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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,770.31	-572.25	-1.09%
S&P 500	7,580.07	-140.32	-1.82%
NASDAQ 100	28,384.85	-1,017.66	-3.46%
FTSE 100	10,729.78	7.71	0.07%
NIKKIE (8:00 AM)	63,080.50	-209.61	-0.33%
HANG SENG (8:00 AM)	23,311.00	16.58	0.07%
GOLD	3,916.77	17.87	0.46%
SILVER	49.99	0.71	1.44%
BRENT OIL	110.41	-3.02	-2.66%
DOLLAR INDEX	101.84	0.01	0.00%
USD/INR	95.03	-0.16	-0.17%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- U.S. stocks tumbled on Friday, with the **Nasdaq** recording its steepest single-day decline since June 5, as disappointing results from Intel and Amazon intensified concerns over heavy AI-related spending. **Asian markets** slipped on Monday as doubts over the sustainability of the AI investment boom weighed on technology stocks, while elevated oil prices limited demand for sovereign bonds.

- **Oil prices** fell over 2%, earlier on Monday amid hopes of progress in diplomatic talks between Iranian and Qatari officials to end the U.S.-Israeli conflict with Iran.

- **The Indian rupee** strengthened against the U.S. dollar up to 94.94.

- **GIFT Nifty** trading at ~23,262.00 is indicating a positive start for the Indian market on Monday.

MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,053.10	116.35	0.51%
SENSEX	74,459.53	308.49	0.42%
BANK NIFTY	54,686.95	-222.70	-0.41%
FIN NIFTY	24,712.20	7.65	0.03%
NIFTY MIDCAP 100	57,301.25	-540.40	-0.93%
NIFTY SMLCAP 100	18,463.60	-347.75	-1.85%
INDIA VIX	15.30	0.19	1.22%

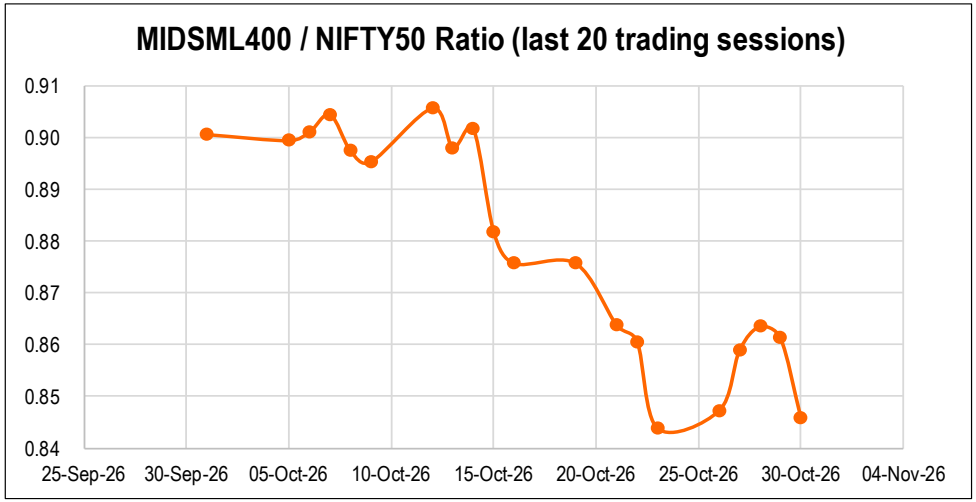
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	29	21	0
NIFTY 500	121	378	1
NIFTY F&O	70	147	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	18	36%
NIFTY 500	95	19%

Highlights

- Nifty extended its recovery on Friday, although the rally was largely driven by heavyweight stocks, with broader market participation remaining weak. Market breadth on the Nifty500 index remained negative, as 378 constituents ended the session in the red, indicating underlying weakness.

- Pharma and Healthcare continued their strong momentum, with the sectoral indices extending their respective winning streaks to five consecutive sessions. Nifty IT also witnessed strong buying interest, gaining over 2% during the session.



INDIA KEY NEWS

Coal India

Coal India's (CIL) monthly coal supplies crossed the 70-million-tonne (MT) mark for the first time, reaching 70.3 MT and surpassing its previous monthly record of 69.4 MT, achieved in March 2026. This represents a robust 19% growth over the 59.2 MT supplied in October FY26. CIL's supplies to the power sector also crossed the 57 MT mark for the first time in the company's history, reaching 57.1 MT in October FY27, up 19% from the 48 MT supplied in October FY26. The previous monthly high of 56.5 MT was recorded in May 2024.

Waaree Renewable Technologies

The company has signed a five-year operation and maintenance (O&M) agreement for a 360 MWp solar power project.

Granules India

The United States Food and Drug Administration (USFDA) has concluded a current Good Manufacturing Practice (cGMP) inspection of the company's finished dosage facility at Gagillapur, Hyderabad. The inspection was conducted from October 19 to October 30, 2026, and concluded with the issuance of a Form FDA 483 containing eleven observations.

Bajaj Electricals

The company has received an assessment order from the Income Tax Department for Assessment Year 2019-20, raising a tax demand of Rs 112.32 crore, including interest, on account of the disallowance of certain expenses.

*Source: moneycontrol.com

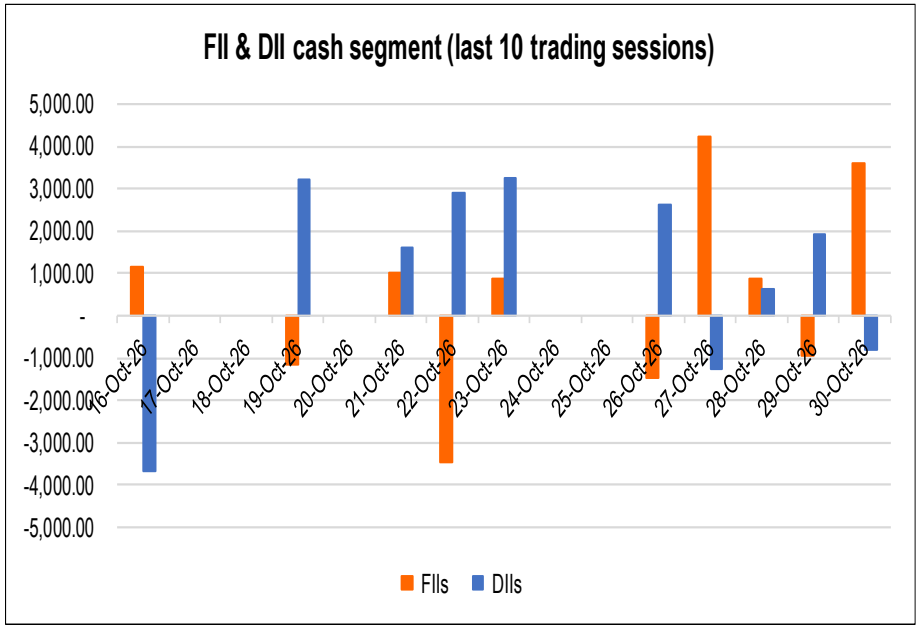
INSTITUTIONAL ACTIVITY

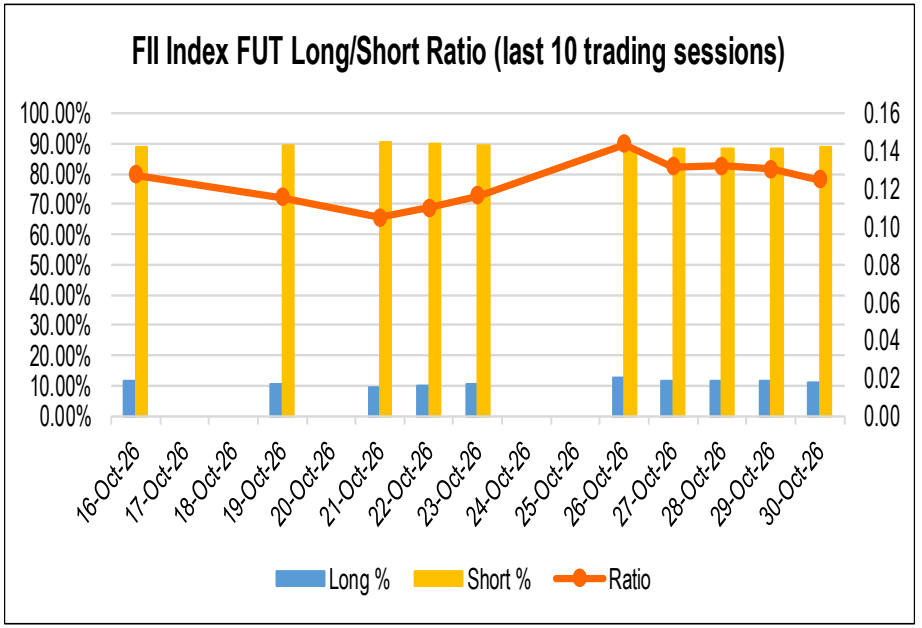
*INR in Crores

Cash Segment	30-Oct-2026	MTD	YTD
FII Net Flows	3,598.54	-45,161.71	-4,48,229.19
DII Net Flows	-817.51	62,220.11	7,01,754.96

*INR in Crores

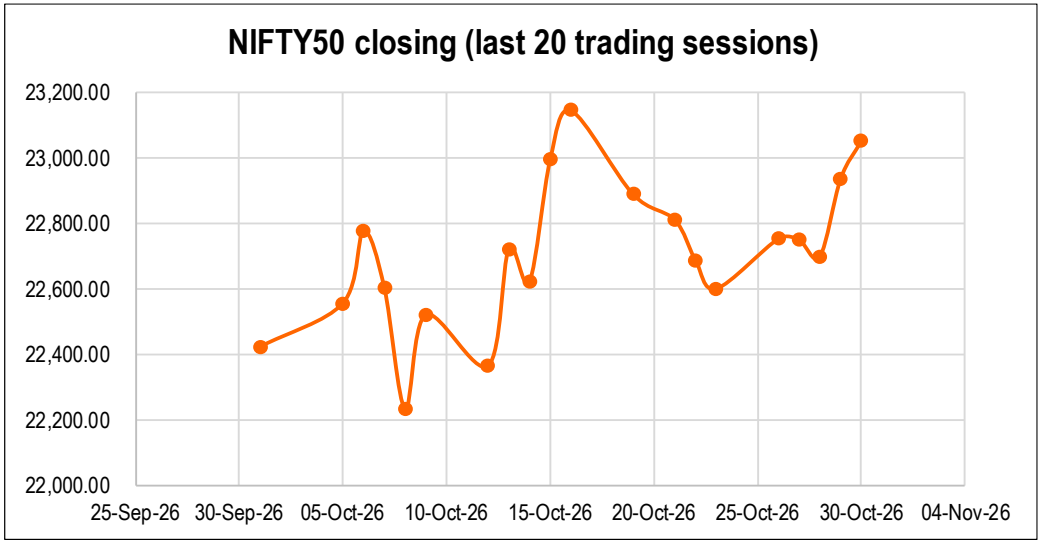
FIIs F&O Flows	30-Oct-2026	MTD
Index Futures	-448.42	-4,974.78
Index Options	5,503.56	-31,214.30
Stock Futures	-287.66	25,935.32
Stock Options	-93.96	-6,793.51



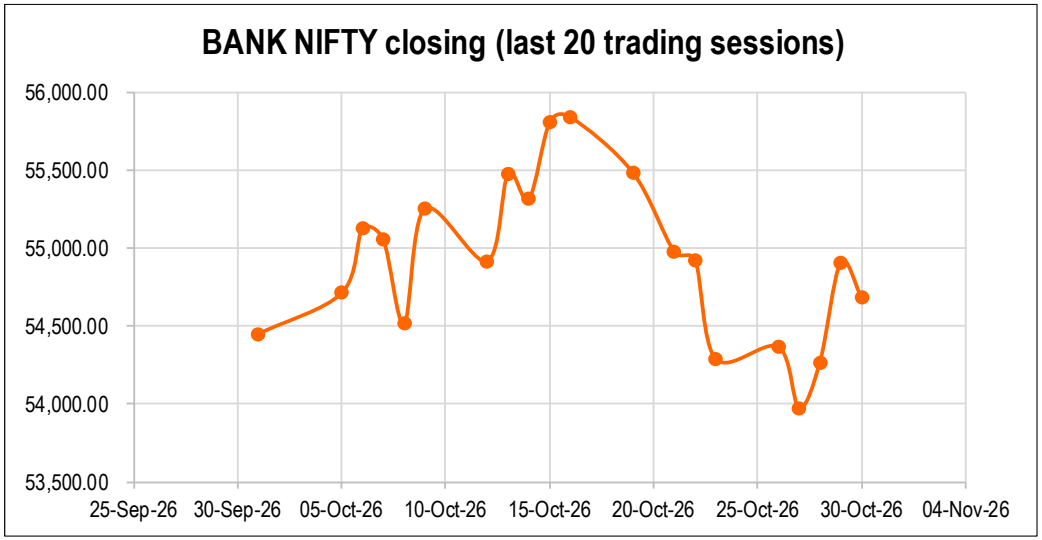


INDEX VIEW

NIFTY	
Spot	23053.10
Futures	23098.90
Highest CE OI (23rd NOV)	23500
Highest PE OI (23rd NOV)	23000
PCR (23rd NOV)	1.23
Key Supply Zones	23150, 23600
Key Demand Zones	22800, 22600



BANK NIFTY	
Spot	54686.95
Futures	54823.40
Highest CE OI (23rd NOV)	57000
Highest PE OI (23rd NOV)	58000
PCR (23rd NOV)	0.95
Key Supply Zones	55000, 56000
Key Demand Zones	54450, 54000



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	8,704.45	-2.01%	0.49%	-4.79%	Strong Under-performance	Under-performing	Strong Under-performance
Nifty Infrastructure	8,799.00	0.07%	1.59%	2.25%	Under-performing	In Line	In Line
Nifty Energy	34,957.90	-0.97%	-0.18%	-3.93%	Strong Under-performance	Under-performing	Strong Under-performance
Nifty Financial Services	24,712.20	0.03%	1.05%	0.64%	Under-performing	In Line	Under-performing
Nifty IT	32,606.90	2.32%	1.03%	15.20%	Strong Out-performance	In Line	Strong Out-performance
Nifty Realty	813.90	-0.72%	3.06%	-2.53%	Strong Under-performance	Out-performing	Strong Under-performance
Nifty FMCG	43,609.20	-0.62%	1.89%	-0.41%	Strong Under-performance	Out-performing	Under-performing
Nifty Pharma	27,124.85	1.55%	5.24%	3.09%	Strong Out-performance	Strong Out-performance	In Line
Nifty Healthcare	16,449.55	1.58%	5.05%	2.20%	Strong Out-performance	Strong Out-performance	In Line
Nifty Oil & Gas	10,303.25	-0.47%	-2.07%	-1.64%	Under-performing	Strong Under-performance	Strong Under-performance
Nifty Auto	25,422.70	-0.87%	1.81%	0.15%	Strong Under-performance	In Line	Under-performing
Nifty Metal	11,784.90	-0.54%	0.45%	-5.42%	Strong Under-performance	Under-performing	Strong Under-performance
Nifty PSU Bank	8,234.85	-0.93%	1.74%	3.74%	Strong Under-performance	In Line	In Line
Nifty Private Bank	27,053.50	0.00%	0.85%	1.33%	Under-performing	In Line	Under-performing
Nifty Bank	54,686.95	-0.41%	0.59%	0.43%	Under-performing	Under-performing	Under-performing
Nifty Consumer Durables	34,525.15	-1.78%	1.99%	-3.90%	Strong Under-performance	Out-performing	Strong Under-performance

Stocks to watch: INDIGO, PERSISTENT.

Stocks in F&O ban: KAYNES, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2579.40	-1.09	2644.39	2846.16	2603.66
ADANIPORTS	1850.00	-1.18	1761.59	1743.26	1653.53
APOLLOHOSP	8448.00	3.02	7897.40	8430.78	8094.61
ASIANPAINT	2320.00	0.78	2335.05	2443.09	2519.78
AXISBANK	1217.00	-0.65	1238.05	1241.74	1283.35
BAJAJ_AUTO	10350.00	-0.32	10152.10	11039.78	10290.76
BAJAJFINSV	1667.60	-0.02	1706.98	1830.28	1855.39
BAJFINANCE	939.10	0.02	949.29	1004.34	972.38
BEL	369.90	-0.03	373.58	390.57	415.60
BHARTIARTL	1973.70	0.08	1862.90	1856.25	1888.89
BSE	3510.40	0.24	3336.04	3300.28	3367.30
CIPLA	1378.90	1.54	1333.89	1370.46	1364.50
COALINDIA	389.00	-1.04	407.72	412.40	433.40
DRREDDY	1352.00	0.52	1247.20	1205.97	1245.28
EICHERMOT	7220.00	-0.25	7116.82	7452.48	7391.33
ETERNAL	343.65	1.72	323.02	325.37	280.37
GRASIM	2981.40	1.66	2912.07	3111.00	2982.60
HCLTECH	1428.10	1.72	1328.08	1297.61	1325.48
HDFCBANK	692.80	1.39	703.02	712.06	789.51
HDFCLIFE	524.90	1.53	537.45	538.66	601.23
HINDALCO	884.70	-0.18	899.08	961.49	980.29
HINDUNILVR	1864.60	0.34	1852.02	1918.92	2142.75
ICICIBANK	1398.00	0.82	1369.15	1377.99	1354.46
INDIGO	4877.60	4.33	4763.41	4913.32	4796.29
INFY	1185.00	3.36	1095.63	1085.27	1215.32

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	265.60	0.23	261.81	263.94	291.73
JIOFIN	204.50	-1.21	212.02	224.72	241.24
JSWSTEEL	1246.00	-0.75	1218.43	1262.55	1244.79
KOTAKBANK	461.60	0.57	439.47	423.60	400.54
LT	3871.70	0.90	3694.27	3844.20	3931.56
M&M	2840.30	-1.72	2850.34	3044.06	3202.04
MARUTI	11397.00	-0.25	11373.00	12187.64	13469.23
MAXHEALTH	860.00	1.04	861.68	953.54	1013.77
NESTLEIND	1167.00	-1.82	1260.73	1348.18	1360.58
NTPC	316.25	1.85	310.31	322.39	355.65
ONGC	225.39	-0.18	224.33	230.48	255.40
POWERGRID	265.00	1.92	251.89	260.48	282.59
RELIANCE	1164.90	-0.21	1186.41	1235.88	1328.77
SBILIFE	1658.60	0.40	1672.83	1711.95	1848.83
SBIN	961.85	-1.03	958.06	989.60	1039.12
SHRIRAMFIN	823.15	-2.13	909.05	989.56	1002.97
SUNPHARMA	1777.70	0.95	1763.35	1834.81	1808.41
TATACONSUM	1025.90	0.48	974.18	997.22	1094.01
TATASTEEL	167.60	-1.10	173.20	180.72	193.79
TCS	2502.60	0.99	2330.76	2264.09	2431.75
TECHM	1790.80	1.20	1664.04	1607.52	1526.13
TITAN	4436.50	0.06	4418.79	4747.73	4444.38
TMPV	265.40	-0.23	276.30	293.85	336.87
TRENT	3017.30	5.44	2855.77	2830.48	2782.23
ULTRACEMCO	11045.00	-1.16	10853.20	11063.32	11623.58

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