EQUITY WEEKLY REPORT

SHRIRAM Insight
HAR HAATH MEIN DHAN KI REKHA

18th JuLY 2026

Market Snapshot

KEY INDICES	17-JuL-26	10-JuL-26	%Ch
S&P CNX NIFTY	24334.30	24206.90	**0.53**
SENSEX	78151.45	77569.39	**0.75**
NIFTY MIDCAP 100	62428.05	63036.80	**-0.97**
NIFTY SMLCAP 100	19296.30	19416.50	**-0.62**

(Source: Capitaline, Investing.com)

Sectoral Snapshot

KEY INDICES	17-JuL-26	10-JuL-26	%Ch
NIFTY BANK	58521.40	58045.90	**0.82**
NIFTY AUTO	27099.75	26860.75	**0.89**
NIFTY FMCG	48748.70	49310.60	**-1.14**
NIFTY IT	29226.60	28010.35	**4.34**
NIFTY METAL	12436.95	12688.90	**-1.99**
NIFTY PHARMA	25645.00	25674.10	**-0.11**
NIFTY REALTY	918.70	938.60	**-2.12**
BSE CG	78121.89	79102.08	**-1.24**
BSE CD	63383.37	62002.68	**2.23**
BSE Oil & GAS	26536.71	26323.04	**0.81**
BSE POWER	7786.48	7831.63	**-0.58**

(Source: Investing.com)

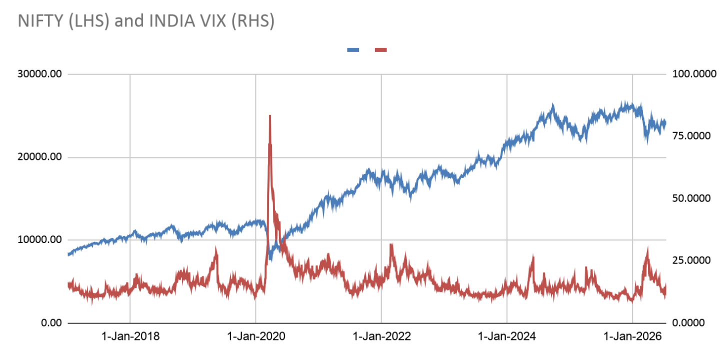
FII & DII Activities (Rs Crore)

10/07/2026 to 17/07/2026

Activities	FIIs	DIIs
Buy	86649.27	107629.38
Sell	89644.18	95801.06
Net	**-2994.91**	**11828.32**

(Source: Capitaline)

Nifty Vs. INDIA VIX



(Source: NSE)

Benchmarks end with major gains; Nifty ends above 24,300 level

Indian equity benchmarks ended the week with solid gains, supported by strong quarterly earnings from several major companies, particularly in the IT and financial sectors. Positive global cues, including softer U.S. inflation data and expectations of a less aggressive monetary policy stance, boosted investor sentiment. The India-UK trade agreement further improved optimism over export growth and economic opportunities. However, gains were capped by concerns over rising inflation, a widening trade deficit and delayed monsoon progress, which raised concerns over food prices and rural demand.

In the week ended on Friday, 17 July 2026, the S&P BSE Sensex jumped 582.06 points or 0.75% to settle at 78,151.45. The Nifty 50 index added 127.4 points or 0.52% to settle at 24,334.30. The BSE 150 Mid-Cap index shed 0.05% to close at 16,992.46. The BSE 250 Small-Cap index fell 0.80% to close at 7,095.60.

India's trade deficit widened to $30.43 billion in June 2026, compared with $19.10 billion in June 2025 and $28.21

Sensex Gainers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
TCS	2268.25	2069.05	9.63
TECHM	1570.50	1455.45	7.90
HCLTECH	1203.85	1162.65	3.54
BAJFINANCE	1055.70	1020.45	3.45
KOTAKBANK	389.85	377.80	3.19

(Source: Capitaline)

Sensex Losers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
LT	3815.00	3946.55	-3.33
BAJAJFINSV	1859.85	1915.55	-2.91
TATASTEEL	185.90	191.15	-2.75
NESTLEIND	1427.90	1456.65	-1.97
NTPC	341.80	344.50	-0.78

(Source: Capitaline)

Nifty Gainers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
TCS	2269.00	2069.00	9.67
TECHM	1572.90	1454.80	8.12
DIVISLAB	7247.50	6836.00	6.02
UPL	616.60	594.75	3.67
BAJFINANCE	1056.30	1020.50	3.51

(Source: Capitaline)

Nifty Losers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
LT	3814.50	3945.80	-3.33
BAJAJFINSV	1854.00	1916.00	-3.24
GRASIM	3109.70	3213.60	-3.23
TATASTEEL	185.89	191.19	-2.77
DRREDDY	1211.20	1244.30	-2.66

(Source: Capitaline)

billion in May 2026. India's merchandise exports increased 15.5% year-on-year to $40.41 billion in June 2026 from $34.98 billion in the year-ago period. However, imports rose 31% year-on-year to $70.84 billion from $54.08 billion, resulting in a wider trade deficit.

India's retail inflation accelerated to 4.38% in June 2026 from 3.93% in May 2026. The year-on-year inflation rate based on the All India Consumer Food Price Index (CFPI) stood at 5.32% in June 2026, while transport inflation increased to 4.3% from 1.75% in May. India's wholesale price index (WPI)-based inflation rose to 9.87% in June 2026 from 9.68% in May 2026. The June 2026 wholesale inflation data is based on the revised WPI series with 2022-23 as the base year, which aims to better reflect changes in the current economic structure.

The India-United Kingdom Comprehensive Economic and Trade Agreement (CETA), along with the Agreement on Social Security, also known as the Double Contribution Convention (DCC), formally entered into force yesterday, marking a major milestone in the economic partnership between the two countries. In a post on social media, Union Minister of Commerce and Industry Piyush Goyal said that the entry into force of the India-UK Comprehensive Economic and Trade Agreement (CETA) and the Agreement on Social Security marks a defining milestone in India-UK relations. This provides zero-duty market access for nearly 99% of India's exports and covering almost 100 per cent of trade value. The Minister noted that the Agreement creates unprecedented opportunities for sectors including textiles, leather, gems and jewellery, engineering goods, marine products, chemicals and processed foods, while benefiting MSMEs, farmers and manufacturers. He further observed that the Agreement opens new opportunities for India's IT, professional, financial, education and business services sectors and expands mobility for Indian talent.

Nifty Midcap 100 Gainers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
ZEEL	107.40	97.47	10.19
BHEL	422.00	395.25	6.77
DIXON	14329.00	13421.00	6.77
IPCALAB	1900.60	1787.90	6.30
FEDERALBNK	349.00	329.85	5.81

(Source: Capitaline)

Nifty Midcap 100 Losers - Weekly

SCRIPS	17-JuL-26	10-JuL-26	%Ch
PATANJALI	337.70	413.80	-18.39
BALKRISIND	2065.30	2252.90	-8.33
MFSL	1538.00	1633.10	-5.82
DELHIVERY	492.15	520.30	-5.41
TATAELXI	3503.20	3690.30	-5.07

(Source: Capitaline)

World Markets

KEY INDICES	17-JuL-26	10-JuL-26	%Ch
DJIA	52146.42	52637.01	-0.93
NASDAQ	25520.24	26281.61	-2.90
BOVESPA	173714.08	177866.38	-2.33
FTSE 100	10600.37	10497.29	0.98
CAC 40	8338.81	8338.97	0.00
DAX	24830.98	25067.09	-0.94
MOEX RUSSIA	1958.43	2145.65	-8.73
NIKKEI 225	64141.12	68557.73	-6.44
HANG SENG	24562.24	24175.12	1.60
STRAITS TIMES	5509.43	5469.29	0.73
SHANGHAI COMPOSITE	3764.15	3996.16	-5.81
JAKARTA	6175.54	5924.36	4.24

(Source: Capitaline, Investing.com)

Global Markets:

The UK economy expanded 0.1% in May, supported by growth in the services sector despite higher energy costs linked to the Iran conflict.

In China, the economy grew 4.3% year-on-year in the April-June quarter, its weakest pace since the fourth quarter of 2022, according to the National Bureau of Statistics. The reading missed market expectations of 4.5% growth and slowed from 5% in the first quarter, reinforcing calls for additional policy stimulus amid weak investment, subdued consumer demand and ongoing trade tensions with the United States and the European Union.

The U.S. consumer price index (CPI) fell 0.4% in June, marking its first monthly decline since the COVID-19 pandemic. Annual core inflation stood at 2.6%, below market expectations of 2.8%.

(Source: Capitaline)

Outlook and Technical View

Investors will closely monitor the Q1 FY27 earnings season and management commentary for cues on the business outlook for FY27, developments in the US-Iran conflict and the progress of the monsoon, for further market cues. Besides, the movement of rupee against the dollar will also closely track in the near term. Investment by foreign portfolio investors (FPIs) and domestic institutional investors (DIIs) will be closely monitored.

From the technical standpoint, Nifty may find support at 24167, 23999, 23899, 23782 while levels of 24435, 24535, 24702,24852 may act as resistance with pivot point at 24267.

(Source: Capitaline)

Derivative Weekly Wrap

OPEN INTEREST DETAILS

Symbol	Expiry Date	LTP	Pr. LTP	Ch.	Premium/discount	OI	Prev. OI	Ch. in OI
NIFTY	28-Jul-26	24345.00	24249.90	**0.39%**	**10.70**	585237	665379	**-12.04%**
BANKNIFTY	28-Jul-26	58599.80	58234.60	**0.63%**	**78.40**	133778	143224	**-6.60%**

(Source: NSE)

COST OF CARRY

Positive

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
JUBLFOOD	417.15	419.00	28-Jul-26	**14.72%**
BAJAJ-AUTO	10443.00	10485.50	28-Jul-26	**13.50%**
PFC	404.85	406.30	28-Jul-26	**11.88%**
EXIDEIND	435.20	436.75	28-Jul-26	**11.82%**
CANBK	125.01	125.45	28-Jul-26	**11.68%**
COLPAL	2042.40	2049.50	28-Jul-26	**11.54%**
ICICIBANK	1444.30	1449.10	28-Jul-26	**11.03%**
ICICIPRULI	497.15	498.80	28-Jul-26	**11.01%**
DRREDDY	1211.20	1215.20	28-Jul-26	**10.96%**
MFSL	1538.00	1543.00	28-Jul-26	**10.79%**

(Source: NSE)

Negative

Symbol	Spot Price	Future Price	Expiry Date	Cost of Carry
HEROMOTOCO	4909.90	4835.20	28-Jul-26	**-50.48%**
WIPRO	176.00	173.98	28-Jul-26	**-38.08%**
DLF	667.80	660.20	28-Jul-26	**-37.76%**
BHARTIARTL	1908.80	1891.10	28-Jul-26	**-30.77%**
INFY	1096.50	1090.00	28-Jul-26	**-19.67%**
GODREJPROP	2102.10	2091.10	28-Jul-26	**-17.36%**
RECLTD	355.10	353.50	28-Jul-26	**-14.95%**
PIDILITIND	1566.10	1559.70	28-Jul-26	**-13.56%**
SIEMENS	3658.80	3645.00	28-Jul-26	**-12.52%**
NAUKRI	1187.25	1183.70	28-Jul-26	**-9.92%**

(Source: NSE)

PUT CALL-RATIO

Symbol	PUT	CALL	RATIO
NIFTY	68182270	60521175	**1.13**

(Source: Capitaline)

The following stocks displayed surge in volume during the week and can be one of the triggers for deciding trading/investment stocks:

1. TCS	**2. TECHM**	**3. HCLTECH**	**4. MPHASIS**	**5. INFY**
6. PERSISTENT	**7. SOBHA**	**8. PHOENIXLTD**	**9. DLF**	**10. LODHA**

(Source: Moneycontrol)

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