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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,461.90	-631.21	-1.21%
S&P 500	7,551.81	-33.92	-0.45%
NASDAQ 100	28,945.06	7.22	0.02%
FTSE 100	10,688.47	30.34	0.28%
NIKKEI (8:00 AM)	64,136.00	213.00	0.33%
HANG SENG (8:00 AM)	24,427.50	-286.28	-1.16%
GOLD	4,324.12	-63.38	-1.44%
SILVER	63.71	-1.22	-1.87%
BRENT OIL	105.52	-0.31	-0.29%
DOLLAR INDEX	100.10	0.12	0.12%
USD/INR	96.11	-0.02	-0.02%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. stocks** whipsawed lower on Wednesday after the Federal Reserve raised its key interest rate for the first time in more than three years, as it sought to curb persistent inflation driven by surging crude prices amid the U.S.-Israel conflict with Iran.
- **The Dollar Index** extended gains after the Fed's rate hike and signals of further tightening, reinforcing expectations of higher U.S. interest rates.
- **GIFT Nifty** trading at ~23,232.00 is indicating a cautious start for the Indian market on Thursday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,217.60	99.00	0.43%
SENSEX	74,336.45	332.63	0.45%
BANK NIFTY	56,292.45	497.70	0.89%
FIN NIFTY	25,262.40	185.75	0.74%
NIFTY MIDCAP 100	60,874.20	-4.05	-0.01%
NIFTY SMLCAP 100	19,388.30	-34.15	-0.18%
INDIA VIX	13.16	-0.27	-2.01%

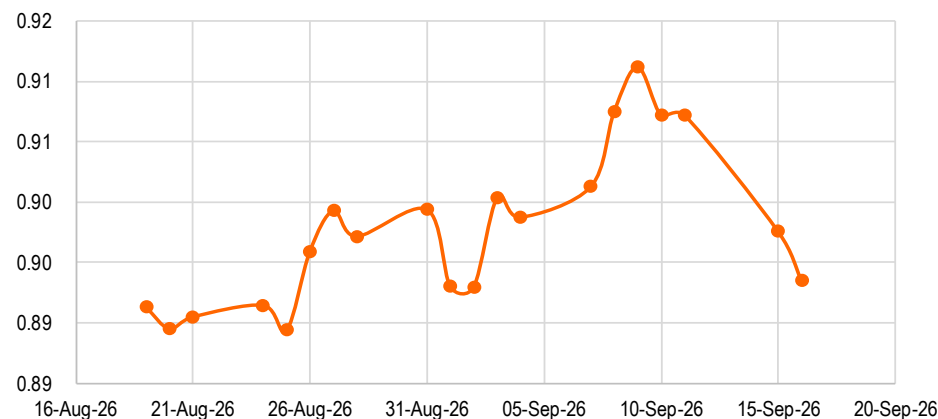
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	30	19	1
NIFTY 500	244	251	5
NIFTY F&O	114	93	3

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	4	8%
NIFTY 500	118	24%

Highlights

- Nifty bounced from around 23,100 but faced selling pressure near the supply zone of 23,300.
- Insurance stocks rebounded, HDFCLIFE (+2.73%) and SBILIFE (+2.65%) saw renewed buying interest from lower levels.
- Continued weakness in IT majors is kept pressure on the broader index.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





Infosys

The company announced the expansion of its Indore Development Center (DC) to further strengthen its presence in Central India, with enhanced capabilities in AI, cloud, cybersecurity and next-generation digital services.

Alembic Pharmaceuticals

The US Food and Drug Administration (USFDA) has issued an Establishment Inspection Report (EIR) and closed the inspection of Alembic Pharmaceuticals' bioequivalence facility in Vadodara, Gujarat. The USFDA conducted the inspection from March 3 to March 7, 2025.

Mazagon Dock Shipbuilders

The company has signed a memorandum of understanding (MoU) with National Shipbuilding & Heavy Industries Park Maharashtra (NSHIPML) to participate as the Anchor Shipyard in the proposed Greenfield Shipbuilding Industrial Cluster at Dighi, Maharashtra. The proposed shipyard envisages an annual shipbuilding capacity of at least 1.2 million gross tonnage.



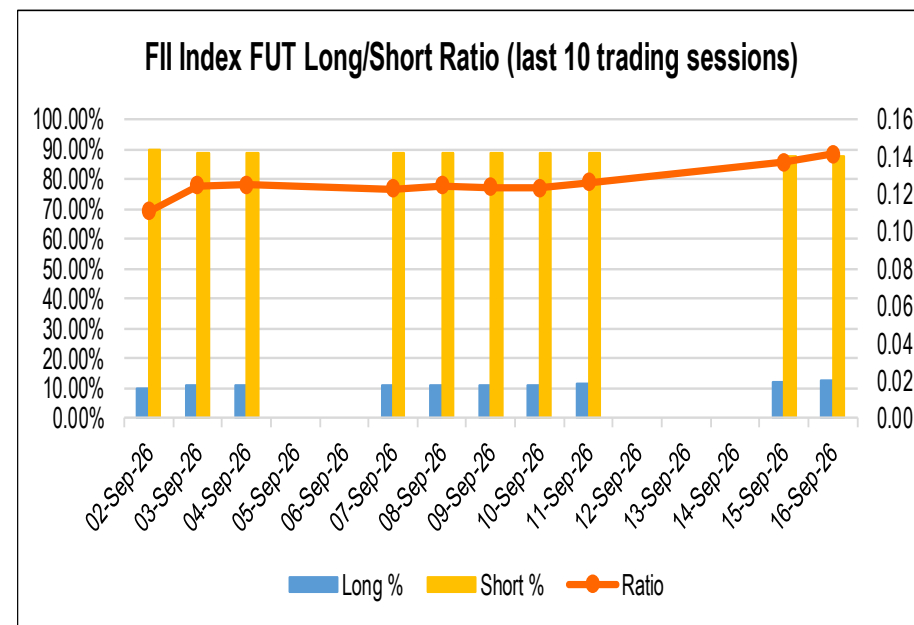
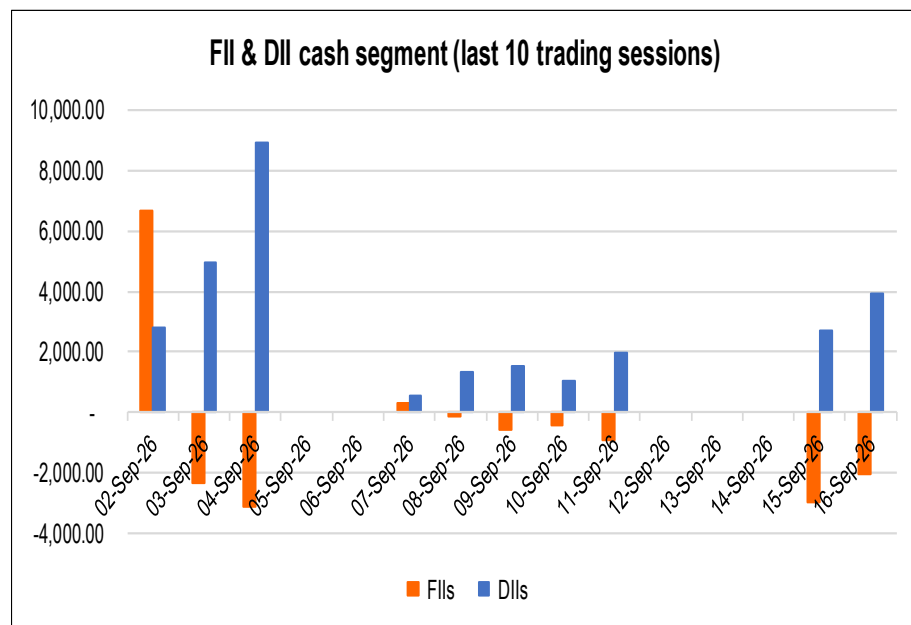
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	16-Sept-2026	MTD	YTD
FII Net Flows	-2,032.61	-4,431.72	-3,63,486.38
DII Net Flows	3,908.23	31,581.24	5,95,085.80

*INR in Crores

FII's F&O Flows	16-Sept-2026	MTD
Index Futures	473.50	-12,327.29
Index Options	-11,485.50	-41,384.82
Stock Futures	2,288.62	-2,509.07
Stock Options	-580.67	-496.64



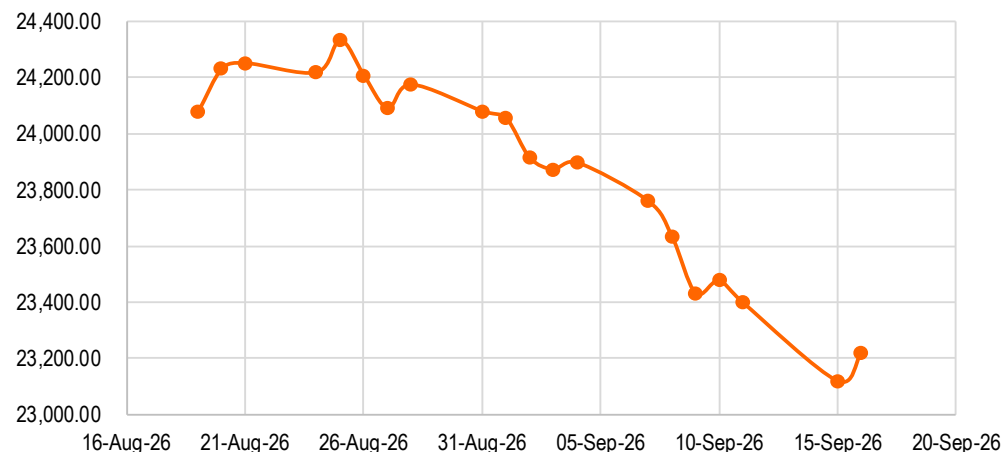


INDEX VIEW

NIFTY

Spot	23217.60
Futures	23272.30
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	0.97
Key Supply Zones	23300, 23650
Key Demand Zones	23000, 22200

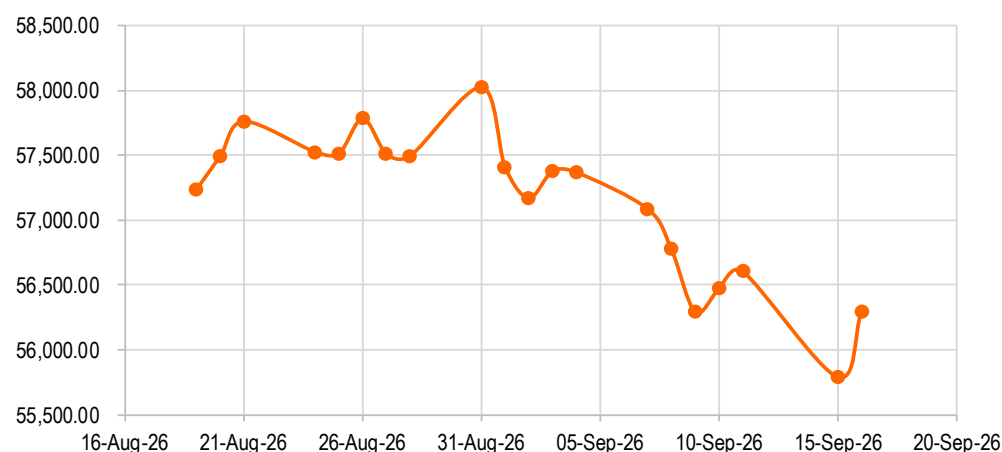
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56292.45
Futures	56407.80
Highest CE OI (29 th SEPT)	57500
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.87
Key Supply Zones	57000, 58500
Key Demand Zones	55500, 53000

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	9,129.10	-0.16%	-6.81%	-8.42%	Under-performance	Under-performance	Under-performance
Nifty Infrastructure	8,908.70	-0.02%	-2.46%	-4.99%	Under-performance	Under-performance	Under-performance
Nifty Energy	37,183.40	0.10%	-2.72%	-3.62%	Under-performance	Under-performance	Out-performance
Nifty Financial Services	25,262.40	0.74%	-1.01%	-3.24%	Out-performance	Out-performance	Out-performance
Nifty IT	29,087.65	-1.58%	0.68%	-3.73%	Under-performance	Out-performance	Out-performance
Nifty Realty	822.30	0.99%	-5.70%	-8.20%	Out-performance	Under-performance	Under-performance
Nifty FMCG	45,559.00	1.63%	0.83%	-4.56%	Out-performance	Out-performance	Under-performance
Nifty Pharma	26,146.20	-0.16%	-1.54%	-0.82%	Under-performance	Under-performance	Out-performance
Nifty Healthcare	16,274.65	-0.15%	-1.48%	-1.15%	Under-performance	Under-performance	Out-performance
Nifty Oil & Gas	10,872.45	0.70%	-1.43%	-3.19%	Out-performance	Under-performance	Out-performance
Nifty Auto	26,893.65	0.51%	-2.35%	-8.10%	Out-performance	Under-performance	Under-performance
Nifty Metal	12,739.10	0.55%	-4.25%	-2.20%	Out-performance	Under-performance	Out-performance
Nifty PSU Bank	8,275.90	1.44%	-1.50%	-3.98%	Out-performance	Under-performance	Under-performance
Nifty Private Bank	27,284.25	0.79%	-0.08%	0.13%	Out-performance	Out-performance	Out-performance
Nifty Bank	56,292.45	0.89%	-0.32%	-1.69%	Out-performance	Out-performance	Out-performance
Nifty Consumer Durables	37,985.95	0.06%	-2.64%	-5.66%	Under-performance	Under-performance	Under-performance

Stocks to watch: ITC, MARICO, SBIN.

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	2920.00	-0.29	2999.39	3039.83	2529.36
ADANIPTS	1723.80	0.58	1702.12	1730.22	1612.22
APOLLOHSP	8696.50	-0.20	8779.97	8831.12	7935.68
ASIANPAINT	2416.60	0.57	2556.49	2647.68	2588.47
AXISBANK	1241.00	1.48	1251.80	1255.96	1287.48
BAJAJ_AUTO	11593.00	1.48	11830.60	11403.61	10086.75
BAJAJFINSV	1837.00	-1.00	1969.23	1959.67	1902.65
BAJFINANCE	1006.20	-0.30	1060.28	1066.23	978.41
BEL	385.75	0.74	406.43	404.66	418.57
BHARTIARTL	1835.00	0.25	1873.18	1912.15	1927.06
CIPLA	1358.00	0.52	1400.67	1426.73	1388.17
COALINDIA	422.25	0.72	412.49	416.99	430.32
DRREDDY	1140.00	-0.44	1163.34	1182.78	1250.10
EICHERMOT	7500.00	0.64	7831.37	7786.36	7395.23
ETERNAL	317.00	0.56	324.46	310.57	274.83
GRASIM	3187.00	0.50	3288.73	3225.82	2953.03
HCLTECH	1253.00	-0.06	1289.85	1286.12	1377.47
HDFCBANK	721.50	0.69	713.41	741.75	831.70
HDFCLIFE	530.20	2.73	538.09	545.95	634.80
HINDALCO	972.70	1.46	1017.80	1001.72	969.66
HINDUNILVR	1962.00	1.23	1984.27	2058.98	2211.90
ICICIBANK	1358.80	0.62	1411.41	1421.78	1356.67
INDIGO	4733.50	-0.89	5053.65	5170.69	4853.75
INFY	1060.00	-1.58	1106.27	1114.03	1296.37
ITC	264.15	2.38	264.95	274.80	311.31

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	224.84	-0.34	236.73	242.26	253.58
JSWSTEEL	1248.90	1.60	1302.83	1279.60	1228.96
KOTAKBANK	415.00	1.27	414.36	397.98	400.80
LT	3807.70	-1.12	3994.61	3958.00	3979.33
M&M	3070.00	1.34	3251.13	3271.90	3317.62
MARUTI	12166.00	-0.53	13050.05	13521.34	14191.84
MAXHEALTH	1025.00	-0.49	1010.10	1050.90	1038.49
NESTLEIND	1384.50	1.65	1430.01	1459.31	1355.32
NTPC	327.00	-0.76	332.97	340.12	357.48
ONGC	236.80	0.36	235.13	240.05	257.05
POWERGRID	262.80	0.00	266.51	274.60	284.04
RELIANCE	1240.00	0.38	1292.40	1298.11	1381.88
SBILIFE	1697.90	2.65	1735.71	1801.85	1897.57
SBIN	991.40	2.42	1025.47	1036.17	1040.40
SHRIRAMFIN	979.00	-0.08	1067.44	1068.08	997.94
SUNPHARMA	1853.50	1.01	1898.35	1926.58	1805.37
TATACONSUM	1000.10	1.42	1027.11	1065.19	1123.10
TATASTEEL	183.00	-0.35	185.26	186.37	192.86
TCS	2188.80	-2.76	2282.42	2294.07	2577.97
TECHM	1558.00	-1.14	1583.11	1582.85	1519.89
TITAN	4908.50	1.08	5044.49	4911.17	4351.88
TMPV	301.00	-0.86	310.72	326.17	348.01
TRENT	2769.70	1.45	2858.57	2917.06	2778.59
ULTRACEMCO	10700.00	0.03	11302.40	11618.60	11741.24
WIPRO	166.89	-1.83	175.74	178.55	206.79



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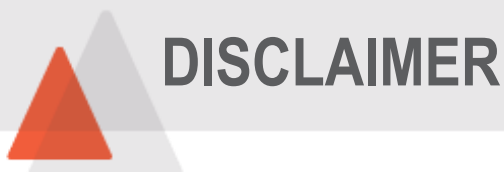
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