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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,380.66	-405.41	-0.77%
S&P 500	7,636.36	-37.16	-0.48%
NASDAQ 100	29,421.55	-86.15	-0.29%
FTSE 100	10,670.06	-141.60	-1.31%
NIKKIE (8:00 AM)	64,589.50	-553.28	-0.85%
HANG SENG (8:00 AM)	24,887.00	-387.96	-1.53%
GOLD	4,458.57	-2.13	-0.05%
SILVER	68.10	-0.55	-0.80%
BRENT OIL	101.19	-0.02	-0.02%
DOLLAR INDEX	98.77	-0.05	-0.05%
USD/INR	95.20	0.04	0.04%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. stocks** closed lower on Wednesday as oil prices surged above $100 a barrel, while Apple declined and Treasury yields rose ahead of key inflation data that could influence interest-rate expectations.

- The **10-year U.S. Treasury yield** climbed to 4.85%, its highest level since late 2023, after the U.S. government's plan to purchase up to $6 billion of longer-maturity debt disappointed investors expecting a larger intervention.

- The **USD/INR** strengthened further to 95.22, adding pressure on the rupee.

- **GIFT Nifty** trading at ~23,497.00 is indicating a muted start for the Indian market on Thursday.

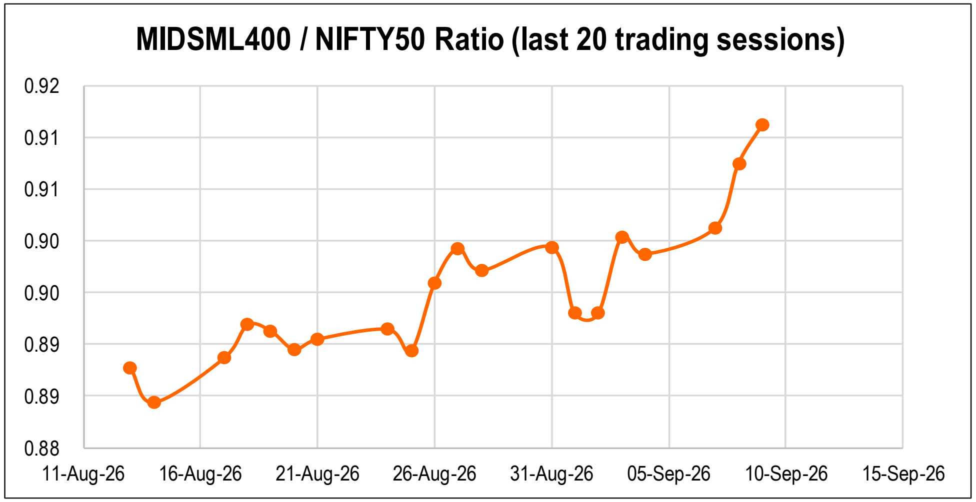
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,431.50	-203.60	-0.86%
SENSEX	74,764.23	-813.35	-1.08%
BANK NIFTY	56,295.55	-482.00	-0.85%
FIN NIFTY	25,376.80	-318.75	-1.24%
NIFTY MIDCAP 100	62,592.80	-323.00	-0.51%
NIFTY SMLCAP 100	20,036.90	-96.85	-0.48%
INDIA VIX	11.98	0.75	6.63%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	13	36	1
NIFTY 500	163	334	3
NIFTY F&O	70	139	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	12	24%
NIFTY 500	187	37%

Highlights

- **Nifty extends losing streak:** The index declined for the fourth consecutive session as gap-down opening was followed by sustained selling.
- **IT remains under pressure:** Selling intensified in the IT segment, with weakness in heavyweight stocks weighing on the broader index. INFY fell 4.34% to emerge as Nifty's top loser.
- **Heavyweights exerting pressure:** With 30 stocks outperforming and 20 underperforming Nifty index on a daily basis, the market breadth remained relatively balanced. Majority of the weakness was driven by heavyweights including INFY, HDFCBANK and BHARTIARTL.



ICICI Bank

ICICI Bank has received approval from the Reserve Bank of India (RBI) permitting ICICI Prudential Asset Management Company, the applicant, to acquire an aggregate holding of up to 9.95 percent of the paid-up share capital or voting rights in CSB Bank, DCB Bank, Kotak Mahindra Bank and AU Small Finance Bank.

IRB Infrastructure Developers

IRB Infrastructure Developers reported a 25 percent year-on-year increase in toll revenue to Rs 807.4 crore in August 2026, from Rs 646.2 crore in the year-ago month.

Wipro

Wipro has launched its Chief Information Security Officer (CISO) Command Center in collaboration with Nasdaq-listed CrowdStrike. The Command Center is designed to strengthen enterprise security against frontier AI-driven risks by enabling proactive, risk-informed cyber resilience aligned with business priorities.

Hindustan Zinc

Hindustan Zinc has signed a six-year transportation contract with logistics solutions provider MFL India for the deployment of 30 electric trucks to transport concentrates, accelerating the electrification of its mine-to-smelter logistics network.

*Source: moneycontrol.com

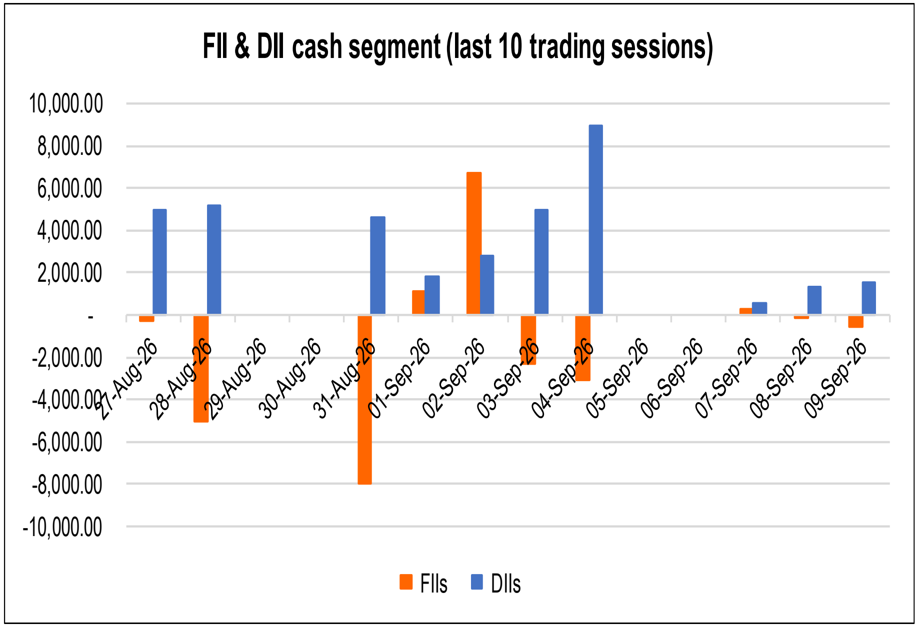
INSTITUTIONAL ACTIVITY

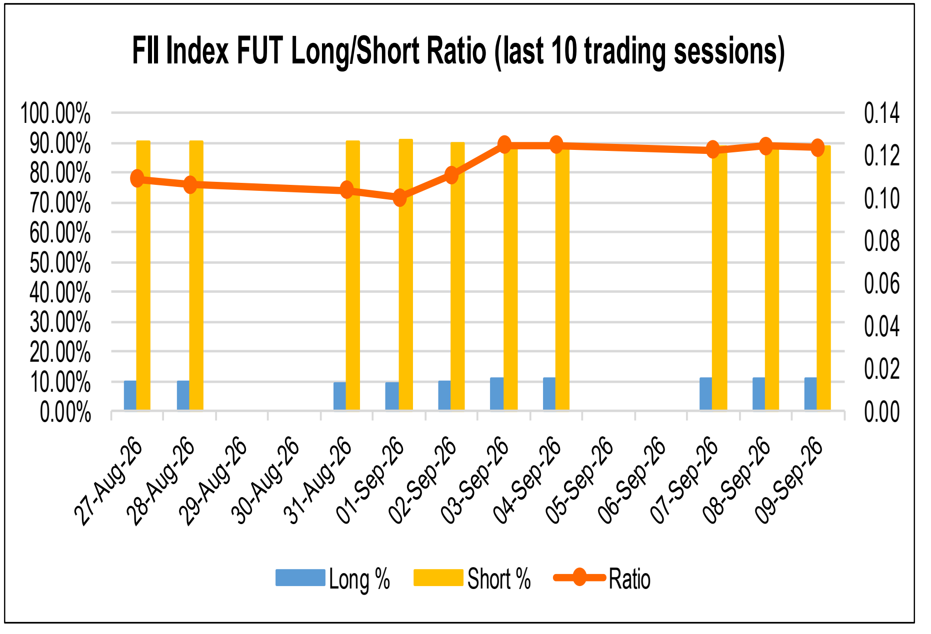
*INR in Crores

Cash Segment	9-Sept-2026	MTD	YTD
FII Net Flows	-582.99	1,947.89	-3,57,106.77
DII Net Flows	1,509.04	21,992.94	5,85,497.50

*INR in Crores

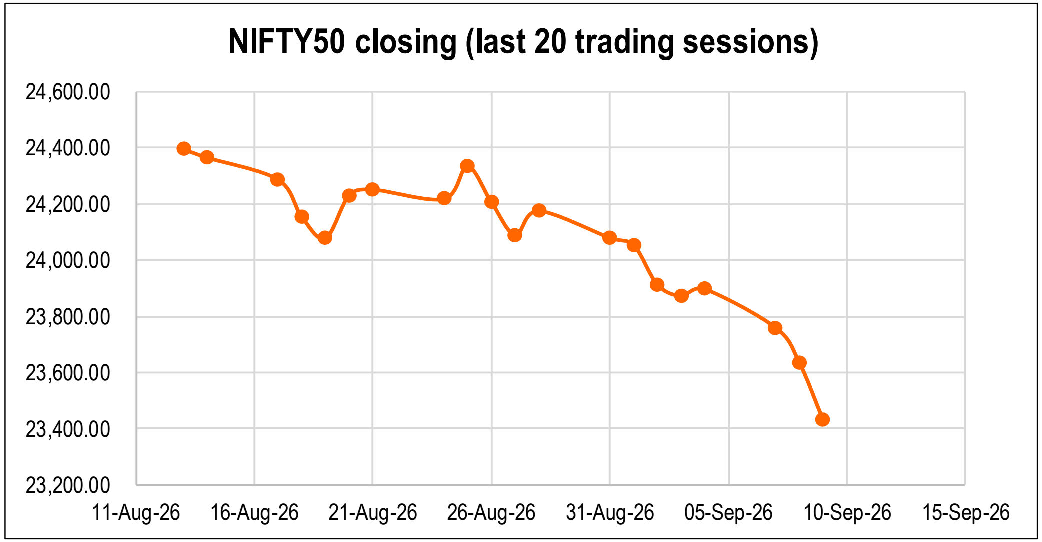
FIIs F&O Flows	9-Sept-2026	MTD
Index Futures	-2,258.08	-10,536.90
Index Options	-4,739.85	-18,615.53
Stock Futures	-1,333.41	-59.86
Stock Options	608.14	969.58



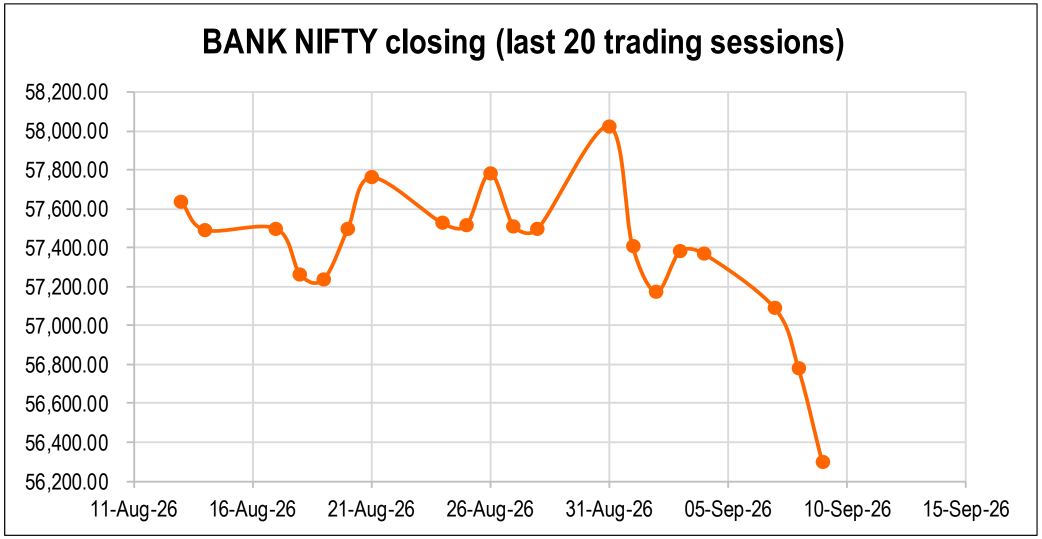


INDEX VIEW

NIFTY	
Spot	23431.50
Futures	23552.20
Highest CE OI (29th SEPT)	24000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.03
Key Supply Zones	23650, 24000
Key Demand Zones	23300, 23000



BANK NIFTY	
Spot	56295.55
Futures	56693.00
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	0.84
Key Supply Zones	56800, 57200
Key Demand Zones	56000, 55500



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Sector-wise Performance

Index	LTP	1 Day	1 Week	1 Month	1 Day vs Nifty50	1 Week vs Nifty50	1 Month vs Nifty50
Nifty India Defence	9,892.10	-1.07%	2.29%	3.11%	Under-performing	Out-performing	Out-performing
Nifty Infrastructure	9,119.50	-0.27%	-0.92%	-2.82%	Out-performing	Out-performing	Out-performing
Nifty Energy	38,333.65	0.63%	0.51%	-0.97%	Out-performing	Out-performing	Out-performing
Nifty Financial Services	25,376.80	-1.24%	-2.11%	-3.99%	Under-performing	Under-performing	Out-performing
Nifty IT	28,913.95	-3.24%	-6.24%	-9.14%	Under-performing	Under-performing	Under-performing
Nifty Realty	872.20	-2.23%	-4.80%	-1.90%	Under-performing	Under-performing	Out-performing
Nifty FMCG	45,309.25	-0.96%	-1.41%	-7.13%	Under-performing	Out-performing	Under-performing
Nifty Pharma	26,691.80	-0.70%	0.12%	-0.22%	Out-performing	Out-performing	Out-performing
Nifty Healthcare	16,581.15	-0.26%	0.17%	-0.74%	Out-performing	Out-performing	Out-performing
Nifty Oil & Gas	11,029.00	-0.14%	-1.21%	-2.22%	Out-performing	Out-performing	Out-performing
Nifty Auto	27,653.35	-0.44%	-0.66%	-6.13%	Out-performing	Out-performing	Under-performing
Nifty Metal	13,391.40	1.79%	1.63%	2.22%	Out-performing	Out-performing	Out-performing
Nifty PSU Bank	8,369.20	-0.51%	-2.14%	-3.14%	Out-performing	Under-performing	Out-performing
Nifty Private Bank	27,214.30	-0.95%	-1.92%	-0.61%	Under-performing	Under-performing	Out-performing
Nifty Bank	56,295.55	-0.85%	-1.89%	-2.00%	Out-performing	Under-performing	Out-performing
Nifty Consumer Durables	38,995.20	-0.58%	-1.66%	-3.24%	Out-performing	Out-performing	Out-performing

Stocks to watch: ADANIPOWER, MAXHEALTH, PAYTM.

Stocks in F&O ban: BANDHANBNK, INOXWIND, KAYNES, LICHSGFIN, MANAPPURAM, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3104.70	5.13	3000.59	3054.19	2517.44
ADANIPORTS	1775.00	3.80	1690.18	1739.93	1607.07
APOLLOHOSP	8967.00	1.47	8780.80	8834.49	7907.44
ASIANPAINT	2489.00	0.30	2605.37	2671.25	2596.98
AXISBANK	1238.50	-0.51	1249.48	1264.55	1288.18
BAJAJ_AUTO	11790.00	-0.76	11839.00	11270.12	10034.07
BAJAJFINSV	1927.00	-0.57	1994.38	1958.89	1905.96
BAJFINANCE	1039.30	-1.40	1073.68	1066.79	978.01
BEL	406.00	-1.11	409.81	406.65	418.95
BHARTIARTL	1814.70	-1.59	1898.14	1918.18	1933.55
CIPLA	1363.10	-1.51	1416.82	1434.53	1391.19
COALINDIA	431.00	2.56	409.14	417.77	429.33
DRREDDY	1145.00	-0.52	1172.50	1199.76	1251.90
EICHERMOT	7734.50	-0.17	7934.15	7774.71	7388.02
ETERNAL	320.60	-0.31	324.08	307.70	274.50
GRASIM	3300.00	-0.21	3292.53	3221.72	2942.53
HCLTECH	1229.80	-3.70	1311.51	1278.11	1385.20
HDFCBANK	687.10	-2.26	716.60	750.07	837.48
HDFCLIFE	514.00	-3.71	540.72	549.41	639.56
HINDALCO	1026.90	1.77	1029.82	1000.23	965.74
HINDUNILVR	1945.00	-1.77	2008.75	2080.05	2220.81
ICICIBANK	1389.10	-0.74	1420.31	1425.38	1356.69
INDIGO	4975.00	-0.50	5141.05	5215.62	4872.66
INFY	1035.00	-4.34	1125.67	1113.85	1306.11
ITC	260.80	-1.02	267.87	277.11	314.20

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	231.00	-0.92	241.21	243.29	255.09
JSWSTEEL	1310.00	0.98	1304.99	1277.53	1226.37
KOTAKBANK	414.00	-1.25	409.54	395.96	400.84
LT	3922.60	-0.60	4031.34	3969.49	3981.97
M&M	3150.00	-0.32	3318.04	3279.49	3330.10
MARUTI	12618.00	-0.18	13340.20	13687.76	14263.03
MAXHEALTH	1037.50	4.48	1005.54	1058.91	1041.15
NESTLEIND	1393.00	-0.54	1451.14	1466.02	1353.20
NTPC	334.50	1.12	334.64	342.12	357.36
ONGC	234.02	-0.84	235.72	240.44	257.27
POWERGRID	265.85	0.04	266.53	276.19	284.23
RELIANCE	1279.00	-1.23	1305.31	1302.72	1387.70
SBILIFE	1684.00	-0.74	1757.61	1810.96	1904.36
SBIN	1000.50	-0.74	1040.47	1040.22	1040.12
SHRIRAMFIN	1029.00	0.00	1090.40	1072.76	994.40
SUNPHARMA	1864.90	-1.11	1909.83	1930.63	1803.99
TATACONSUM	1001.00	-1.29	1043.48	1074.99	1126.82
TATASTEEL	188.75	2.50	185.43	186.81	192.54
TCS	2208.00	-2.11	2306.64	2283.48	2596.52
TECHM	1508.00	-3.27	1596.77	1572.55	1518.42
TITAN	5005.00	0.36	5066.59	4875.89	4330.58
TMPV	303.00	-1.13	317.26	329.63	349.14
TRENT	2820.00	0.95	2895.33	2953.25	2780.67
ULTRACEMCO	10900.00	-0.99	11458.85	11682.46	11757.59
WIPRO	167.00	-2.62	178.56	179.08	208.35

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