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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	46,677.85	-739.42	-1.56%
S&P 500	6,672.62	-103.18	-1.52%
NASDAQ 100	24,533.58	-431.42	-1.73%
FTSE 100	10,305.15	-48.62	-0.47%
NIKKEI (8:00 AM)	53,835.50	-617.46	-1.13%
HANG SENG (8:00 AM)	25,636.00	-80.76	-0.31%
GOLD	5,122.64	-3.16	-0.06%
SILVER	85.07	-0.05	-0.06%
BRENT OIL	100.71	0.25	0.25%
DOLLAR INDEX	99.73	-0.03	-0.03%
USD/INR	92.46	0.09	0.10%

*Closed

*Source: investing.com, moneycontrol.com

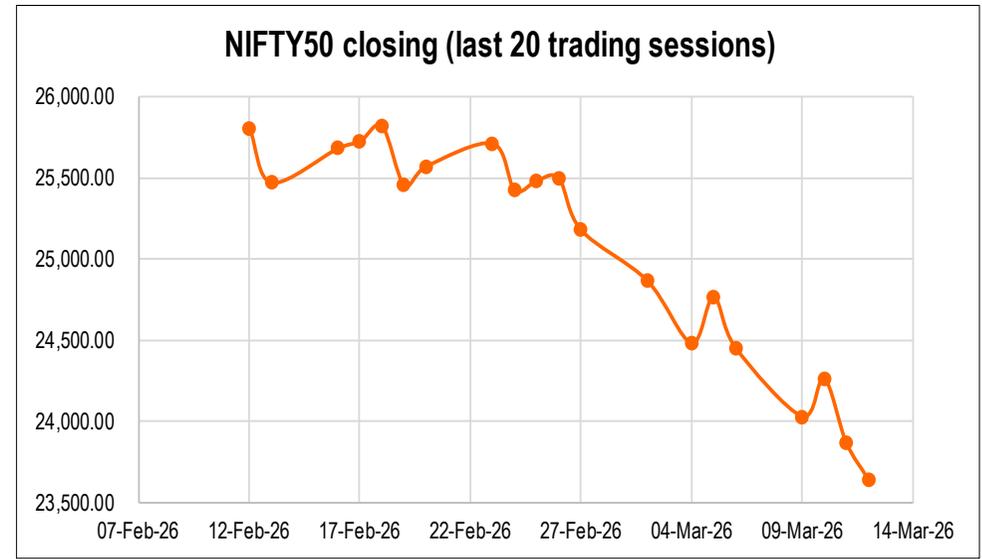
Global updates

- **U.S. equities** declined on Thursday as Iranian strikes on oil tankers triggered a sharp surge in crude prices, intensifying inflation concerns and prompting investors to move away from equities.
- **Brent Crude** jumped nearly 9%, reclaiming the \$100 per barrel mark amid escalating tensions involving Iran.
- **The U.S. dollar** maintained its strength and is on track for its second consecutive weekly gain since the start of the Iran conflict, as investors continued to seek safe-haven assets. **INR** depreciated further to its all-time low of 92.47 against the USD on Thursday.
- **GIFT Nifty** trading at ~23,516.00 is indicating a negative start for the Indian market on Friday.

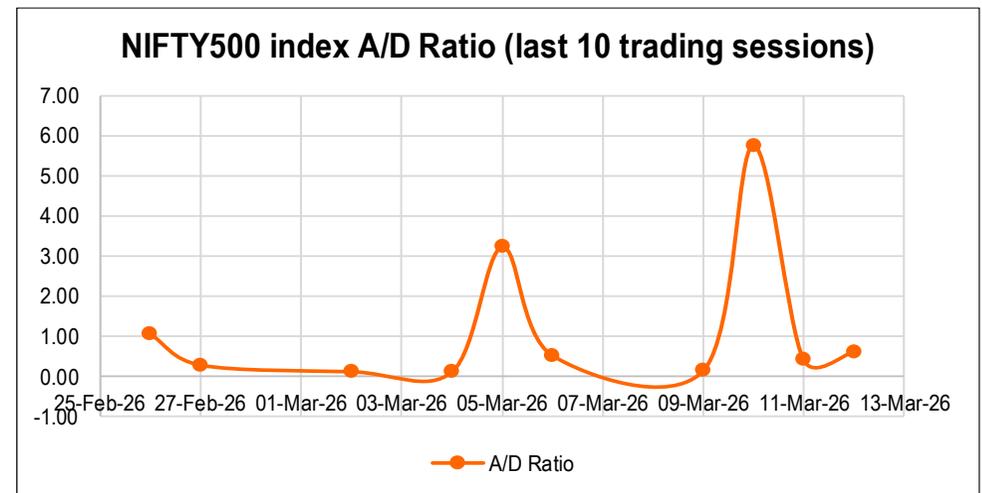


MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,639.15	-227.70	-0.95%
SENSEX	76,057.69	-806.02	-1.05%
BANK NIFTY	55,100.95	-634.80	-1.14%
FIN NIFTY	25,663.20	-257.60	-0.99%
MIDCAP NIFTY	12,961.15	-0.75	-0.01%
NIFTY SMLCAP 250	15,266.45	-60.15	-0.39%
INDIA VIX	21.43	0.37	1.74%



INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	10	40	0
NIFTY 500	191	308	1
NIFTY F&O	63	142	1





Kalpataru

The company has signed a redevelopment project of Shree Mahalakshmi CHS at Andheri West, Mumbai. The project spans around 3 acres of prime land with a total potential carpet area of 0.4 msf and an estimated gross development value (GDV) of around Rs 1,400 crore.

Gravita India

The recycling company has signed definitive agreements for the acquisition of a 98.95 percent stake in Rashtriya Metal Industries for Rs 559.08 crore. The transaction is expected to be closed by March 31, 2026.

KPI Green Energy

The company has energised an additional 35 MWp of solar capacity, taking its total operational IPP capacity to 589 MWp.

Balaji Amines

Balaji Amines is currently experiencing significant logistics disruptions in the procurement of ammonia, one of the key raw materials used in the manufacture of methylamines, ethylamines, and their derivatives, due to the ongoing war in the Middle East region. The situation has arisen due to the non-availability of ammonia. The disruption has adversely affected the supply of Liquefied Natural Gas (LNG)—a key input used for the production of ammonia by most fertiliser manufacturers in India. Consequently, several ammonia manufacturers have expressed their inability to supply the product during this period due to force majeure conditions. Therefore, some of the company's plants are presently non-operational. At present, the financial and operational impact of the shortage of this key raw material cannot be estimated.



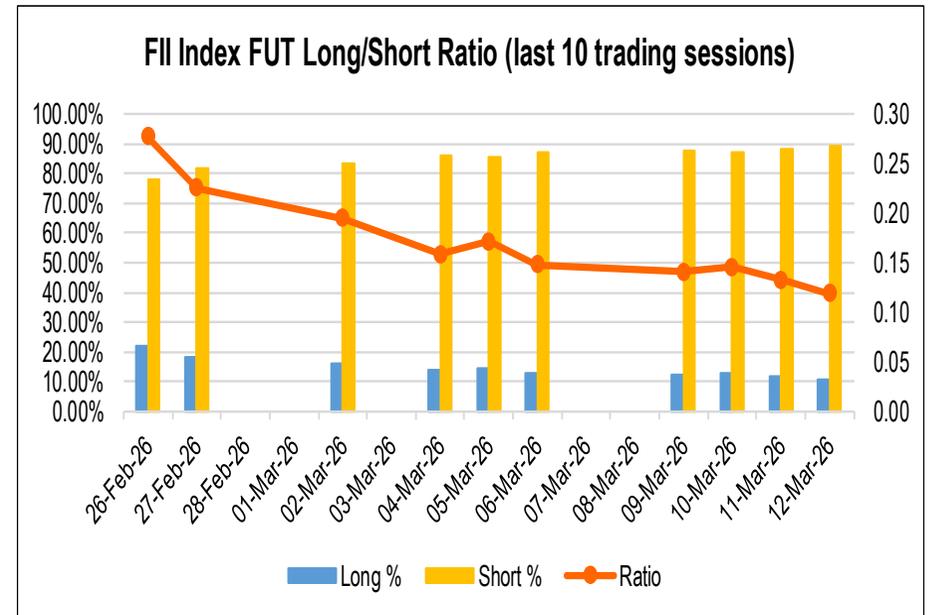
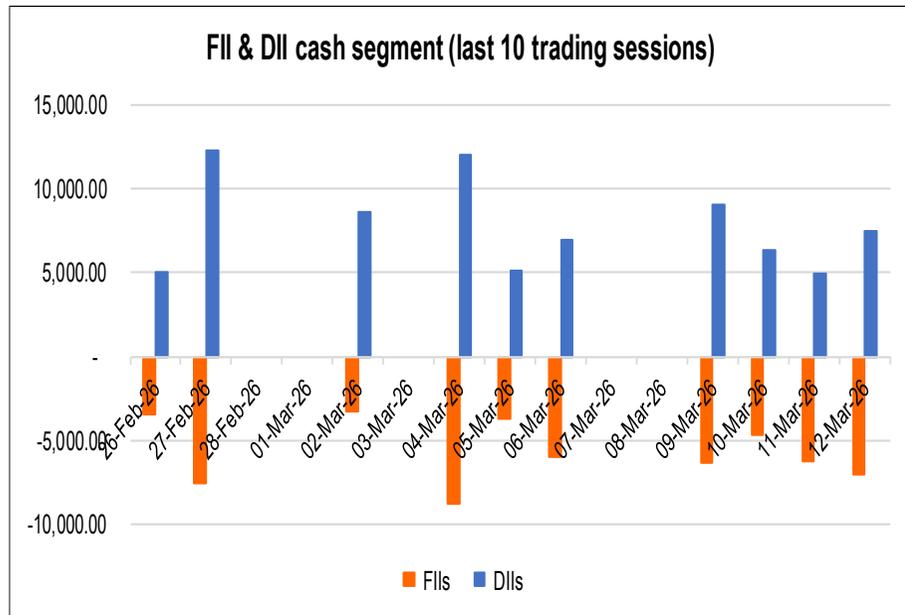
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	12-3-2026	MTD	YTD
FII Net Flows	-7,049.87	-46,166.58	-94,242.58
DII Net Flows	7,449.77	60,549.28	1,68,193.13

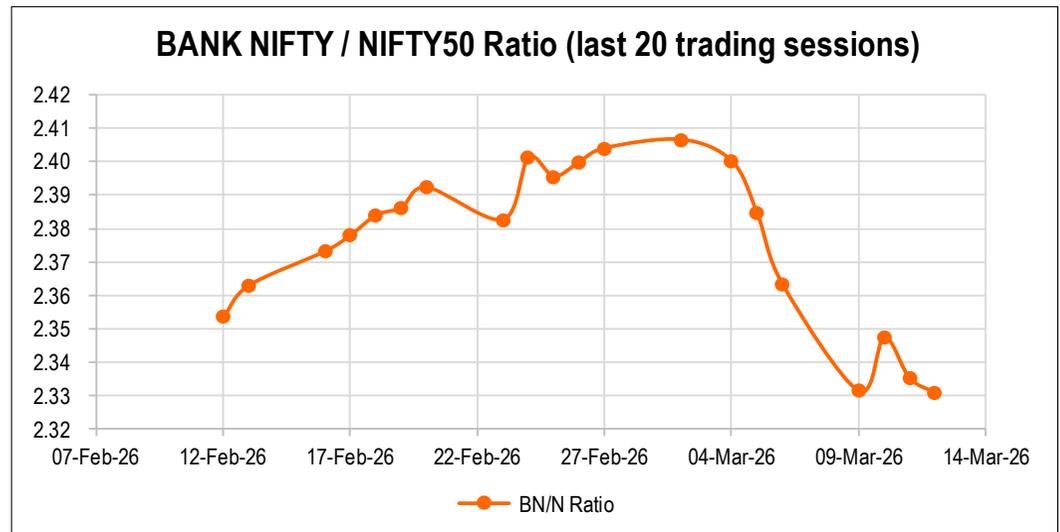
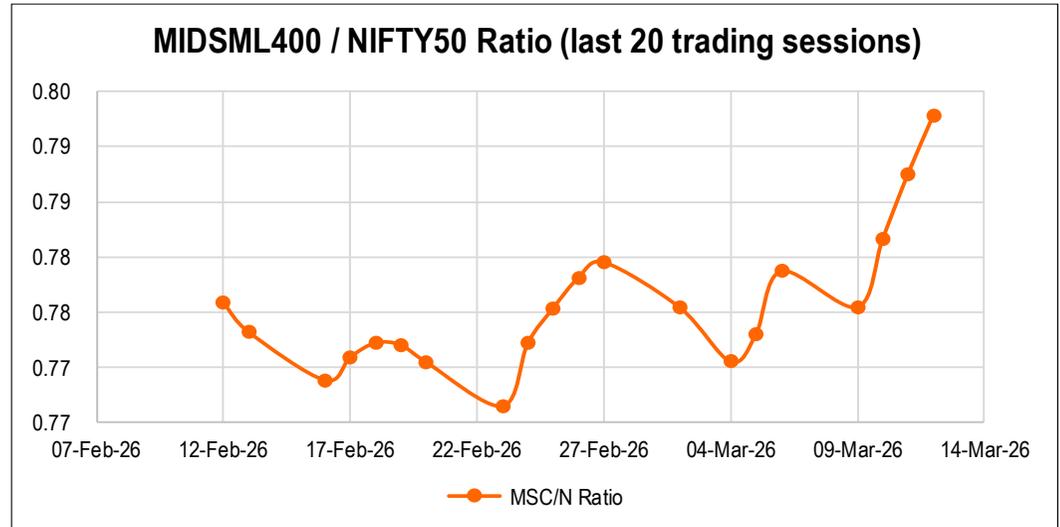
*INR in Crores

FII F&O Flows	12-3-2026	MTD
Index Futures	-3,107.98	-16,392.11
Index Options	-11,324.96	-80,659.45
Stock Futures	-163.59	-2,527.88
Stock Options	-75.99	-367.04



NIFTY	
Spot	23639.15
Futures	23718.00
Highest CE OI (30 th MAR)	26000
Highest PE OI (30 th MAR)	23000
PCR (30 th MAR)	1.09
Key Supply Zones	23800, 24000
Key Demand Zones	23550, 23300

BANK NIFTY	
Spot	55100.95
Futures	55438.60
Highest CE OI (30 th MAR)	61000
Highest PE OI (30 th MAR)	59000
PCR (30 th MAR)	0.79
Key Supply Zones	55650, 56300
Key Demand Zones	54750, 54500





Index Trading View

- **Nifty:** A doji candle formation indicates temporary exhaustion among sellers, opening the possibility of a short-term bounce towards 24,000 on Friday. However, the broader trend is likely to remain bearish as long as the index trades below this level.
- **Bank Nifty:** The index is approaching its 100-week SMA, which has historically acted as a strong support over the past 3-4 years. An initial range of 54,750-55,650 is expected, and a breakout on either side may provide clarity on the next directional move. Bears are likely to retain the upper hand while the index trades below 56,000.

Stocks in Bullish Momentum

JINDALSTEEL, NTPC.

Stocks in Bearish Momentum

VBL, PPLPHARMA.

Stocks in F&O ban list

SAIL, SAMMAANCAP.



SECTORAL BREADTH

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Energy	36,834.35	1.93%	1.55%	3.15%	4.27%
Nifty Oil & Gas	11,538.30	0.48%	-2.32%	-3.66%	-5.67%
Nifty Metal	11,863.90	0.35%	-1.54%	-0.07%	6.23%
Nifty Media	1,349.15	0.33%	-0.98%	-7.77%	-6.61%
Nifty PSU Bank	8,846.05	-0.03%	-5.62%	-3.50%	3.67%
Nifty IT	29,579.45	-0.24%	-1.82%	-9.49%	-21.92%
Nifty Pharma	23,275.20	-0.31%	1.17%	4.87%	2.43%
Nifty Consumer Durables	36,038.25	-0.48%	-1.94%	-4.20%	-1.95%
Nifty Infrastructure	8,995.40	-0.49%	-3.48%	-5.73%	-6.46%
Nifty Healthcare	14,870.15	-0.60%	0.11%	3.38%	1.57%
Nifty Financial Services	25,663.20	-0.99%	-5.77%	-8.76%	-7.06%
Nifty Bank	55,100.95	-1.14%	-6.70%	-8.45%	-7.52%
Nifty Private Bank	26,056.65	-1.60%	-7.12%	-9.18%	-9.28%
Nifty Realty	719.50	-1.63%	-5.05%	-12.64%	-18.05%
Nifty FMCG	48,189.15	-1.77%	-3.62%	-5.33%	-13.13%
Nifty Auto	25,098.00	-3.19%	-8.29%	-11.11%	-10.97%

Sector Analysis

- **Crude** above \$100 is negative for India's macro outlook, increasing inflationary pressures, fiscal strain, and the import bill.
- **Nifty FMCG** index has slipped below the key swing low of 49,350 and continues to trade under its 20-day SMA, indicating persistent weakness. With no visible signs of recovery, the index appears to be in a sell-on-rise mode for the coming weeks.
- **Nifty Auto** index witnessed strong follow-through selling on Thursday after breaking below the 26,000 support zone earlier. From current levels, it appears vulnerable to an extended correction of 3-4%, with 24,200 likely to act as the next major support.
- **Nifty Energy** index saw robust buying interest on Thursday, once again testing the resistance zone near 37,000. A decisive breakout above this level could trigger fresh bullish momentum, while 35,500 is expected to act as a strong support.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2002.00	1.38	2129.56	2138.06	2318.04
ADANIPTS	1391.50	-1.37	1499.27	1471.50	1438.29
APOLLOHOSP	7574.50	-1.43	7687.35	7336.40	7403.11
ASIANPAINT	2221.20	-0.48	2350.84	2517.97	2517.70
AXISBANK	1234.50	-1.70	1346.41	1323.50	1212.76
BAJAJ_AUTO	9162.00	-1.77	9754.27	9622.20	8958.23
BAJAJFINSV	1770.80	-1.36	1968.71	1984.64	2016.44
BAJFINANCE	863.10	-3.42	983.84	966.06	968.16
BEL	453.55	-0.12	447.70	432.46	408.47
BHARTIARTL	1801.30	-0.32	1929.98	1986.12	1977.84
CIPLA	1324.30	-0.39	1335.59	1370.52	1485.72
COALINDIA	470.10	5.23	431.94	428.86	397.18
DRREDDY	1319.00	-0.49	1295.44	1251.66	1263.55
EICHERMOT	6975.50	-3.83	7796.60	7483.52	6638.06
ETERNAL	221.17	-1.18	254.62	270.66	291.45
GRASIM	2673.10	-2.28	2814.44	2818.67	2784.38
HCLTECH	1358.10	0.58	1400.51	1554.83	1563.37
HDFCBANK	832.75	-0.14	889.80	921.26	969.53
HDFCLIFE	645.70	-0.34	700.53	720.23	754.19
HINDALCO	969.75	1.11	933.02	938.33	790.68
HINDUNILVR	2136.90	-1.13	2290.48	2346.34	2403.30
ICICIBANK	1266.50	-2.17	1369.28	1378.19	1398.52
INDIGO	4251.70	-2.28	4697.51	4800.33	5441.40
INFY	1265.80	-0.82	1322.74	1497.17	1528.59
ITC	304.10	-1.59	316.84	325.37	389.17

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	242.20	1.47	252.06	265.23	297.85
JSWSTEEL	1172.60	-0.53	1236.19	1213.31	1119.22
KOTAKBANK	375.30	-2.06	412.22	418.66	418.84
LT	3719.50	-3.11	4129.14	4039.55	3820.82
M&M	3031.20	-4.32	3385.70	3518.94	3434.28
MARUTI	13011.00	-3.60	14598.90	15281.86	14725.70
MAXHEALTH	1020.40	-1.14	1067.94	1035.75	1140.69
NESTLEIND	1220.80	-1.05	1278.22	1293.30	1230.31
NTPC	390.55	2.80	375.31	359.65	340.04
ONGC	270.55	-0.07	274.51	260.59	246.76
POWERGRID	303.60	1.61	298.87	280.03	283.11
RELIANCE	1392.20	0.14	1408.36	1435.45	1448.97
SBILIFE	1939.40	0.04	2015.53	2031.39	1912.49
SBIN	1085.20	-0.54	1178.98	1098.47	924.99
SHRIRAMFIN	1031.70	0.00	1055.92	1024.41	784.47
SUNPHARMA	1825.30	-0.03	1755.08	1712.70	1690.78
TATACONSUM	1057.80	-1.45	1134.15	1153.39	1128.82
TATASTEEL	193.47	-0.65	204.19	195.51	173.23
TCS	2442.40	-0.91	2618.76	2936.60	3115.37
TECHM	1349.80	1.15	1406.74	1557.02	1535.87
TITAN	4129.60	-0.26	4238.08	4162.26	3759.07
TMPV	324.55	-3.22	366.93	362.06	391.82
TRENT	3533.60	-2.59	3931.68	3968.20	4762.11
ULTRACEMCO	11089.00	-3.25	12477.00	12424.24	12130.14
WIPRO	202.51	0.14	204.74	230.84	246.84

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