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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,621.48	-48.62	-0.09%
S&P 500	7,718.94	-86.51	-1.11%
NASDAQ 100	29,950.82	-618.67	-2.02%
FTSE 100	10,724.86	74.53	0.70%
NIKKEI (8:00 AM)	64,493.50	-3,250.79	-4.80%
HANG SENG (8:00 AM)	24,027.00	-287.17	-1.18%
GOLD	4,165.55	57.65	1.40%
SILVER	56.24	0.36	0.64%
BRENT OIL	104.43	-1.63	-1.54%
DOLLAR INDEX	101.82	-0.53	-0.51%
USD/INR	95.31	0.16	0.16%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **U.S. 10-year Treasury yield** fell 5.8 basis points to 5.12%, easing from recent highs.
- **The dollar** slipped from its 18-month peak despite hotter-than-expected U.S. inflation, as lower Treasury yields and cautious Fed comments reduced expectations of an October rate hike.
- The **Nasdaq** closed sharply lower on Wednesday as inflation concerns weighed on chipmakers and AI stocks, including Oracle and CoreWeave.
- **Asian markets** opened lower on Thursday as stronger U.S. inflation data revived concerns over monetary tightening and weighed on investor sentiment.
- **GIFT Nifty** trading at ~22,640.00 is indicating a negative start for the Indian market on Thursday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,622.70	-99.25	-0.44%
SENSEX	72,781.89	-251.89	-0.34%
BANK NIFTY	55,316.00	-165.05	-0.30%
FIN NIFTY	24,948.70	-279.85	-1.11%
NIFTY MIDCAP 100	59,409.10	-50.10	-0.08%
NIFTY SMLCAP 100	19,384.80	-62.60	-0.32%
INDIA VIX	14.62	0.50	3.51%

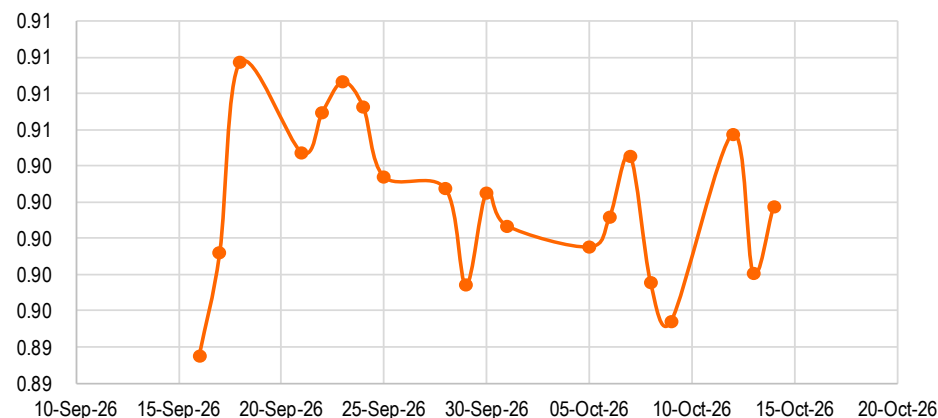
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	16	34	0
NIFTY 500	240	260	0
NIFTY F&O	94	119	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	11	22%
NIFTY 500	123	25%

Highlights

- Nifty faced resistance near the 22,800 mark on Wednesday and closed at 22,622.70.
- Buying momentum continued in the IT segment, while the FMCG index extended its gains for the second consecutive session. NESTLEIND (+3.69%) and TATACONSUM (+2.91%) emerged as the top gainers on the Nifty.

MIDSM400 / NIFTY50 Ratio (last 20 trading sessions)





Reliance Industries (RIL)

Jio Platforms, a subsidiary of Reliance Industries, will open its Rs 30,187.6-crore initial public offering (IPO) for public subscription on October 21 and close the issue on October 23. The price band has been fixed at Rs 1,065–1,119 per share. The IPO comprises a fresh issue of 27 crore equity shares. The issue includes a reservation of shares worth up to Rs 500 crore for eligible employees of Jio Platforms and shares worth up to Rs 2,500 crore for eligible shareholders of Reliance Industries. The one-day anchor book will open on October 19.

Dr Reddy's Laboratories

The United States Food and Drug Administration (USFDA) has completed a pre-approval inspection (PAI) at the company's FTO-9 manufacturing facility in Visakhapatnam, Andhra Pradesh, and issued a Form 483 containing three observations. The inspection was conducted on October 8 and 9, 2026.

Laurus Labs

Laurus Labs has invested Rs 107.8 crore in KRKA Pharma, a joint venture between Slovenia-based KRKA d.d., Novo mesto, and Laurus Labs, through a rights issue. Following the investment, Laurus Labs' shareholding in KRKA Pharma stands at 26.21 crore equity shares, while its ownership stake remains unchanged at 49%.

City Union Bank

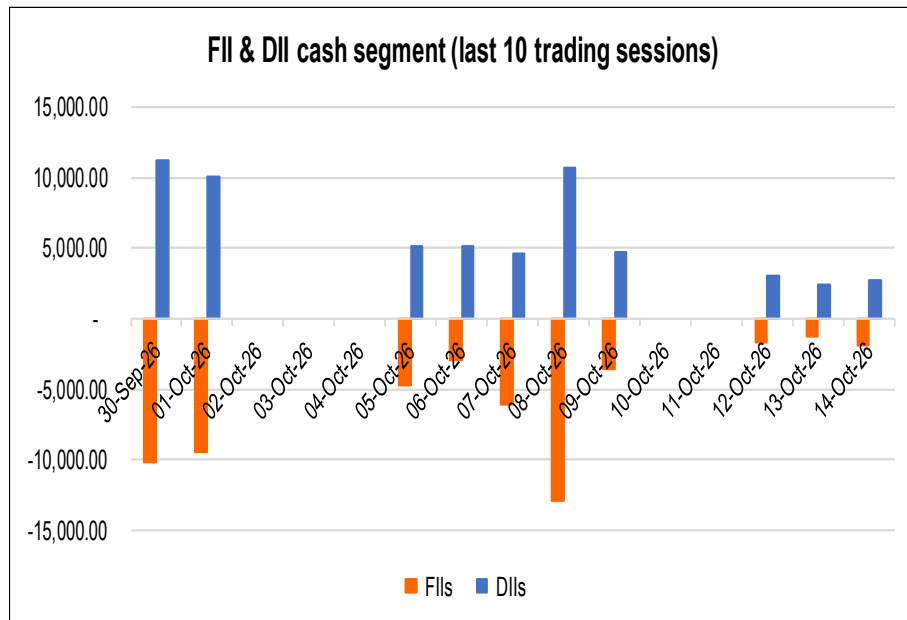
The GST demand raised by the Deputy Commissioner of State Tax, Thanjavur, for FY2021-22 has been reduced to Rs 208.91 crore from Rs 337.79 crore following a remand order issued pursuant to the directions of the Madurai Bench of the Madras High Court.



INSTITUTIONAL ACTIVITY

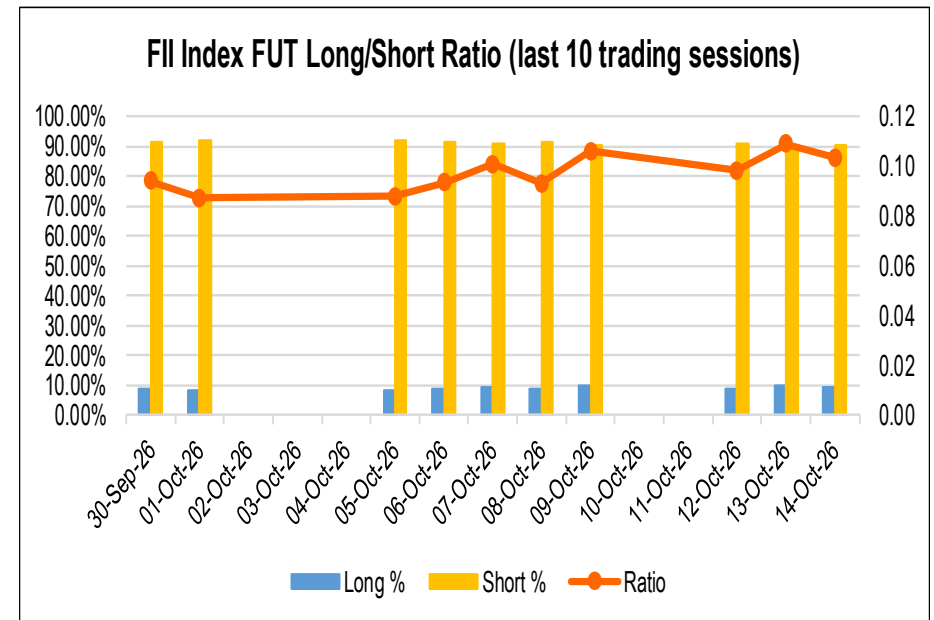
*INR in Crores

Cash Segment	14-Oct-2026	MTD	YTD
FII Net Flows	-1,857.44	-44,649.56	-4,47,717.04
DII Net Flows	2,670.44	48,510.02	6,88,044.87



*INR in Crores

FII's F&O Flows	14-Oct-2026	MTD
Index Futures	-1,101.00	-1,930.27
Index Options	-8,627.09	-15,549.09
Stock Futures	-2,075.39	13,414.98
Stock Options	-749.58	-4,356.72



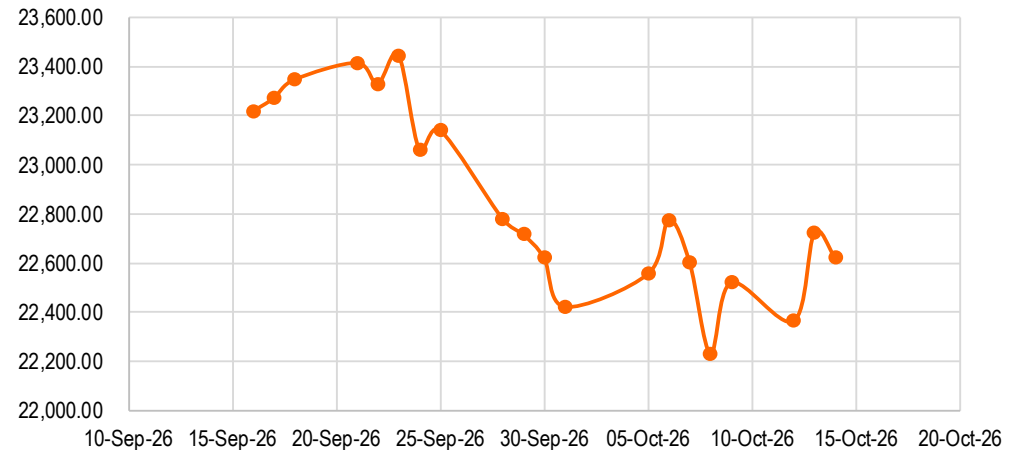


INDEX VIEW

NIFTY

Spot	22622.70
Futures	22648.50
Highest CE OI (27 th OCT)	23500
Highest PE OI (27 th OCT)	22000
PCR (27 th OCT)	0.93
Key Supply Zones	22800, 23400
Key Demand Zones	22500, 22300

NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	55316.00
Futures	55480.80
Highest CE OI (27 th OCT)	56000
Highest PE OI (27 th OCT)	55000
PCR (27 th OCT)	0.97
Key Supply Zones	55800, 56200
Key Demand Zones	55000, 54700

BANK NIFTY closing (last 20 trading sessions)

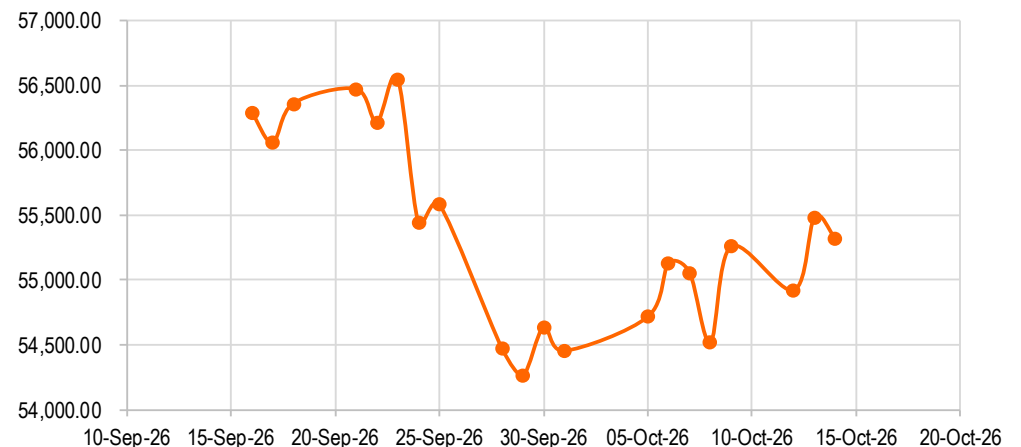




CHART OF THE DAY



Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
BHEL	Bullish	464.00	418	492 533	Up to 3 months



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	9,294.10	0.47%	3.71%	1.81%	Out-performing	Out-performing	Strong Out-performance
Nifty Infrastructure	8,580.30	0.02%	0.90%	-3.69%	Out-performing	Under-performing	Under-performing
Nifty Energy	36,503.50	1.47%	2.40%	-1.83%	Strong Out-performance	Out-performing	In Line
Nifty Financial Services	24,948.70	-1.11%	1.25%	-1.24%	Under-performing	Under-performing	Out-performing
Nifty IT	30,171.00	1.14%	8.78%	3.72%	Strong Out-performance	Strong Out-performance	Strong Out-performance
Nifty Realty	822.80	-0.86%	3.29%	0.06%	Under-performing	Out-performing	Out-performing
Nifty FMCG	45,271.70	1.21%	3.13%	-0.63%	Strong Out-performance	Out-performing	Out-performing
Nifty Pharma	25,736.95	-1.30%	-0.33%	-1.57%	Under-performing	Strong Under-performance	In Line
Nifty Healthcare	15,663.00	-1.25%	-0.14%	-3.76%	Under-performing	Under-performing	Under-performing
Nifty Oil & Gas	10,456.75	1.04%	0.99%	-3.82%	Strong Out-performance	Under-performing	Under-performing
Nifty Auto	25,156.75	-0.93%	2.63%	-6.46%	Under-performing	Out-performing	Under-performing
Nifty Metal	12,006.75	-0.67%	1.15%	-5.75%	In Line	Under-performing	Under-performing
Nifty PSU Bank	8,167.55	0.26%	2.15%	-1.31%	Out-performing	In Line	Out-performing
Nifty Private Bank	27,166.80	-0.58%	1.11%	-0.43%	In Line	Under-performing	Out-performing
Nifty Bank	55,316.00	-0.30%	1.47%	-1.73%	In Line	In Line	In Line
Nifty Consumer Durables	36,568.60	0.20%	2.68%	-3.73%	Out-performing	Out-performing	Under-performing

Stocks to watch: ADANIENSOL, BHEL, BRITANNIA, SUPREMEIND.

Stocks in F&O ban: AMBUJACEM, KAYNES, SAIL.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2722.60	1.02	2845.20	2942.37	2585.54
ADANIPTS	1748.70	-0.81	1769.64	1725.04	1637.59
APOLLOHOSP	7824.00	-0.60	8390.07	8640.13	8053.62
ASIANPAINT	2344.70	-1.32	2400.58	2534.86	2545.82
AXISBANK	1264.60	-0.30	1237.53	1243.44	1284.86
BAJAJ_AUTO	10250.00	-0.66	10695.75	11346.82	10240.75
BAJAJFINSV	1721.70	-1.94	1772.34	1908.07	1874.64
BAJFINANCE	957.00	-2.62	984.50	1041.42	975.17
BEL	382.35	0.62	385.97	398.11	417.40
BHARTIARTL	1794.60	-0.66	1804.03	1864.06	1899.12
BSE	3338.00	-1.11	3237.45	3324.16	3328.05
CIPLA	1314.60	-1.13	1354.99	1395.60	1373.32
COALINDIA	417.00	2.08	418.04	414.36	433.82
DRREDDY	1216.00	-1.94	1205.56	1185.40	1244.39
EICHERMOT	7082.50	-1.12	7214.72	7631.80	7400.25
ETERNAL	316.00	-1.39	326.48	323.37	278.03
GRASIM	2873.00	-1.34	3046.77	3189.46	2978.70
HCLTECH	1327.00	0.08	1243.95	1285.51	1338.35
HDFCBANK	710.70	-0.46	718.26	718.94	805.26
HDFCLIFE	544.05	-2.85	543.61	540.71	613.69
HINDALCO	882.50	-2.19	944.95	995.56	980.68
HINDUNILVR	1895.50	1.07	1895.51	1969.30	2169.44
ICICIBANK	1338.60	-1.59	1336.64	1386.59	1353.00
INDIGO	4718.50	-1.71	4896.20	5055.98	4818.01
INFY	1088.00	2.44	1026.88	1088.67	1242.01

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	261.50	0.19	264.21	268.09	298.20
JIOFIN	219.00	0.55	221.03	234.81	246.09
JSWSTEEL	1176.20	-0.03	1238.92	1275.36	1239.86
KOTAKBANK	438.05	-0.22	421.05	412.34	400.01
LT	3642.00	-0.90	3771.40	3921.86	3953.50
M&M	2793.70	-2.47	2931.75	3168.66	3247.63
MARUTI	11178.00	-0.60	11773.30	12758.56	13767.30
MAXHEALTH	852.50	-0.99	963.57	998.09	1025.78
NESTLEIND	1383.20	3.69	1347.15	1414.82	1365.10
NTPC	313.70	0.87	320.62	330.05	357.22
ONGC	225.50	1.28	228.70	233.42	256.04
POWERGRID	248.95	-0.62	259.15	264.64	283.36
RELIANCE	1174.60	0.68	1204.31	1263.40	1348.77
SBILIFE	1650.00	-2.20	1720.84	1752.54	1870.31
SBIN	954.90	-0.22	968.90	1013.19	1040.41
SHRIRAMFIN	950.00	-3.85	974.09	1043.74	1009.11
SUNPHARMA	1746.40	-1.37	1816.14	1873.72	1807.34
TATACONSUM	987.90	2.91	975.22	1019.20	1105.23
TATASTEEL	174.49	-0.29	181.38	184.30	194.15
TCS	2304.90	1.57	2121.54	2242.78	2474.47
TECHM	1575.20	2.05	1532.77	1574.14	1516.69
TITAN	4444.00	-0.96	4657.63	4889.49	4425.13
TMPV	283.80	-0.72	289.85	309.52	342.02
TRENT	2971.00	-0.56	2781.48	2864.80	2780.50
ULTRACEMCO	10795.00	0.42	10844.40	11257.40	11672.92



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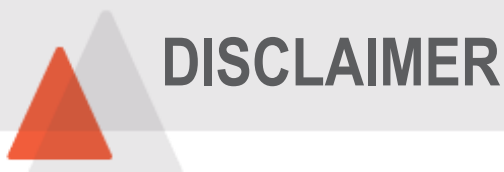
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