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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,778.04	316.14	0.61%
S&P 500	7,637.76	85.95	1.14%
NASDAQ 100	29,446.98	501.92	1.73%
FTSE 100	10,816.14	127.67	1.19%
NIKKEI (8:00 AM)	64,676.00	539.75	0.84%
HANG SENG (8:00 AM)	24,758.50	154.21	0.63%
GOLD	4,394.17	-5.53	-0.13%
SILVER	66.39	0.29	0.43%
BRENT OIL	104.07	-0.75	-0.72%
DOLLAR INDEX	99.95	-0.04	-0.04%
USD/INR	95.81	-0.06	-0.07%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. markets** witnessed a sharp rebound as U.S. Treasury yields eased below the 5% mark on Thursday, supporting risk appetite.
- The positive sentiment spilled over into **Asian markets**, with major indices trading higher in early Friday trade.
- **USD/INR** briefly moved above the 96 level on Thursday but failed to sustain the gains and closed back below the mark.
- **GIFT Nifty** trading at ~23,334.00 is indicating a muted start for the Indian market on Friday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,270.60	53.00	0.23%
SENSEX	74,314.59	-21.86	-0.03%
BANK NIFTY	56,055.75	-236.70	-0.42%
FIN NIFTY	25,318.35	55.95	0.22%
NIFTY MIDCAP 100	61,432.10	557.90	0.92%
NIFTY SMLCAP 100	19,535.70	147.40	0.76%
INDIA VIX	12.29	-0.88	-6.68%

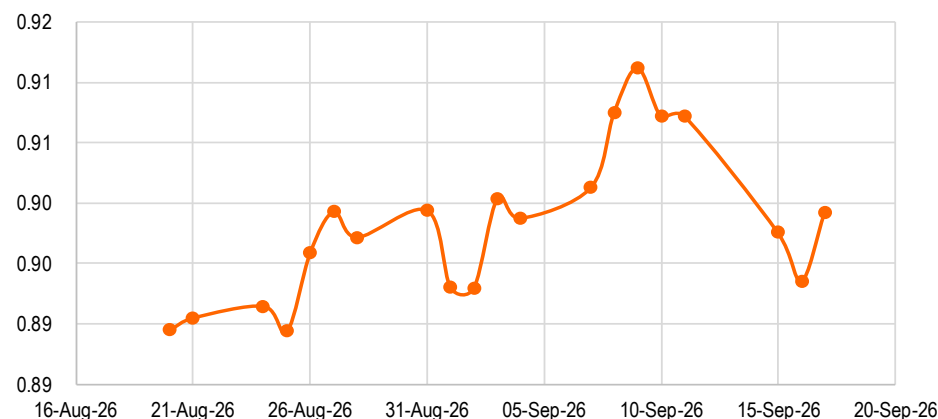
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	36	14	0
NIFTY 500	357	143	0
NIFTY F&O	162	48	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	7	14%
NIFTY 500	124	25%

Highlights

- The rebound in Nifty sustained on Thursday; however, the index continued to face resistance around the 23,300 mark and failed to break and close above this level.
- Pharma & Healthcare stocks regained buying interest, while Insurance stocks witnessed a sharp reversal from lower levels for the second consecutive session, indicating renewed buying interest in these segments. With 285 stocks outperforming and 215 underperforming the Nifty500 index, market breadth remained positive, indicating that gains were relatively broad-based.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





Petronet LNG

The company has approved a proposal to incorporate a 50:50 joint venture company with Gruner Renewable Energy Private Limited to establish 10 compressed biogas (CBG) plants, each with a capacity of 18 MT per day, across the country, with an estimated capital outlay of Rs 1,200 crore.

Federal Bank

The Board has approved the establishment of a medium-term note programme for an amount of up to \$500 million.

Wipro

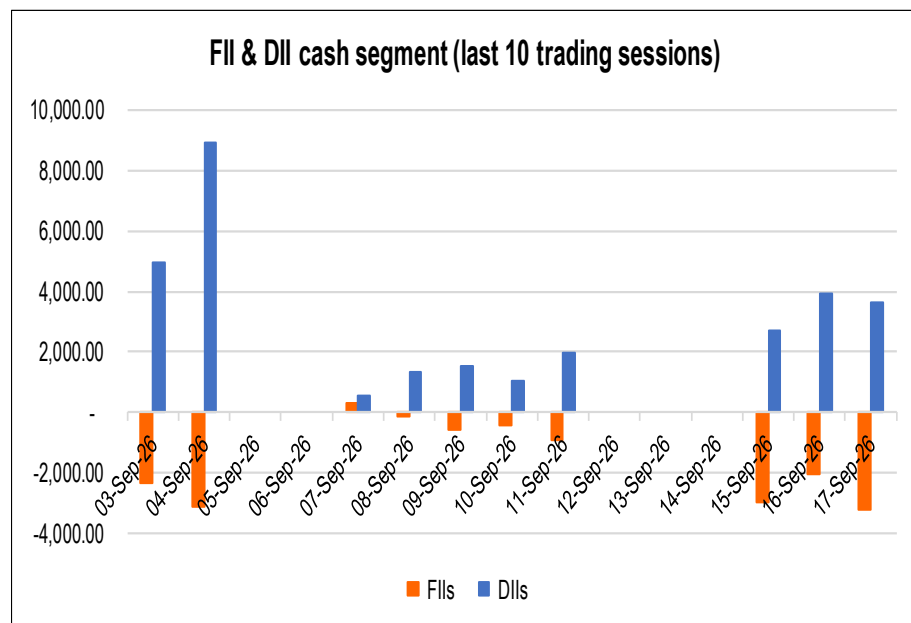
Wipro announced the launch of Wipro STO360, a new solution developed in collaboration with Aramco and SAP to help asset-intensive organisations modernise and efficiently manage shutdown, turnaround and outage (STO) activities.



INSTITUTIONAL ACTIVITY

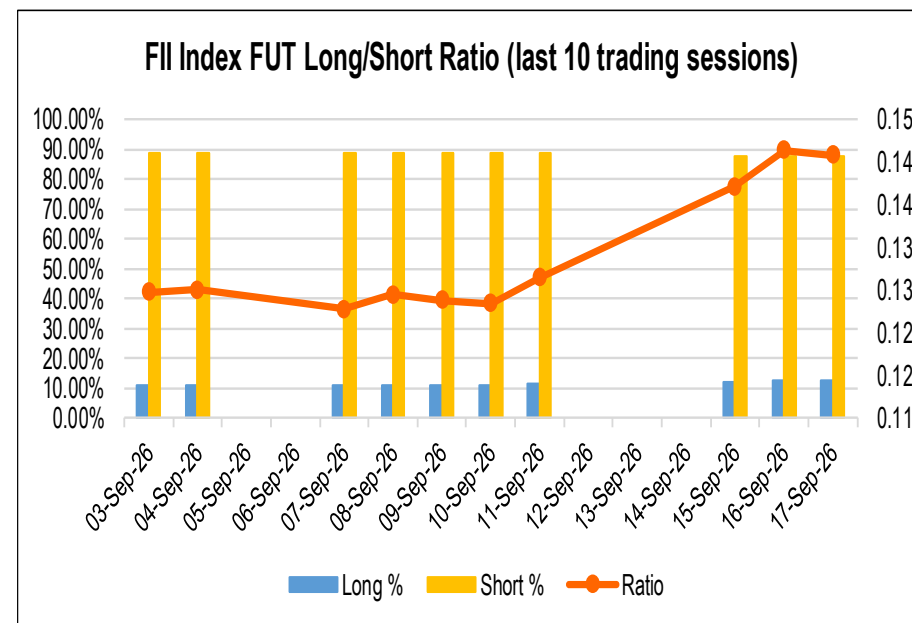
*INR in Crores

Cash Segment	17-Sept-2026	MTD	YTD
FII Net Flows	-3,208.76	-7,640.48	-3,66,695.14
DII Net Flows	3,617.75	35,198.99	5,98,703.55



*INR in Crores

FII's F&O Flows	17-Sept-2026	MTD
Index Futures	-300.05	-12,627.34
Index Options	5,532.36	-35,852.46
Stock Futures	507.77	-2,001.30
Stock Options	-549.17	-1,045.81



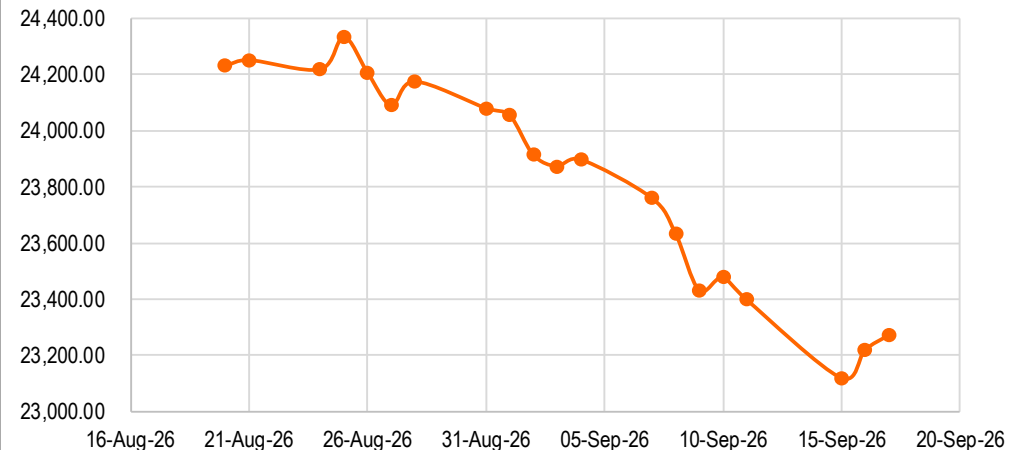


INDEX VIEW

NIFTY

Spot	23270.60
Futures	23333.40
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	0.96
Key Supply Zones	23300, 23650
Key Demand Zones	23000, 22200

NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56055.75
Futures	56310.00
Highest CE OI (29 th SEPT)	57500
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.82
Key Supply Zones	57000, 58500
Key Demand Zones	55500, 53000

BANK NIFTY closing (last 20 trading sessions)

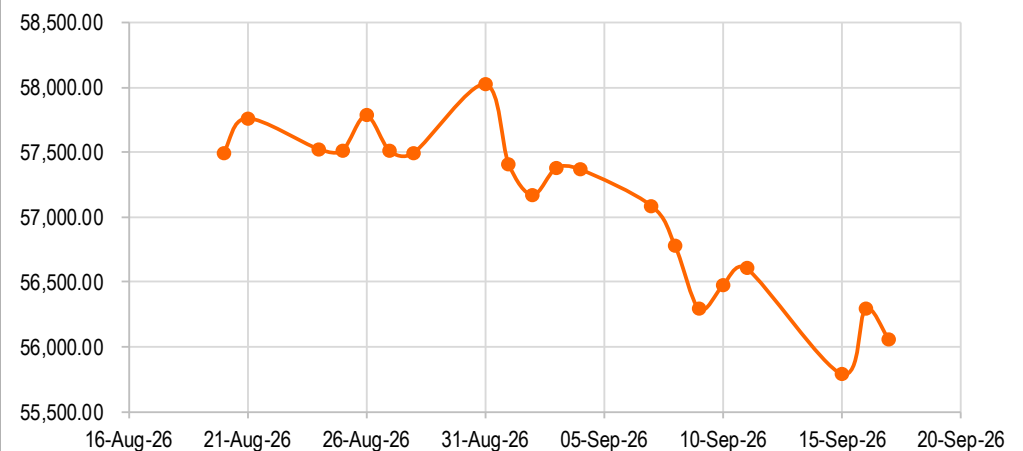




CHART OF THE DAY



Symbol	View	LTP	Invalidation Level	Up side Levels	Time Frame
ABSLAMC	Bullish	1090.10	945	1170 1248	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	9,271.90	1.56%	-4.65%	-5.58%	Out-performance	Under-performance	Under-performance
Nifty Infrastructure	8,969.30	0.68%	-1.19%	-3.61%	Out-performance	Under-performance	Under-performance
Nifty Energy	37,381.75	0.53%	-1.46%	-1.95%	Out-performance	Under-performance	Out-performance
Nifty Financial Services	25,318.35	0.22%	-0.89%	-2.67%	Under-performance	Under-performance	Out-performance
Nifty IT	29,155.60	0.23%	0.81%	-4.20%	At Par	Out-performance	Under-performance
Nifty Realty	834.25	1.45%	-1.68%	-6.82%	Out-performance	Under-performance	Under-performance
Nifty FMCG	45,572.70	0.03%	1.15%	-4.00%	Under-performance	Out-performance	Under-performance
Nifty Pharma	26,579.25	1.66%	0.18%	1.01%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,529.15	1.56%	0.22%	0.71%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,857.35	-0.14%	-0.73%	-2.86%	Under-performance	Under-performance	Out-performance
Nifty Auto	27,159.15	0.99%	-0.53%	-6.94%	Out-performance	Out-performance	Under-performance
Nifty Metal	12,858.45	0.94%	-1.08%	-1.27%	Out-performance	Under-performance	Out-performance
Nifty PSU Bank	8,262.80	-0.16%	-1.04%	-4.12%	Under-performance	Under-performance	Under-performance
Nifty Private Bank	27,169.20	-0.42%	-0.97%	-0.14%	Under-performance	Under-performance	Out-performance
Nifty Bank	56,055.75	-0.42%	-0.97%	-2.07%	Under-performance	Under-performance	Out-performance
Nifty Consumer Durables	38,011.20	0.07%	-2.29%	-5.62%	Under-performance	Under-performance	Under-performance

Stocks to watch: AUROPHARMA, LUPIN, CDSL, INDIGO.

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



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2923.20	0.11	2996.03	3037.36	2532.40
ADANIPTS	1738.30	0.84	1704.94	1729.16	1613.38
APOLLOHSP	8768.50	0.83	8780.90	8831.42	7942.55
ASIANPAINT	2454.00	1.55	2547.65	2643.44	2586.37
AXISBANK	1240.00	-0.08	1252.05	1254.57	1287.23
BAJAJ_AUTO	11500.00	-0.80	11823.35	11430.33	10098.43
BAJAJFINSV	1859.20	1.21	1961.59	1959.76	1901.52
BAJFINANCE	1015.00	0.87	1057.02	1066.32	978.43
BEL	395.45	2.51	405.74	404.41	418.47
BHARTIARTL	1836.00	0.05	1868.88	1911.11	1925.60
CIPLA	1376.30	1.35	1398.38	1425.62	1387.43
COALINDIA	418.00	-1.01	413.39	416.77	430.53
DRREDDY	1175.00	3.07	1163.59	1179.30	1249.73
EICHERMOT	7493.50	-0.09	7806.52	7787.86	7396.70
ETERNAL	322.35	1.69	324.57	311.28	274.90
GRASIM	3173.10	-0.44	3283.88	3226.59	2955.18
HCLTECH	1258.30	0.42	1286.53	1288.37	1375.68
HDFCBANK	713.00	-1.18	713.06	739.80	830.25
HDFCLIFE	557.00	5.05	539.12	545.97	633.65
HINDALCO	980.50	0.80	1014.88	1001.90	970.56
HINDUNILVR	1942.20	-1.01	1980.34	2055.11	2209.68
ICICIBANK	1347.60	-0.82	1408.69	1421.12	1356.53
INDIGO	4845.00	2.36	5036.25	5165.11	4848.41
INFY	1058.60	-0.13	1103.21	1113.81	1293.87
ITC	266.20	0.78	264.91	274.51	310.63

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	229.30	1.98	236.04	242.25	253.19
JSWSTEEL	1253.40	0.36	1301.21	1280.28	1229.46
KOTAKBANK	416.50	0.36	415.68	398.91	400.78
LT	3836.20	0.75	3984.35	3956.88	3978.20
M&M	3076.50	0.21	3234.21	3271.38	3314.57
MARUTI	12338.00	1.41	12982.45	13489.08	14172.75
MAXHEALTH	1037.00	1.17	1012.10	1049.94	1037.86
NESTLEIND	1370.60	-1.00	1425.29	1457.71	1355.79
NTPC	329.60	0.80	332.62	339.73	357.50
ONGC	232.43	-1.85	234.85	239.76	256.98
POWERGRID	263.75	0.36	266.53	274.28	283.98
RELIANCE	1243.90	0.31	1289.04	1297.47	1380.25
SBILIFE	1766.90	4.06	1735.03	1801.40	1896.26
SBIN	988.70	-0.27	1022.47	1035.60	1040.43
SHRIRAMFIN	995.00	1.63	1061.88	1067.69	998.63
SUNPHARMA	1867.30	0.74	1896.72	1926.16	1805.68
TATACONSUM	1013.70	1.36	1024.40	1063.67	1122.24
TATASTEEL	187.29	2.34	185.43	186.36	192.95
TCS	2190.00	0.05	2277.47	2296.72	2573.10
TECHM	1561.00	0.19	1581.67	1585.50	1520.09
TITAN	4841.00	-1.38	5033.14	4916.26	4356.59
TMPV	314.50	4.49	310.38	325.82	347.79
TRENT	2789.00	0.70	2850.37	2914.36	2778.23
ULTRACEMCO	10764.00	0.60	11268.10	11606.82	11736.26
WIPRO	166.40	-0.29	175.08	178.42	206.37



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