India's **second-largest pure-play credit card issuer**, offering a wide range of credit card and payment solutions to retail and corporate customers. Today, SBI remains the promoter with a majority stake.

View – Medium Term Bullish

The stock witnessed a corrective phase after marking a high of 906.40 (JAN 26) & remained under pressure within a Descending Channel. During this period, lower lows were formed at 725.60 (JAN 26) & 615.50 (MAR 26), eventually the stock slipping to a low of 565.45 (JUN 26).

Thereafter, buying interest emerged from lower levels leading to a gradual recovery & the stock rallied to mark a high of 638.80 (JUN 26). Recently, the stock has formed higher bottoms at 579.90 (JUL 26) & has given a **Descending Channel Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 641.75 (JUL 26), which is higher than the previous swing top.

Indicators like Stoch RSI & Williams %R suggests positive crossover. Target of **680** is expected with lower support levels at **(625-603-585)** in case of intermediate fall. A stop loss at **565** is to be followed for the trade.

All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Wanbury Ltd – Technical Stock Call – 15/07/2026

Technical Stock Call	Action	Reco	Target	Support	SL
WANBURY	BUY	336	512	(320-305)-294-(283-270)	248

View – Medium Term Bullish

The stock commenced its downtrend from 329.70 (MAY 25).

Forming Double Tops, the stock traded below averages & extended its decline to mark a low of 161.50 (JAN 26).

Buying emerged at lower levels & the stock commenced its up move, further rallied upwards to mark a high of 315.20 (MAY 26), but could not surpass its previous high & witnessed a minor correction.

Recently, after forming higher bottoms at 248.70 (JUN 26), the stock has given a **Ascending Triangle Breakout** supported by volumes reaching to a high of 349.90 (JUL 26), which is higher than the previous swing highs.

On the momentum front, **Stochastic RSI, MACD & Aroon** indicators suggest positive crossover.

Target of **512** is expected with lower support levels at **(320-305)-294-(283-270)** in case of intermediate fall.

A stop loss at **248** is to be followed for the trade.

Global Macro Events (15th July 2026)		
Event	**Previous**	**Forecasted**
India		
Unemployment Rate JUN	0.055	0.053
Passenger Vehicles Sales YoY JUN	0.253	
USA		
Fed Bowman Speech		
Net Long-term TIC Flows MAY	$103.1B	
Foreign Bond Investment MAY	$50.5B	
Overall Net Capital Flows MAY	$26.1B	
API Crude Oil Stock Change JUL/10	-0.399M	
MBA 30-Year Mortgage Rate JUL/10	0.0658	
MBA Mortgage Applications JUL/10	-0.022	
MBA Mortgage Market Index JUL/10	266.3	
MBA Mortgage Refinance Index JUL/10	794.4	
MBA Purchase Index JUL/10	169.5	
PPI MoM JUN	0.011	0.001
Core PPI MoM JUN	0.004	0.002
NY Empire State Manufacturing Index JUL	5.7	6.2
Core PPI YoY JUN	0.049	0.049
PPI JUN	157.659	158.4
PPI Ex Food, Energy and Trade MoM JUN	0.008	0.003
PPI Ex Food, Energy and Trade YoY JUN	0.051	0.05
PPI YoY JUN	0.065	0.063
Fed Williams Speech		
Fed Chair Warsh Testimony		
EIA Crude Oil Stocks Change JUL/10	2.998M	
EIA Gasoline Stocks Change JUL/10	-1.904M	
EIA Crude Oil Imports Change JUL/10	1.096M	
EIA Cushing Crude Oil Stocks Change JUL/10	-0.052M	
EIA Distillate Fuel Production Change JUL/10	-0.001M	
EIA Distillate Stocks Change JUL/10	-4.98M	
EIA Gasoline Production Change JUL/10	-0.233M	
EIA Heating Oil Stocks Change JUL/10	-0.427M	
EIA Refinery Crude Runs Change JUL/10	-0.172M	
17-Week Bill Auction	0.0379	
NOPA Crush Report		
Fed Cook Speech		
Fed Beige Book		
China		
House Price Index YoY JUN	-0.035	-0.034
GDP Growth Rate YoY Q2	0.05	0.046

Industrial Production YoY JUN	0.045	0.05
Retail Sales YoY JUN	-0.006	0.002
Fixed Asset Investment (YTD) YoY JUN	-0.041	-0.048
GDP Growth Rate QoQ Q2	0.013	0.01
Industrial Capacity Utilization Q2	0.736	0.74
Unemployment Rate JUN	0.051	0.051
New Yuan Loans JUN	CNY520B	CNY 2000B
M2 Money Supply YoY JUN	0.086	0.085
Outstanding Loan Growth YoY JUN	0.055	0.054
Total Social Financing JUN	CNY2030B	CNY 3890B
FDI (YTD) YoY JUN	-0.086	-0.09
Great Britain		
Chancellor Reeves Mansion House Speech	0.034	0.025
Germany		
30-Year Bund Auction	3.49%	0.50%
Bundesbank President Nagel Speech		6.20%

#STOCK SPECIFIC NEWS

L&T Technology Services
Reported Q1FY27 consolidated revenue of ₹2,940.1 crore, up 11.47% YoY and 3.96% QoQ, with net profit rising 12.97% YoY to ₹357.1 crore (vs ₹316.1 crore in Q1FY26; +7.3% QoQ) and diluted EPS at ₹33.59 vs ₹29.77 YoY; EBIT margin improved, Sustainability remained the largest segment, and no dividend/buyback/bonus was announced. Steady double-digit growth keeps the ER&D franchise intact into FY27; margin trajectory and Mobility recovery are the key monitorables. Sahi Research

Tata Elxsi
Q1FY27 consolidated revenue rose 14.46% YoY (+2.75% QoQ) to ₹1,021.11 crore — crossing ₹1,000 crore for the first time — with net profit up 18.17% YoY at ₹170.60 crore, though EBIT margin narrowed to 18.97% on higher operating costs (vs 22.27% a year ago; growth led by Transportation and Media & Communication, with a new JSW Motors partnership to set up the JNEXT NextGen Technology Centre in Pune and AI product launches AnaTel and ViTel). Revenue milestone positive; margin compression remains the bear point. Sahi Research | ScanX

HCL Technologies
The stock was the top Sensex laggard on Tuesday, falling 4.4–4.6%, as unchanged FY27 guidance overshadowed stronger-than-expected quarterly results. Q1 net profit rose 20.3% YoY to ₹4,624 crore and revenue grew 13.9% to ₹34,579 crore, beating Bloomberg estimates of ₹4,530 crore and ₹34,327 crore, led by financial services, manufacturing and technology & services; EBIT rose 18% to ₹5,831 crore with margin at 16.86% (vs 16.28% YoY) and dollar revenue of $3,650 mn, up 2.96% YoY. Guidance conservatism is now the stock's near-term overhang despite the beat. Trading Economics | Business Standard

ICICI Prudential AMC
Shares fell about 2.3% on Tuesday despite the company posting a 23% rise in quarterly profit, with the recently listed AMC facing sell-on-news pressure amid a weak broader tape. Profit momentum remains healthy; valuation and flow trends into equity schemes are the monitorables for the stock's next leg. Trading Economics

Container Corporation of India (CONCOR)
Shares rose on Tuesday after Q1FY27 EXIM throughput increased 9.8% YoY to 10.7 lakh TEUs, indicating resilient containerised trade volumes despite Gulf shipping disruptions. Volume-led operating leverage is supportive ahead of the full Q1 print; watch originating volumes and lead-distance mix. Trendlyne

Godawari Power & Ispat
The company has temporarily suspended its Raipur pellet plant, which may impact Q2FY27 profitability. The disclosure introduces near-term earnings risk in the pellet segment; restart timelines and any volume/EBITDA guidance revision are the immediate triggers. Trendlyne

Wipro
Jefferies expects Q1FY27 IT services revenue to decline 1.7% QoQ, weighed by wage hikes and acquisition-related costs, ahead of results scheduled Thursday, 16 July. Margin commentary and large-deal TCV will drive the stock's post-results direction given the sector's guidance-sensitivity seen in HCL Tech's reaction. Trendlyne

Saatvik Green Energy
Motilal Oswal initiated coverage with a 'Buy' rating and a target price of ₹565, adding institutional sponsorship to the solar module manufacturer. Fresh initiations in renewables continue to broaden the ownership base for recently listed clean-energy names. Trendlyne

Union Bank of India / HDFC Life (Results Today)
The earnings season gains further pace this week with Union Bank of India and HDFC Life scheduled for July 15; Wipro, Tech Mahindra and Bharat Heavy Electricals follow on July 16, and JSW Steel, Federal Bank and Tata Technologies on July 17. NII trajectory and credit costs (Union Bank) and VNB margin/APE growth (HDFC Life) are today's focus prints. Goodreturns

Aluminum Corporation of China (Chalco)
— regional metals read-through The state-owned aluminium major surged over 9% in Hong Kong after forecasting a 58–73% YoY rise in first-half net profit, a positive read-across for Indian aluminium plays (Hindalco, NALCO, Vedanta) on regional pricing and demand strength amid elevated energy costs. CNBC

##SECTION 2: CORPORATE ANNOUNCEMENTS

L&T Technology Services
/ Board & Promoter-Group Changes Alongside results, the board approved Nabha Power Ltd's request for re-classification from 'Promoter Group' to 'Public' category (subject to exchange/regulatory approvals); Narayanan Kumar ceased as Independent Director effective close of business 14 July 2026 on completion of his second five-year term, and Luis Miranda was re-appointed as Independent Director for a second five-year term from 19 October 2026 to 18 October 2031, pending shareholder approval. Governance-neutral, but promoter-group reclassification marginally improves effective public float. Filing Coverage — Free Press Journal

Tata Elxsi
/ Q1FY27 Results Filing & Strategic Partnership Filed audited Q1FY27 results and announced a strategic partnership with JSW Motors to establish the JNEXT – JSW NextGen Technology Centre in Pune, a strategic engineering hub for software-defined, AI-powered mobility solutions; the filing also references the AI-native AnaTel (healthcare, with OpenAna) and ViTel (material intelligence, with Viridium AI) platform launches. Deepens the Transportation vertical pipeline. Filing Coverage — ScanX

Ministry of Commerce & Industry / WPI–PPI Statistical Release
The official release confirms June 2026 WPI at 9.87% YoY (index 110.2), publishes the Output PPI at 109.9 and trial Input PPI at 107.1, and revises April 2026 final WPI inflation to 8.36% from the 8.26% provisional estimate; the July print is scheduled for Friday, 14 August 2026. Relevant compliance/statistical disclosure for rate-sensitive positioning. Official Release — PIB

###SECTION 3: MACRO / NON-STOCK NEWS

Indian Equities — Tuesday Wrap: Second Straight Weak Close
The Sensex fell 0.7% to 77,054.94 and the Nifty 50 lost 0.7% to 24,052.05, with Bank Nifty underperforming at −1.2% (57,462.30); selling was broad-based as renewed foreign outflows and inflation pressure dented sentiment, with HCL Tech (−4.4%), IndiGo (−2.3%), Bajaj Finserv (−2.2%), SBI (−2.1%), M&M (−2.1%) and L&T (−2%) leading losses while Bharti Airtel (+1.7%), TCS (+0.9%) and Sun Pharma (+0.8%) gained. 5paisa| Trading Economics

Volatility — India VIX Rises
India VIX rose 3.9% to 14, a still-contained absolute level that nonetheless reflects rising hedging demand into the earnings-heavy, geopolitically sensitive week. Elevated crude and FII selling argue for continued option-premium firmness near-term. 5paisa

GIFT Nifty — Muted, Slightly Negative Open Indicated
GIFT Nifty traded at 24,031, down about 0.1% at 1:38 AM IST on 15 July, signalling a flat-to-mildly-cautious start despite Wall Street's inflation-relief bounce; follow-through depends on crude behaviour and China's data dump through the Asian session. Trendlyne

Institutional Flows — FIIs Remain Net Sellers
FIIs sold ₹739.69 crore net in cash equities on July 14 while DIIs bought ₹2,927.71 crore, extending Monday's pattern where FIIs offloaded ₹3,062.30 crore against DII purchases of ₹2,171.70 crore. Domestic absorption continues to cushion foreign risk-off; sustained FII selling caps upside. Trendlyne | 5paisa

India WPI — Fresh Record High at 9.87%
Wholesale inflation edged up to a fresh all-time high of 9.87% in June (new series) from 9.68% in May as food and primary-article prices accelerated; fuel & power printed 27.41%, primary articles 7.0% and manufactured products 7.48%, with mineral oils, food articles, basic metals and chemicals the key drivers. Bank of Baroda's Madan Sabnavis called pressures broad-based and expects WPI in the 9–10% range over the next couple of months, with monsoon/kharif the swing factor. Business Standard | PIB

Inflation Pass-Through — WPI Food & Fuel Detail
The WPI Food Index accelerated to 6.14% YoY in June from 4.49% in May, while food articles inflation quickened to 5.49% from 3.6%, primary articles hit an 18-month high, and crude petroleum & natural gas inflation eased to 34.75% from 61.51%; base metals (12.31%), chemicals (12.78%), textiles (10.85%) and electrical equipment (11.03%) stayed in double digits. Input-cost stickiness is a margin headwind for FMCG, consumer durables and manufacturing into Q2FY27. Business Standard

Rate Backdrop — CPI Above Target Ahead of MPC
Retail inflation surged to 4.38% in June, exceeding the RBI's 4% target for the first time since January 2025, and the near-10% WPI print reinforces upside risk to the CPI trajectory via pipeline pressures. The combination hardens the case against near-term easing and keeps rate-sensitives (banks, NBFCs, autos, realty) on the defensive. Trading Economics

Rupee — Near Record Lows, Around 96 to the Dollar
The rupee weakened to around 96 against the US dollar on Tuesday, down roughly 0.7% on the day and near record lows, amid a surge in crude prices and renewed geopolitical concerns. Elevated oil, FII outflows and safe-haven dollar demand keep depreciation pressure intact; watch RBI intervention around the 96.50 handle. Business Standard

Crude Oil — Brent Firms on Gulf Tensions, Hormuz Fee Dropped
Brent crude firmed to around $85.4 a barrel (+0.8%) as escalating Gulf military activity raised supply concerns; prices eased off intraday highs after President Trump abandoned the demand for a 20% protection fee on Strait of Hormuz transits, replacing it with Gulf "trade and investment deals" — WTI settled around $79.8 (+0.6%). $80+ crude remains negative for India's CAD, OMCs, paints, aviation and tyres. Business Standard | CNBC

Geopolitics — US–Iran Escalation Continues
The US military struck Iran for a third consecutive night, while President Trump reinstated a naval blockade on Iranian shipping through the Strait of Hormuz corridor. Freight, insurance and energy-import costs remain the principal transmission channels into Indian macro; shipping and defence names retain event-driven bid. Trading Economics

US Inflation — June CPI Cooler Than Feared
US consumer prices fell 0.4% MoM and rose 3.5% YoY in June — below the 3.8% consensus — with core CPI flat at 0.0% MoM and 2.6% YoY, as energy eased. The downside surprise anchored the overnight risk rally and tempers, without eliminating, Fed tightening expectations. Yahoo Finance

US Markets — S&P 500 Higher on Inflation Relief, Semis Rebound
The S&P 500 closed +0.38% at 7,543.59, the Nasdaq Composite gained 0.9% to 26,107.01 and the Dow was flat at 52,508.27, boosted by semiconductors after the soft June CPI; the iShares Semiconductor ETF rose over 3% after Monday's 4.8% drop, with SOXX 50-day volatility at its highest since May 2020. Constructive handoff for Asian IT/tech proxies at today's open. CNBC

IBM — Historic 25% Collapse a Caution for IT Sentiment
IBM warned second-quarter profits will be lower than expected on soft software and infrastructure demand, sending the stock down 25% — on pace for its worst day since October 1987. The magnitude of the guidance-driven de-rating is a sentiment overhang for global enterprise-tech spending narratives, relevant to Indian IT positioning. CNBC

US Bank Earnings — Goldman Blowout, Citi Beats
Goldman Sachs reported Q2 EPS of $20.98 versus the $14.48 LSEG consensus on revenue of $20.34 billion (est. $16.13 billion), with the stock up over 7%; Citigroup posted EPS of $3.15 on revenue of $24.77 billion against estimates of $2.74 and $23.74 billion, though shares fell ~4%. Strong capital-markets revenue is a positive read-through for Indian capital-market plays. CNBC | Yahoo Finance

Federal Reserve — Warsh Testimony, Hike Odds in Focus
Fed Chairman Kevin Warsh began his first semi-annual monetary policy testimony before Congress on Tuesday, amid what he has called a "family fight" over whether to tighten policy, with markets pricing a quarter-point hike as soon as September per CME FedWatch; post-CPI, markets assign an 83.4% probability the Fed leaves rates unchanged in July. Day two of testimony continues today. CNBC | TS2

US Data Today — PPI and Empire State
The June Producer Price Index and July Empire State index are due at 8:30 am ET today; June PPI is expected flat after May's 1.1% jump, with traders watching the 5.8-point gap between stage-1 intermediate demand prices (+12.3% YoY) and final goods (+6.5%) as a margin-squeeze signal even as S&P 500 Q2 earnings-growth forecasts have jumped to 23.4% from 15.2%. CNBC | TS2

China — June Exports at Fastest Pace Since 2021
Mainland China stocks closed 2.15% higher at 4,796.50 after June exports jumped at the fastest pace since 2021, driven by the AI boom and a tariff rush, while Hong Kong's Hang Seng gained about 0.6% on basic materials and energy strength. Export resilience supports the regional trade complex and metals demand sentiment. CNBC

China — Q2 GDP and June Activity Data Due
Today's Asian calendar features China's Q2 GDP and June activity data, with divergence expected: subdued domestic activity reflected in falling retail sales YoY while the export engine holds

industrial output at a solid +4.6% YoY, and investment still weak. A sub-consensus GDP print would pressure metals and regional risk appetite; a beat supports the cyclical trade. InvestingLive

Asia-Pacific — Energy-Led Gains, Kospi Stabilises
Japan's Nikkei 225 reversed losses to close 0.7% higher at 67,743.50, supported by energy stocks — Inpex +3.9%, Idemitsu Kosan +2%, Cosmo Energy +1.5% — while South Korea's Kospi rose 0.7% to 6,856.83, reversing early losses after Monday's Gulf-driven rout. Oil-price beneficiaries continue to lead regional tapes. CNBC

Europe — Lower Close; Bond Yields Rise, BoE Hike Bets Build
European benchmarks closed lower Tuesday — FTSE 100 −0.45% (10,453), DAX −0.46% (24,998), CAC 40 −0.70% (8,305), STOXX 50 −0.57% (6,235); travel & leisure fell 2.1% while BP opened +2.7% on stronger Q2 oil trading, and global 10-year yields rose ~4–8bp as the Gulf escalation reignited inflation fears, with UK rate futures now pricing ~50bp of BoE hikes by December versus ~40bp on Monday. 5paisa | CNBC

Global Earnings Today — Financials and Healthcare Heavyweights
Morgan Stanley, Johnson & Johnson, BlackRock, PNC Financial, BNY Mellon, M&T Bank, Elevance Health, United Airlines, J.B. Hunt and Cintas report today, followed Thursday by Netflix, UnitedHealth, Abbott, GE Aerospace, Prologis and State Street. Bank NII and trading commentary will shape the global financials tone that Indian lenders have recently tracked. CNBC

US Media/M&A — 12 States Sue to Block Paramount–WBD
Twelve US states filed suit to block the $110 billion Paramount–Warner Bros. Discovery merger, posing a new challenge to a deal uniting two of the largest US media companies. Regulatory friction in global media consolidation bears watching for cross-border content-market dynamics. CBS News

AI Infrastructure Policy — New York Bans AI Data Centers
New York became the first US state to impose an AI data center ban, an early regulatory marker in the global AI-infrastructure buildout. Marginally supportive for alternative geographies — including India's emerging AI-DC capex cycle (TCS, HCL Tech investments) — as hyperscale siting decisions get politicised. CNBC

Disclosures and Disclaimer

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