SAFAL PULSE

# Daily Market Brief

Tuesday, 19th May 2026 · Pre-Market Edition

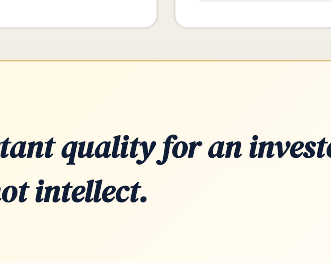
| | |
|---|---|
| GOLD (MCX)<br>1,59,789<br>▲ +0.24% | SILVER (MCX)<br>2,76,480<br>▼ -0.06% |
| BRENT CRUDE<br>$109.84<br>▲ +0.53% | US VIX<br>17.82<br>▼ -3.31% |
| INDIA VIX<br>18.74<br>▼ 4.54% Elevated | ₹ USD / INR<br>₹96.38<br>+0.43% |
| G<br>G-SEC (10Y BOND YIELD)<br>7.12%<br>+5 bps | PE<br>NIFTY PE<br>20.45<br>Valuation Check |

DAILY THOUGHT

*The most important quality for an investor is temperament, not intellect.*

— Warren Buffett

## MARKET SENTIMENT · 19 MAY 2026



65.6

GREED

- Extreme Fear (<30): Good time to open
- Fear (30–50): Wait for direction
- Greed (50–70): Caution on new positions
- Extreme Greed (>70): Avoid opening

| | |
|---|---|
| NIFTY 3-DAY<br>+0.2% | INDIA VIX<br>18.74 ↓ |
| FII CASH<br>+₹2,813.69 Cr | DII CASH<br>+₹2,682.12 Cr |

FII / DII ACTIVITY — 19 MAY 2026

| PARTICIPANT | MARKET | FLOW | SIGNAL |
|---|---|---|---|
| FII | Cash | +₹2,813.69 Cr | BUY |
| DII | Cash | +₹2,682.12 Cr | BUY |

✅ POSITIVE — GREED ZONE

FII inflow ₹2,814 Cr. VIX 18.74 — elevated, reduce size. Ride the trend with trailing stop-losses. Watch for reversal signs near resistance.

NIFTY PE VALUATION

20.45

Reasonable valuation zone; earnings upgrades and steady flows can support upside.

## MARKET OVERVIEW

NIFTY 50

23,732.50

▲ 0.35% (83 pts)

BANK NIFTY

53,540.85

▲ 0.01% (4 pts)

### Indian Indices

| INDEX | CLOSE | CHANGE % |
|---|---|---|
| Sensex | 75,315.04 | +0.10% |
| Nifty 50 | 23,732.50 | +0.35% |
| Nifty Bank | 53,540.85 | +0.01% |
| Nifty Midcap | 60,845.10 | +0.61% |
| GIFT Nifty<br>7:30 AM | 23,649.00 | -0.26% |

### Asian Markets

| INDEX | CLOSE | CHANGE % |
|---|---|---|
| Nikkei 225 | 60,560.00 | -0.42% |
| Hang Seng | 25,765.00 | +0.35% |
| KOSPI | 7,304.71 | -2.81% |
| HSCE (China) | 15,477.59 | -0.53% |

### US Markets (prev. close)

| INDEX | CLOSE | CHANGE % |
|---|---|---|
| S&P 500 | 7,403.05 | -0.07% |
| Nasdaq | 26,090.73 | -0.51% |
| Dow Jones | 49,686.12 | +0.32% |
| US 5Y Yield | 4.27% | +1 bps |
| US 10Y Yield | 4.61% | +2 bps |

### Europe Markets

| INDEX | CLOSE | CHANGE % |
|---|---|---|
| DAX | 24,307.92 | +1.49% |
| CAC 40 | 7,987.49 | +0.44% |
| FTSE 100 | 10,323.75 | +1.26% |

## CRYPTO MARKETS — LIVE PRICES (24H CHANGE)

| B BTC | Ξ ETH | BNB BNB | XRP XRP | ₮ USDT |
|---|---|---|---|---|
| BITCOIN | ETHEREUM | BNB | XRP | TETHER |
| $76,766 | $2,132 | $643.35 | $1.38 | $0.9992 |
| ▼ 0.16% | ▲ 0.72% | ▲ 0.04% | ▼ 0.73% | ▼ 0.02% |

## MARKET ANALYSIS — 19 MAY 2026

WATCH

Nifty trades below 23,400 level; consumer durables shares tumble

CAUTION

Nasdaq leads equity losses with oil, borrowing costs in focus Treat this as a risk filter for position size and sector exposure.

MACRO

Rupee opens 2 paise lower at 96.37 against US dollar Watch rate-sensitive sectors, USD/INR and bond-yield reaction.

MACRO

Stock Market News Today Live Updates: Nifty, Sensex Recover In Pre-Open; Rupee Recovers After Hitting Record Low At Open Watch rate-sensitive sectors, USD/INR and bond-yield reaction.

POSITIVE

Sensex, Nifty gain for third day in a row; easing volatility to support bull trend

POSITIVE

Mid-day Mood | Cooling volatility sparks market rally, India VIX sees steepest fall in 4 years

## GLOBAL RISK MONITOR — WAR & GEOPOLITICS

GLOBAL RISK — REUTERS

Investors bet on stability after Trump-Xi summit as Iran war concerns linger

GLOBAL RISK — THE ECONOMIC TIMES

Global markets this week: War, AI & rising economic risks

GLOBAL RISK — MODERN DIPLOMACY

Iran War Disrupts Hormuz Oil Flow and Raises Questions Over Petrodollar Dominance

## SECTOR SNAPSHOT — 1 DAY CHANGE

| | | |
|---|---|---|
| Nifty IT | 29,496 | +3.91% |
| Nifty FMCG | 51,233 | +0.66% |
| Nifty Pharma | 24,909 | +0.59% |
| Nifty Realty | 756 | +0.55% |
| Nifty PSU Bank | 7,912 | +0.46% |
| Nifty Energy | 39,573 | +0.15% |
| Nifty Bank | 53,575 | +0.08% |
| Nifty Fin Services | 25,361 | +0.03% |
| Nifty Auto | 25,624 | +0.00% |
| Nifty Metal | 13,157 | -0.10% |

## SECTOR SNAPSHOT — 7 DAY CHANGE

| | |
|---|---|
| Nifty IT | +4.48% |
| Nifty Pharma | +4.48% |
| Nifty Metal | +2.13% |
| Nifty FMCG | +1.55% |
| Nifty Fin Services | +0.87% |
| Nifty Energy | +0.09% |
| Nifty Bank | +0.04% |
| Nifty Realty | -1.25% |
| Nifty Auto | -1.98% |
| Nifty PSU Bank | -2.01% |

## TOP GAINERS (NIFTY 500)

| COMPANY | PRICE ₹ | CHG % |
|---|---|---|
| TEJASNET | ₹465.55 | +6.61% |
| FSL | ₹249.09 | +6.49% |
| COHANCE | ₹453.40 | +5.92% |
| COFORGE | ₹1,414.80 | +4.95% |
| INFY | ₹1,195.90 | +4.67% |

## TOP LOSERS (NIFTY 500)

| COMPANY | PRICE ₹ | CHG % |
|---|---|---|
| JAINREC | ₹402.65 | -13.12% |
| UNOMINDA | ₹1,015.00 | -4.94% |
| ASTRAL | ₹1,477.20 | -4.43% |
| TRITURBINE | ₹571.00 | -4.30% |
| AFCONS | ₹305.60 | -3.76% |

## RESULTS TODAY (Q4 FY26)

| COMPANY | TYPE |
|---|---|
| ACE | Results/Div |
| AGIIL | Results/Div/Other |
| AMAGI | Results |
| AMJLAND | Results/Div |
| ANUHPHR | Results/Div/Other |
| APOLLOHOSP | Results/Div/Other |
| APTECHT | Results/Div |
| ARVSMART | Results/Div |
| BCONCEPTS | Results |
| BOROSCI | Results/Fund Raising |

10 companies today: ACE, AGIIL, AMAGI, AMJLAND, ANUHPHR, APOLLOHOSP + 4 more

## CORPORATE ACTIONS TODAY

| COMPANY | ACTION |
|---|---|
| ONWARDTEC<br>ex: 18 May | Buyback |
| INDIGRID<br>ex: 19 May | Dist ₹4/unit (Rs 2.5218 /unit as int./ R |
| MANINFRA<br>ex: 19 May | Int. Div - ₹0.72/sh |
| METROPOLIS<br>ex: 19 May | Int. Div - ₹1/sh |
| ALICON<br>ex: 19 May | Int. Div - ₹2/sh |
| TVSINVIT<br>ex: 19 May | Dist ₹1.58/unit (Rs 1.44 /unit as int./ F |
| IRBIT<br>ex: 19 May | Dist ₹1.70/unit as int |
| IRBINVIT<br>ex: 20 May | Dist ₹1.60 (Rs 1.44 /unit as int./ Re 0.1 |

## Unlisted Shares — 19 May 2026

CURATED BY SAFAL PULSE · PRE-IPO & UNLISTED DESK

UNLISTED SHARES — INDICATIVE PRICES ONLY

**API (pharmeasy)** E-Pharma / Healthtech — INDICATIVE ₹5.5

FV 10 · Lot 10000 · Soft

Continued valuation pressure amid delayed profitability roadmap and weak private market sentiment toward healthtech startups

**Apollo Green** Green Energy — INDICATIVE ₹58

FV 10 · Lot 1000 · Soft

Renewable energy sector gaining momentum with increasing investor interest in clean energy and upcoming IPO activity in the sector

**CSK** Sports Franchise — INDICATIVE ₹295

FV 0.1 · Lot 100 · Rising

Strong retail investor demand continues driven by IPL brand value and scarcity of available shares

**MSEI** Stock Exchange — INDICATIVE ₹6.25

FV 10 · Lot 10000 · Rising

Market participants continue to view MSEI as a long-term turnaround play despite low exchange activity and limited liquidity

**NCDEX** Commodity Exchange — INDICATIVE ₹390

FV 10 · Lot 100 · Rising

Steady accumulation visible as commodity trading activity improves and investor interest gradually returns

**NSE** Stock Exchange — INDICATIVE ₹2000

FV 1 · Lot 100 · Rising

Strong institutional and HNI demand continues ahead of anticipated IPO expectations and dominant market position

**Onix Renewables** Renewable Energy — INDICATIVE ₹68

FV 10 · Lot 1000 · Rising

Onix Renewable continues to attract attention after IPO plans and aggressive valuation targets boosted investor sentiment

**ORBIS** Financial Services — INDICATIVE ₹405

FV 10 · Lot 500 · Stable

Orbis Financial remains tightly held with steady institutional demand and limited floating supply in the market

**Polymatech** Semiconductors — INDICATIVE ₹64

FV 10 · Lot 1000 · Rising

Semiconductor theme and India chip manufacturing push continue driving strong demand in Polymatech shares

**PRISM (OYO)** Hospitality / Travel — INDICATIVE ₹22.75

FV 1 · Lot 1000 · Soft

OYO sentiment improving gradually amid stronger profitability focus and ongoing IPO market speculation

Prices are indicative secondary market prices, not buy/sell recommendations. Verify independently before transacting. Pricing may vary by demand and availability.

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## NIFTY 50 — 23,732.50 ▲ 0.35%

PIVOT LEVELS

| TYPE | R3 | R2 | R1 | PP | S1 | S2 | S3 |
|---|---|---|---|---|---|---|---|
| Standard | 24,170 | 23,933 | 23,791 | 23,554 | 23,413 | 23,176 | 23,034 |
| Fibonacci | 23,933 | 23,788 | 23,699 | 23,554 | 23,410 | 23,320 | 23,176 |

ADVANCE / DECLINE

35 Advances — 16 Declines

| TOP 3 GAINERS | | TOP 3 LOSERS | |
|---|---|---|---|
| TEJASNET · ₹465.6 | +6.6% | JAINREC · ₹402.6 | -13.1% |
| FSL · ₹249.1 | +6.5% | UNOMINDA · ₹1,015.0 | -4.9% |
| COHANCE · ₹453.4 | +5.9% | ASTRAL · ₹1,477.2 | -4.4% |

## BANK NIFTY — 53,540.85 ▲ 0.01%

PIVOT LEVELS

| TYPE | R3 | R2 | R1 | PP | S1 | S2 | S3 |
|---|---|---|---|---|---|---|---|
| Standard | 54,759 | 54,213 | 53,875 | 53,329 | 52,991 | 52,445 | 52,107 |
| Fibonacci | 54,213 | 53,876 | 53,667 | 53,329 | 52,992 | 52,783 | 52,445 |

ADVANCE / DECLINE

12 Advances — 3 Declines

| TOP 3 GAINERS | | TOP 3 LOSERS | |
|---|---|---|---|
| PNB · ₹100.3 | +0.8% | AUBANK · ₹972.7 | -0.6% |
| IDFCFIRSTB · ₹68.1 | +0.8% | KOTAKBANK · ₹389.6 | -0.6% |
| CANBK · ₹125.7 | +0.7% | HDFCBANK · ₹767.5 | -0.2% |

## BROKERAGE RESEARCH HIGHLIGHTS

1. **Bharti Airtel** — Recommended by ICICI Direct — Upside est: 23.33%
   CMP Rs 1905.40 · Target Rs 2350.00 · Report date: 17 May 2026
2. **Alembic Pharma** — Recommended by BOB Capital Markets Ltd. — Upside est: 29.19%
   CMP Rs 784.10 · Target Rs 1013.00 · Report date: 16 May 2026
3. **Solar Industries** — Recommended by ICICI Direct — Upside est: 16.67%
   CMP Rs 17314.00 · Target Rs 20200.00 · Report date: 16 May 2026
4. **Hindustan Aeronautics** — Recommended by ICICI Direct — Upside est: 20.83%
   CMP Rs 4386.20 · Target Rs 5300.00 · Report date: 16 May 2026
5. **Pearl Global** — Recommended by ICICI Direct — Upside est: 34.90%
   CMP Rs 1671.60 · Target Rs 2255.00 · Report date: 16 May 2026

Brokerage Research Highlights are refreshed once weekly from published brokerage research. Not investment advice — please conduct your own due diligence before investing.

## FUTURES & OPTIONS — MOST ACTIVE CONTRACTS

MOST ACTIVE CONTRACTS - INDEX FUTURE

| COMPANY NAME | PRICE | CHANGE % | PREV. CLOSE | VOLUME | OI |
|---|---|---|---|---|---|
| NIFTY | ₹23,732.20 | +0.31% | ₹23,658.00 | 5,731 | 247,778 |
| BANKNIFTY | ₹53,714.40 | +0.02% | ₹53,702.80 | 2,129 | 72,088 |
| NIFTY | ₹23,820.00 | +0.34% | ₹23,740.10 | 716 | 55,511 |
| BANKNIFTY | ₹53,917.40 | +0.03% | ₹53,900.20 | 280 | 18,660 |
| NIFTY | ₹23,924.70 | +0.33% | ₹23,845.20 | 279 | 9,295 |

MOST ACTIVE CONTRACTS - INDEX OPTION

| SCRIPT NAME | PRICE | CHANGE % | PREV. CLOSE | VOLUME | OI |
|---|---|---|---|---|---|
| NIFTY 23700 CE | ₹96.30 | +17.65% | ₹81.85 | 1,032,360 | 196,601 |
| NIFTY 23700 PE | ₹45.95 | -67.01% | ₹139.30 | 898,975 | 271,371 |
| NIFTY 23750 CE | ₹67.65 | +8.85% | ₹62.15 | 857,732 | 179,517 |
| NIFTY 23800 CE | ₹43.35 | -3.34% | ₹44.85 | 826,594 | 233,945 |
| NIFTY 23600 PE | ₹20.55 | -77.83% | ₹92.70 | 671,415 | 252,787 |

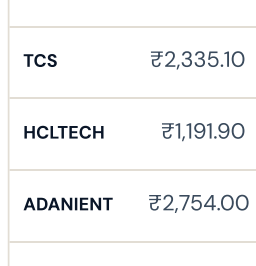
MOST ACTIVE CONTRACTS - STOCK FUTURES

| COMPANY NAME | PRICE | CHANGE % | PREV. CLOSE | VOLUME | OI |
|---|---|---|---|---|---|
| INFY | ₹1,195.40 | +4.40% | ₹1,145.00 | 12,189 | 189,685 |
| TCS | ₹2,335.10 | +3.31% | ₹2,260.30 | 8,369 | 218,468 |
| HCLTECH | ₹1,191.90 | +3.85% | ₹1,147.70 | 4,860 | 122,718 |
| ADANIENT | ₹2,754.00 | +2.30% | ₹2,692.10 | 3,870 | 60,446 |
| COFORGE | ₹1,413.20 | +4.83% | ₹1,348.10 | 3,778 | 42,836 |

MOST ACTIVE CONTRACTS - STOCK OPTIONS

| SCRIPT NAME | PRICE | CHANGE % | PREV. CLOSE | VOLUME | OI |
|---|---|---|---|---|---|
| INFY 1200 CE | ₹18.05 | +305.62% | ₹4.45 | 16,008 | 11,001 |
| TCS 2300 CE | ₹56.95 | +152.55% | ₹22.55 | 10,284 | 5,963 |
| INFY 1180 CE | ₹27.85 | +273.83% | ₹7.45 | 9,372 | 4,568 |
| TCS 2400 CE | ₹16.15 | +166.94% | ₹6.05 | 8,518 | 7,905 |
| COFORGE 1400 CE | ₹38.45 | +170.77% | ₹14.20 | 7,715 | 3,489 |

## WEEKLY PCR — NIFTY 50 & BANKNIFTY



Nifty PCR 1.36 · BankNifty PCR 0.8

**Bullish Setup**

Put writers dominating — support likely to hold. Favour longs on dips.

- ▲ >1.2 — Bullish (Put writers dominant)
- ▼ <0.8 — Bearish (Call writers dominant)
- ↔ 0.8–1.2 — Neutral / Range-bound

WHAT IS PUT-CALL RATIO (PCR)?

PCR compares total Put open interest to Call open interest.

- **PCR above 1** — Put open interest exceeds Call open interest, indicating **support building.**
- **PCR below 1** — Call open interest exceeds Put open interest, indicating **resistance building.**
- **Watch the trend**, not just the value — a rising PCR signals growing caution; a falling PCR signals growing confidence.

## OPTIONS DESK VIEW

Nifty PCR 1.36 · BankNifty PCR 0.80 — bullish — Put writers providing strong support floor. Nifty: Max Call OI 23,800 (resistance) · Max Put OI 23,500 (support). BankNifty: Max Call OI 53,800 · Max Put OI 53,200. Longs can be entered near 23,500 support. Stop-loss below 23,500.

| | |
|---|---|
| MAX PUT OI — SUPPORT<br>23,400<br>Nifty Put Wall | MAX CALL OI — RESISTANCE<br>23,800<br>Nifty Call Wall |
| SUPPORT LEVEL<br>53,200<br>BankNifty Put Wall | RESISTANCE LEVEL<br>53,800<br>BankNifty Call Wall |

BUY ON DIPS — Range: 23,500 – 23,800

TODAY'S TRADING SIGNALS

POSITIVE

Greed zone (65.6). New positions with defined risk. Watch for overbought signals near 23,791.

STABLE VIX

VIX at 18.7 — stable conditions. Normal position sizing. Credit spreads and iron condors viable strategies.

PUT HEAVY

PCR 1.36 — strong Put writing signals market expects support. Good setup for positional longs near 23,413.

## STOCKS IN NEWS — 19 MAY 2026

1. BEARISH **Adani:** Adani Group stocks in focus as US Justice Department drops all charges; case closed permanently CMP: ₹2,755.90
2. BULLISH **Indian Oil:** IOC Q4 results: Cons PAT surges 78% YoY to Rs 14,458 crore, revenue rises 7% CMP: ₹131.81
   Investor read: strength matters only if the market rewards the quality of the beat.
3. BULLISH **Solar Industries:** 'Firing on all cylinders': Elara sees 19% upside in Solar Ind; stock up 4% CMP: ₹18,317.00
4. BEARISH **Delhivery:** Delhivery shares drop 6% despite strong Q4; analysts see up to 26% upside CMP: ₹455.75
   Investor read: weak numbers need follow-through checks before calling it a buying opportunity.
5. RESULTS **PN Gadgil:** PN Gadgil hits lower circuit; gold bars, studded jewellery drag Q4 margins CMP: ₹523.20
6. BULLISH **Amber Enterprises:** Amber Enterprises among 5 F&O stocks with a sharp rise in futures open interest CMP: ₹7,098.00
7. BULLISH **ITC:** ITC Share Price Live Updates: ITC Stock Update CMP: ₹310.15
8. BULLISH **MCX:** Gold rate rises on MCX as oil prices ease, dragging dollar after Trump pauses Iran strike CMP: ₹3,363.30
   Investor read: exchange volumes and regulatory tone decide operating leverage.
9. WATCH **Reliance:** Three giants, one market, and trillions at stake CMP: ₹1,335.90

## MARKET READ — WHAT IT MEANS TODAY

1. **Opening setup:** GIFT Nifty is indicating a lower start (84-point discount to last Nifty close). With global tone supportive, avoid treating the gap as a trade by itself; wait for first-15-minute breadth.
2. **Global handover:** Asia is mixed-to-weak with Nikkei -0.42% and Hang Seng +0.35%; US close was S&P 500 -0.07%, Nasdaq -0.51% and Dow +0.32%. If India opens green against weak global cues, confirmation from breadth becomes important.
3. **Institutional read:** FII ₹2,814 Cr inflow vs DII ₹2,682 Cr inflow — institutional confirmation is strong; dips may get bought. This is more useful than index colour alone.
4. **Volatility filter:** India VIX 18.74 and US VIX 17.82; keep size light and prefer hedged trades. A VIX spike after open would make breakouts less reliable and option premiums richer.
5. **Rates read-through:** US 5Y 4.27%, US 10Y 4.61% and India G-Sec 7.12%. Firm yields can pressure high-valuation growth stocks and support a more selective market.
6. **Currency/crude risk:** Brent $109.84 and USD/INR ₹96.38 — crude is inflation-sensitive, rupee is weak, US 10Y is valuation-sensitive, India G-Sec is firm. Watch aviation, paints, OMCs, logistics, autos and import-heavy businesses if crude/rupee pressure extends.
7. **Commodity signal:** Gold ₹1,59,789/10g and Silver ₹2,76,480/kg are useful risk indicators. Rising gold with weak equities usually signals defensive global positioning.
8. **Market structure:** Nifty +0.35%, BankNifty +0.01%, Midcap +0.61% — Index and broader market are broadly aligned; stock selection matters more than index level.
9. **Valuation context:** Nifty PE 20.45. Nifty PE is not stretched versus recent high-valuation zones; earnings quality remains key Prefer companies where earnings quality supports valuation, not just momentum.
10. **Sector lens:** watch banks/NBFCs, autos, real estate, aviation, paints and OMCs for macro read-through. Also track IT/pharma if USD/INR moves sharply. Confirm with breadth, FII/DII follow-through, VIX behaviour and sector leadership before acting.

## FII & DII INSTITUTIONAL ACTIVITY

CASH MARKET

| | | |
|---|---|---|
| FII | BUY | ₹2,814 Cr |
| DII | BUY | ₹2,682 Cr |

NIFTY ADVANCE / DECLINE

| | |
|---|---|
| Advancing | 35 stocks |
| Declining | 16 stocks |

69% advancing

BANKNIFTY ADVANCE / DECLINE

| | |
|---|---|
| Advancing | 12 stocks |
| Declining | 3 stocks |

80% advancing

## UPCOMING MARKET HOLIDAYS

| DATE | HOLIDAY |
|---|---|
| 28 May 2026<br>THURSDAY | Bakri Id<br>Market holiday |
| 26 Jun 2026<br>FRIDAY | Muharram<br>Market holiday |
| 15 Aug 2026<br>SATURDAY | Independence Day<br>Market holiday |
| 14 Sep 2026<br>MONDAY | Ganesh Chaturthi<br>Market holiday |

## IPO WATCH

LISTINGS TODAY

No listings scheduled today.

LIVE IPOS

**NFP Sampoorna Foods**
SME · 18 May–20 May · Rs 52–55 · Lot 2000 · 0.42x subscribed

**Teamtech Formwork Solutions**
SME · 19 May–21 May · Rs 61–63 · Lot 2000 · Open now

UPCOMING IPOS

**Harikanta Overseas** — SME · 20 May

**Truhome Finance** — Mainboard · Dates awaited

**Marri Retail** — Mainboard · Dates awaited

**Moneyview** — Mainboard · Dates awaited

**Rentomojo** — Mainboard · Dates awaited

F&O BAN LIST

**Kaynes Technology Ind Ltd**
Prev MWPL 306.09%
Current MWPL 291.38%

**Steel Authority Of India**
Prev MWPL 94.00%
Current MWPL 91.61%

## Market Intelligence

UPDATED DAILY · 7:45 AM IST

MARKET SENTIMENT

Risk-on session. Nifty 23,732.50 (+0.35%), BankNifty 53,540.85 (+0.01%). Sensex +0.10%, Midcap +0.61%. F&G at 65.6 — greed zone, momentum favours bulls.

KEY OBSERVATIONS

FII ₹2,814 Cr inflow · DII ₹2,682 Cr inflow. VIX 18.74 — elevated, near-term risk. PCR 1.36 — Put writers dominant (bullish). Nifty PP: 23,554 | R1: 23,791 | S1: 23,413.

NSE + GLOBAL HIGHLIGHTS

Sector leaders: IT (+3.77%). Sector laggard: Metal (-0.15%). Global cues negative — US S&P500 -0.07%, Nikkei -0.42%. Watch FII flow for direction tomorrow.

WHAT TO WATCH

Nifty: Hold above 23,554 (PP) for bullish bias; break below targets 23,413. BankNifty: Key level 53,541 — direction determines next 200pts move. VIX: Cool below 16 needed for sustained rally. FII buying continuation is the key variable.

TODAY'S MARKET VERDICT

**Greed — Caution on New Longs**

POSITIVE

Confidence 65%

FII buying + moderate VIX = bullish setup. Trail stops; target 23,791. DII ₹2,682Cr buying adds to bull case.

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