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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,421.20	-152.09	-0.29%
S&P 500	7,619.98	-37.00	-0.48%
NASDAQ 100	29,127.16	-241.28	-0.82%
FTSE 100	10,697.57	47.13	0.44%
NIKKEI (8:00 AM)	64,026.50	533.51	0.84%
HANG SENG (8:00 AM)	24,853.00	-64.60	-0.26%
GOLD	4,350.84	-1.06	-0.02%
SILVER	64.01	-0.13	-0.21%
BRENT OIL	107.15	1.47	1.39%
DOLLAR INDEX	99.33	0.22	0.22%
USD/INR	95.92	0.08	0.09%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **U.S. 10-year Treasury** yield crossed 5% on Monday for the first time since 2023, as rising inflation concerns coincided with growing government and corporate borrowing needs.
- **Wall Street** ended lower, led by declines in Nvidia and other chipmakers, after senior U.S. AI executives raised safety concerns and called for a slowdown in AI development.
- **The Dollar Index** strengthened to a near two-week high on Tuesday, supported by surging oil prices and higher Treasury yields, while markets increasingly expect the Federal Reserve to raise interest rates this week.
- **GIFT Nifty** trading at ~23,523.00 is indicating a positive start for the Indian market on Tuesday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,398.10	-79.70	-0.34%
SENSEX	74,781.76	-120.83	-0.16%
BANK NIFTY	56,606.55	134.60	0.24%
FIN NIFTY	25,545.40	25.10	0.10%
NIFTY MIDCAP 100	62,197.20	-160.15	-0.26%
NIFTY SMLCAP 100	19,906.30	-115.65	-0.58%
INDIA VIX	12.29	0.49	4.15%

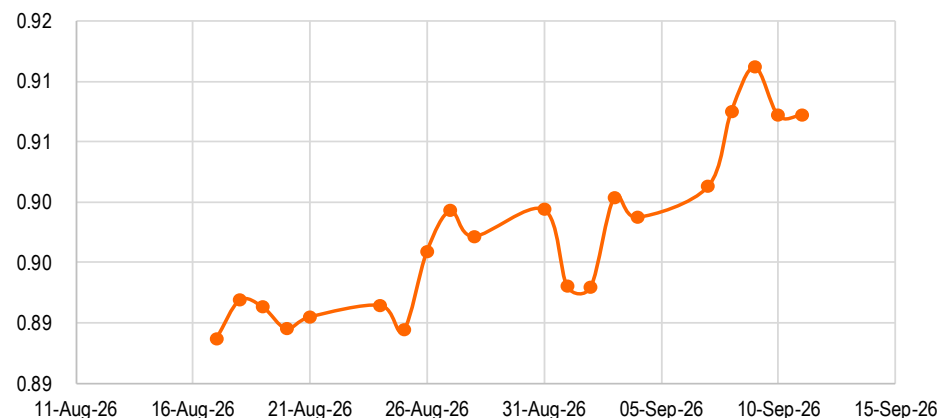
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	12	37	1
NIFTY 500	160	336	4
NIFTY F&O	67	142	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	8	16%
NIFTY 500	167	33%

Highlights

- Nifty reversed from lower levels after a gap-down opening, respecting the 23,300 support zone during the day. However, PE writing in Nifty shifted lower from 24,000 to 23,000, indicating lack of conviction among buyers to reclaim 24,000 ahead of the September expiry.
- Nifty 50 declined 0.34%, while the median stock fell 0.53%. With 21 stocks outperforming and 29 underperforming the index, market breadth remained relatively weak. HDFCBANK (+2.08%) provided significant support to both the Nifty 50 and Bank Nifty, limiting the overall decline in the indices.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





HDFC Bank

The Board members have approved the appointment of the Managing Director & Chief Executive Officer of HDFC Bank by submitting the names of two candidates in order of preference, along with the remuneration proposed to be paid to them, for a period of three years, subject to approval from the RBI. The Board also approved the re-appointment of V Srinivasa Rangan and Jimmy Tata as Whole-time Directors (designated as Executive Directors) of the Bank for a period of three years. Further, the Board has approved the creation of one additional position of Whole-time Director, thereby increasing the strength of Whole-time Directors to four, in addition to the Managing Director & Chief Executive Officer.

HDFC Life Insurance Company

The company has received an appeal order from the Commissioner (Appeals-III), CGST and Central Excise, Mumbai, Maharashtra, in 2026, confirming the total GST demand, including interest and penalty, of Rs 3,365.15 crore. The appeal order will have no material adverse impact on the financial operations of the company, and the same will be further contested by way of an appeal before the GST Appellate Tribunal, the company said.

WeWork India Management

The company has filed an application in Form RSC-1 with the National Company Law Tribunal, Bengaluru, seeking sanction of the proposed reduction of share capital. The proposed reduction involves utilisation of Rs 2,050.16 crore out of the balance of Rs 2,158.9 crore standing to the credit of the Securities Premium Account of the company to fully set off its accumulated losses amounting to Rs 2,050.16 crore as of March 2026, thereby eliminating such losses from its books of account and presenting a true and fair view of its financial position.



INSTITUTIONAL ACTIVITY

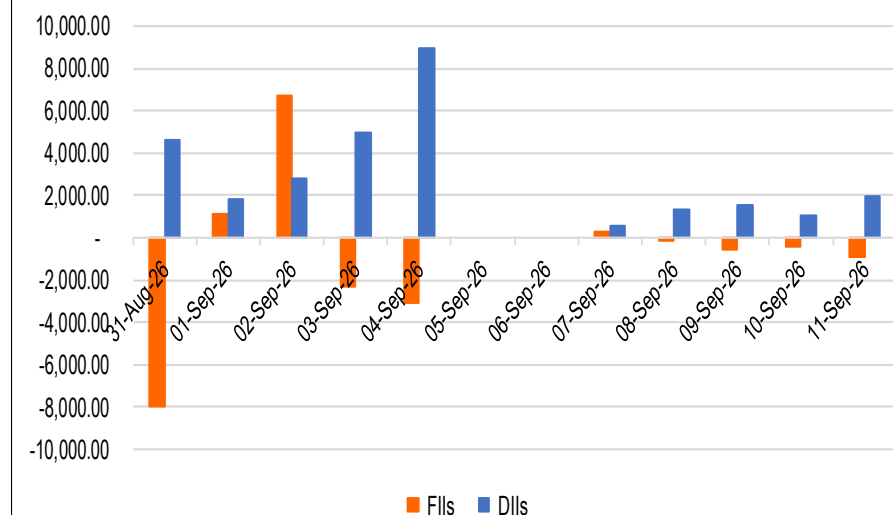
*INR in Crores

Cash Segment	11-Sept-2026	MTD	YTD
FII Net Flows	-930.9	578.75	-3,58,475.91
DII Net Flows	1,968.17	24,986.96	5,88,491.52

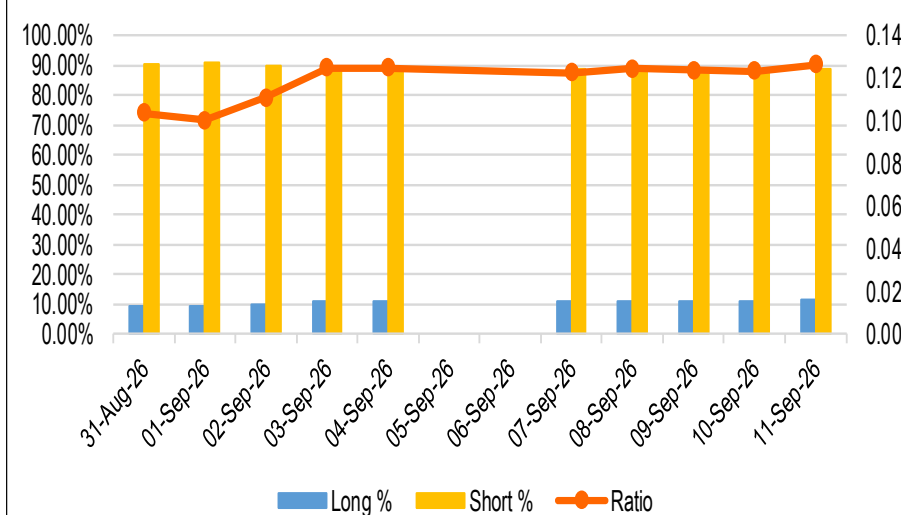
*INR in Crores

FII's F&O Flows	11-Sept-2026	MTD
Index Futures	-450.06	-11,844.38
Index Options	4,435.30	-10,048.04
Stock Futures	-1,056.35	-2,745.65
Stock Options	1.79	975.91

FII & DII cash segment (last 10 trading sessions)



FII Index FUT Long/Short Ratio (last 10 trading sessions)



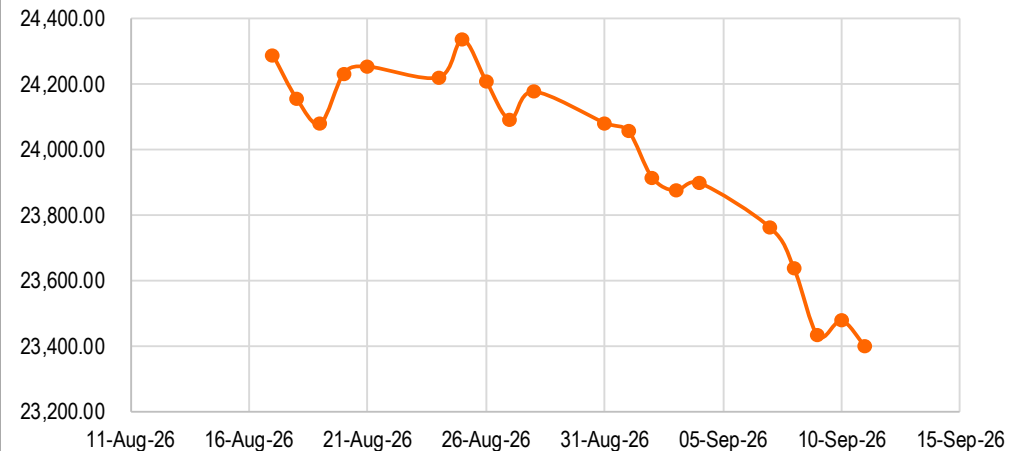


INDEX VIEW

NIFTY

Spot	23398.10
Futures	23485.20
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	1.01
Key Supply Zones	23650, 24000
Key Demand Zones	23300, 23000

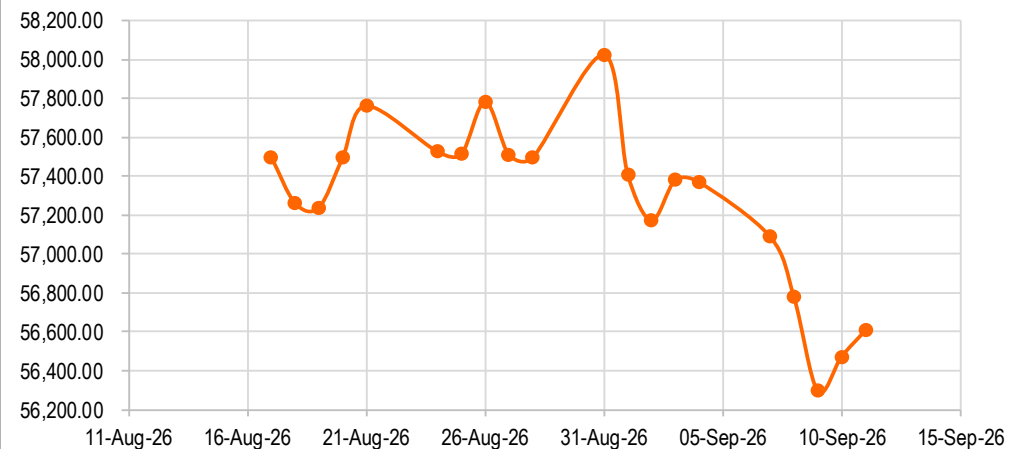
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56606.55
Futures	56869.20
Highest CE OI (29 th SEPT)	57500
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.91
Key Supply Zones	56800, 57200
Key Demand Zones	56000, 55500

BANK NIFTY closing (last 20 trading sessions)





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	9,723.85	-0.73%	-2.75%	-0.90%	Under-performance	Under-performance	Out-performance
Nifty Infrastructure	9,077.15	-0.62%	-0.73%	-3.63%	Under-performance	Out-performance	Out-performance
Nifty Energy	37,935.20	-0.75%	-0.42%	-1.61%	Under-performance	Out-performance	Out-performance
Nifty Financial Services	25,545.40	0.10%	-0.58%	-2.55%	Out-performance	Out-performance	Out-performance
Nifty IT	28,921.50	0.11%	-3.22%	-7.77%	Out-performance	Under-performance	Under-performance
Nifty Realty	848.50	-2.70%	-4.88%	-5.26%	Under-performance	Under-performance	Under-performance
Nifty FMCG	45,053.75	-0.29%	-1.52%	-7.33%	Out-performance	Under-performance	Under-performance
Nifty Pharma	26,532.40	-0.09%	-1.30%	0.33%	Out-performance	Under-performance	Out-performance
Nifty Healthcare	16,492.10	-0.16%	-0.80%	-0.08%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,937.00	-0.84%	-0.98%	-2.35%	Under-performance	Out-performance	Out-performance
Nifty Auto	27,304.50	-0.86%	-1.70%	-6.52%	Under-performance	Under-performance	Under-performance
Nifty Metal	12,999.05	-2.30%	-1.19%	0.44%	Under-performance	Under-performance	Out-performance
Nifty PSU Bank	8,349.90	-0.62%	-0.74%	-4.45%	Under-performance	Out-performance	Under-performance
Nifty Private Bank	27,436.00	0.48%	-0.14%	0.69%	Out-performance	Out-performance	Out-performance
Nifty Bank	56,606.55	0.24%	-0.30%	-1.54%	Out-performance	Out-performance	Out-performance
Nifty Consumer Durables	38,900.80	-0.30%	-0.83%	-4.21%	Out-performance	Out-performance	Under-performance

Stocks to watch: ANGELONE, BLUESTAR, BSE, VBL.

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



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3060.00	-0.56	3007.45	3049.14	2523.78
ADANIPTS	1764.60	-0.19	1698.91	1735.44	1609.88
APOLLOHSP	8836.00	-0.72	8791.57	8837.42	7922.05
ASIANPAINT	2472.50	-1.02	2581.31	2661.02	2593.15
AXISBANK	1246.00	0.00	1252.12	1260.30	1287.83
BAJAJ_AUTO	11678.00	-0.76	11843.25	11346.19	10061.95
BAJAJFINSV	1913.50	-1.39	1985.41	1960.94	1904.49
BAJFINANCE	1034.50	-0.86	1068.69	1067.35	978.23
BEL	404.35	-0.16	409.22	406.18	418.80
BHARTIARTL	1831.10	-0.43	1885.08	1915.87	1930.30
CIPLA	1366.00	-0.53	1408.35	1431.04	1389.68
COALINDIA	426.40	-1.30	411.18	417.39	429.83
DRREDDY	1165.50	1.97	1167.63	1191.53	1250.98
EICHERMOT	7530.00	-2.17	7887.17	7787.46	7392.85
ETERNAL	323.50	0.43	324.54	309.38	274.68
GRASIM	3281.90	-1.12	3297.29	3226.74	2948.12
HCLTECH	1206.10	-0.07	1295.67	1282.03	1381.00
HDFCBANK	708.25	2.08	714.11	746.17	834.46
HDFCLIFE	530.00	0.73	539.83	547.75	637.21
HINDALCO	981.50	-3.21	1025.81	1002.09	967.83
HINDUNILVR	1927.00	-0.79	1993.76	2069.20	2216.22
ICICIBANK	1379.30	-0.38	1417.31	1424.43	1356.75
INDIGO	4973.00	0.57	5102.95	5196.57	4864.11
INFY	1037.70	0.12	1112.17	1113.57	1301.07
ITC	259.85	0.21	266.00	275.90	312.72

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	229.90	-0.15	238.98	242.92	254.33
JSWSTEEL	1265.00	-2.99	1306.19	1279.83	1227.66
KOTAKBANK	419.00	0.59	412.14	396.75	400.83
LT	3930.70	-0.61	4019.23	3965.49	3981.09
M&M	3107.00	-0.54	3286.75	3277.86	3323.92
MARUTI	12400.00	-1.51	13202.75	13613.28	14229.09
MAXHEALTH	1037.70	-0.09	1008.26	1054.82	1039.79
NESTLEIND	1383.30	-0.21	1439.31	1463.29	1354.25
NTPC	333.40	-0.48	333.85	341.20	357.44
ONGC	232.50	-2.01	235.39	240.36	257.14
POWERGRID	269.10	-0.98	266.94	275.48	284.16
RELIANCE	1257.50	-1.30	1300.54	1301.20	1384.88
SBILIFE	1684.70	-0.93	1746.53	1807.21	1901.04
SBIN	995.70	-1.39	1033.21	1038.49	1040.38
SHRIRAMFIN	1028.60	-0.91	1081.01	1071.48	996.48
SUNPHARMA	1840.00	-1.13	1901.78	1929.13	1804.71
TATACONSUM	991.00	-0.86	1034.51	1070.33	1124.99
TATASTEEL	183.00	-2.02	185.51	186.65	192.69
TCS	2200.80	-0.15	2290.09	2288.35	2587.07
TECHM	1541.00	1.00	1586.52	1577.26	1519.17
TITAN	5009.50	-0.23	5062.12	4897.65	4341.70
TMPV	301.10	0.20	313.14	327.87	348.54
TRENT	2802.40	-0.58	2877.99	2932.50	2779.61
ULTRACEMCO	11000.00	0.19	11391.55	11656.86	11750.07
WIPRO	167.40	0.66	176.89	178.75	207.57



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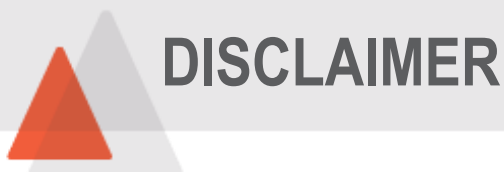
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