ITI Morning Boost

THE INVESTMENT TRUST OF INDIA
RETAIL BROKING

July 21, 2026

NIFTY – 24,238.50 (Daily Chart)

• In Monday's trading session, the Nifty opened with a gap down and remained range-bound throughout the session, resulting in a negative close.

• On a daily scale, the index has formed a small bullish candle, which reflects a neutral market sentiment. The index managed to hold the support of the 20 DEMA, which is a positive sign for the bulls. However, to resume its upward journey, the index needs to decisively breach and sustain above the 200 DEMA, which is currently positioned at 24,084.

• **For Tuesday's trading session, 24,160 will act as the initial support level, while on the higher end, 24,260 will act as the initial resistance level.**

BANK NIFTY – 57,945.00 (Daily Chart)

•In Monday's trading session, the banking index opened with a gap down and traded sideways for most of the session. Towards the end of the day, the index recovered from its intraday lows, helping it trim a portion of its losses.

• On a daily scale, the index has formed a small bullish candle near the support of the 20 DEMA. Notably, the index has held above the 20 DEMA for the seventh consecutive trading session, indicating strong buying interest and firm bullish support at this level. However, to resume its upward journey, the index needs to decisively breach and sustain above the horizontal resistance of 58,660.

• **For Tuesday's trading session, 57,830 will act as the initial support level, while on the higher end, 58,110 will act as the initial resistance level.**

NAVINFLUOR CMP- 7,861.50 (Daily Chart) BUY ABOVE 7,865 SL 7,787 TGT 8,025.

YESBANK CMP- 22.93 (Daily Chart)

SELL FUT BELOW 22.90 SL 23.10 TGT 22.40.

STOCK'S IN NEWS

EMCURE : The pharma major said its co-marketed brand Poviztra has received approval from the Central Drugs Standard Control Organisation (CDSCO) for the treatment of non-cirrhotic metabolic dysfunction-associated steatohepatitis (MASH) in adults with moderate to advanced liver fibrosis (F2-F3).

CMP- 1,861.20
IMPACT- **POSITIVE**

SOBHA : The firm reported a sharp jump in first-quarter earnings, with net profit rising to ₹51 crore from ₹14 crore a year ago. Revenue grew 50% year-on-year to ₹1,278.1 crore, while EBITDA increased to ₹77.6 crore from ₹23.7 crore. The company's EBITDA margin expanded to 6.1% from 2.8% in the year-ago quarter.

CMP- 1,455.70
IMPACT- **POSITIVE**

ULTRACEMCO : UltraTech Cement reported a 17.2 percent year-on-year rise in consolidated net profit at Rs 2,604 crore for the quarter ended June 30, 2026, compared with Rs 2,221 crore in the year-ago period. Consolidated net sales increased 16.3 percent to Rs 24,465 crore from Rs 21,040 crore a year earlier.

CMP- 11,903.00
IMPACT- **POSITIVE**

PAYTM : One97 Communications, the parent company of Paytm, reported a 79% year-on-year increase in consolidated net profit to Rs 220 crore for the quarter ended June 30, 2026, helped by continued growth in its payments business, merchant subscriptions and financial services distribution.

CMP- 1,347.50
IMPACT- **POSITIVE**

ECONOMIC NEWS

- RBI Deputy Governor Swaminathan J stressed reviewing internal grievance redressal processes. He asked regulated entities to design complaint management systems carefully. These systems should prevent complaints from bypassing the Internal Ombudsman. Technology has transformed financial services and customer expectations significantly. Institutions must strive for faster and more transparent grievance resolution.

- India has opened the application process for 2026 import quotas under the India-UK CETA. This significant trade agreement facilitates reduced customs duties on vehicles imported from the UK, lowering tariffs from approximately 110% to just 10%.

NIFTY50 TOP GAINERS

Company	Price	Change	%Gain
Trent	2,925.90	83.50	2.94
Power Grid Corp	288.70	5.15	1.82
Bharti Airtel	1,940.10	31.30	1.64
Cipla	1,441.60	22.90	1.61
JSW Steel	1,257.00	19.70	1.59

NIFTY50 TOP LOSERS

Company	Price	Change	%Gain
Axis Bank	1,256.00	-72.50	-5.46
HDFC Bank	777.60	-42.00	-5.12
Maruti Suzuki	13,514.00	-289.00	-2.09
Kotak Mahindra	382.05	-7.90	-2.03
Jio Financial	238.92	-4.06	-1.67

NIFTY200 TOP GAINERS

Company	Price	Change	%Gain
PNB	111.76	5.99	5.66
Torrent Pharma	5,005.40	242.4	5.09
JSW Energy	567.7	26.5	4.9
Union Bank	175.93	7.47	4.43
Oil India	453.55	18.20	4.18

NIFTY200 TOP LOSERS

Company	Price	Change	%Gain
Axis Bank	1,256.00	-72.5	-5.46
HDFC Bank	777.6	-42	-5.12
AU Small Financ	993.3	-36.9	-3.58
Yes Bank	22.93	-0.68	-2.88
Billionbrains G	203.43	-18.20	-4.18

OPEN INTEREST GAINERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
RADICO	4,144.10	43.50	1.06%	557	11.46%
TORNTPHARM	4,937.50	182.70	3.84%	3,571.80	8.05%
GVT&D	4,466.50	75.60	1.72%	1,736.50	5.67%
BPCL	318.90	3.30	1.05%	41,943.10	3.12%
CDSL	1,385.90	-34.50	-2.43%	9,291	2.61%

OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
BANDHANBNK	211.38	-1.89	-0.89%	78,156.00	-14.56%
INDUSTOWER	403.50	-1.00	-0.25%	88,476.50	-9.99%
PNB	112.06	6.04	5.70%	2,84,104.00	-8.49%
JSWENERGY	567.90	26.15	4.83%	23,766.10	-7.11%
UNIONBANK	176.66	8.02	4.76%	1,26,082	-7.05%

INDEX HIGHEST OI

F&O Ban list
KAYNES
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Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
28/07/26	NIFTY	25,000	24,000	1.08
28/07/26	BANKNIFTY	59,000	58,000	0.93

FII & DII TRADING ACTIVITY CASH

	FII Rs Crores			DII Rs Crores		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,93,889.47	1,99,557.38	-5,667.91	2,53,114.75	2,30,728.71	22,386.04
20-Jul-26	13,312.67	14,433.71	-1,121.04	16,187.84	14,875.81	1,312.03
17-Jul-26	14,393.77	14,770.18	-376.41	17,180.08	16,162.19	1,017.89
16-Jul-26	13,576.08	17,781.64	-4,205.56	19,236.80	16,250.39	2,986.41
15-Jul-26	13,207.46	13,943.29	-735.83	16,226.42	15,521.49	704.93

FII & DII TRADING ACTIVITY STOCK F&O

	FII Stock Fut			FII Stock Opt		
Date	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	2,92,194.77	2,90,569.39	1,625.38	3,17,725.04	3,18,781.88	-1,056.84
20-Jul-26	23,001.01	22,555.03	445.98	34,849.72	34,618.93	230.79
17-Jul-26	25,862.78	24,945.75	917.03	27,894.29	27,752.39	141.9
16-Jul-26	21,170.84	19,862.35	1,308.49	22,439.85	22,885.60	-445.75
15-Jul-26	19,032.90	20,896.96	-1,864.06	20,922.56	21,378.95	-456.39

TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Telecom-Handsets/Mobile	2.97	8.69	30.62	42.17	33.18	-5.92
Paints/Varnish	2.01	-0.02	-3.14	3.09	-11.16	-15.1
Petrochemicals	1.8	-2.84	-1.26	14.22	13.99	-16.09
Alcoholic Beverages	1.55	0.36	2	0.87	4.73	-2.93
Ship Building	1.54	0.02	12.08	26.31	28.59	378.11

*Data in above table is based on previous day closing bases

Result calendar for F&O stocks

20-07-2026	21-07-2026	22-07-2026	23-07-2026	24-07-2026
ULTRACEMCO	ADANIENSOL	NESTLEIND	INFY	KFINTECH
PAYTM	BAJAJ-AUTO	DRREDDY	MPHASIS	BANKBARODA
	TVSMOTOR	NAM-INDIA	CIPLA	CONCOR
	INDHOTEL	ADANIPOWER	SONACOMS	LAURUSLABS
	BANDHANBNK	ADANIGREEN	IEX	JINDALSTEL
		INDUSINDBK		SBILIFE
		UNITDSPR		CGPOWER
		HINDPETRO		SHRIRAMFIN
		BPCL		
		OFSS		
		ETERNAL		
		SRF		

UPCOMING ECONOMIC EVENTS

Wednesday, 22 July 2026	Country	Event’s	Forecast		Previous
11:30	UK	CPI (YoY) (Jun)	2.7%		2.8%
20:00	US	Crude Oil Inventories			-1.692M
Thursday, 23 July 2026					
17:45	EU	ECB Interest Rate Decision (Jul)	2.40%		2.40%
17:45	EU	Deposit Facility Rate (Jul)	2.25%		2.25%
18:00	US	Initial Jobless Claims	211K		208K
18:15	EU	ECB Press Conference			
Friday, 24 July 2026					
10:30	IN	S&P Global Services PMI (Jul)			57.40
10:30	IN	S&P Global Manufacturing PMI (Jul)			54.20
17:00	IN	FX Reserves, USD			674.19B
19:15	US	S&P Global Manufacturing PMI (Jul)	54.50		53.90

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