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DAILY TECHNICAL & DERIVATIVES REPORT

- Macro Pulse
- Market Snapshot
- India Key News
- Institutional Activity
- Index View
- Strategy for the day
- Sectoral Breadth
- Key Moving Averages

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	46,021.43	-203.72	-0.44%
S&P 500	6,606.49	-18.21	-0.27%
NASDAQ 100	24,355.28	-69.82	-0.29%
FTSE 100	10,063.50	-241.79	-2.35%
NIKKEI (8:00 AM)	53,372.53	-1,866.87	-3.38%
HANG SENG (8:00 AM)	25,393.00	-107.58	-0.42%
GOLD	4,683.84	78.14	1.70%
SILVER	73.77	2.55	3.58%
BRENT OIL	106.46	-2.19	-2.02%
DOLLAR INDEX	99.20	0.14	0.14%
USD/INR	92.94	0.05	0.05%

*Closed

*Source: investing.com, moneycontrol.com

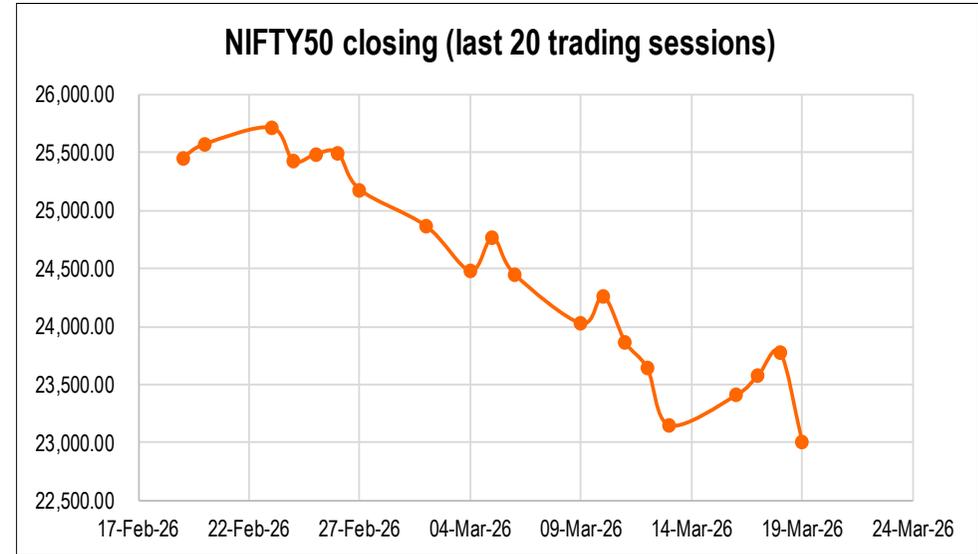
Global updates

- **U.S. equities** ended lower on Thursday, dragged by declines in Micron Technology and Tesla, as rising oil prices fueled inflation concerns and dampened hopes of near-term rate cuts. However, key indices such as the Dow Jones Industrial Average, S&P 500 and Nasdaq are currently near important support levels, indicating a potential technical bounce in the coming sessions.
- **Gold** traded higher earlier on Friday after dropping by nearly 6% during the previous session. However, the expectations of delayed rate cuts amid ongoing geopolitical tensions are likely to drag gold towards its biggest weekly loss in six years.
- **GIFT Nifty** trading at ~23,240.00 is indicating a positive start for the Indian market on Friday.

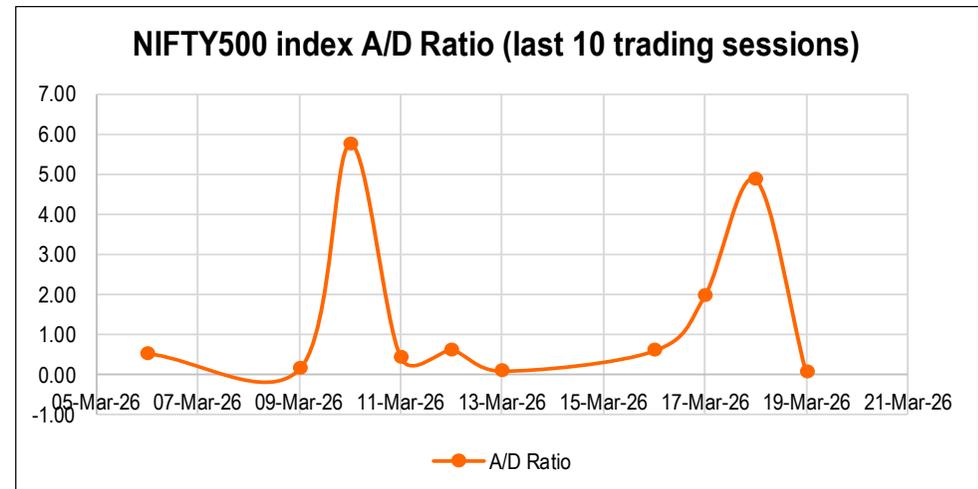


MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,002.15	-775.65	-3.26%
SENSEX	74,207.24	-2,496.89	-3.26%
BANK NIFTY	53,451.00	-1,875.05	-3.39%
FIN NIFTY	24,951.80	-975.55	-3.76%
MIDCAP NIFTY	12,517.00	-463.55	-3.57%
NIFTY SMLCAP 250	14,753.25	-400.30	-2.64%
INDIA VIX	22.84	4.11	21.97%



INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	1	49	0
NIFTY 500	25	475	0
NIFTY F&O	2	204	0



INDEX	SCRIPTS TRADING ABOVE 20 DSMA
NIFTY 50	1
NIFTY 500	65



Telecom

Reliance Jio added a net 24.37 lakh mobile subscribers in January 2026, compared to an addition of 29.6 lakh subscribers in December 2025. Bharti Airtel added a net 44.06 lakh mobile users in January 2026, compared to an addition of 54.28 lakh users in December 2025. Vodafone Idea reported a net loss of 4.11 lakh mobile users in January 2026, compared to a loss of 9.40 lakh subscribers in December 2025.

Wipro

The company has announced the launch of a new hub at Gujarat International Finance Tec-City (GIFT City), Gandhinagar, to deliver advanced technology services to global banking, financial services, and insurance (BFSI) clients.

Nestle India

The company has added a new Munch production line at its Sanand factory in Gujarat, with an investment of Rs 225 crore.

NTPC

The company has signed a Memorandum of Understanding (MoU) with Octopus Energy Group, a leader in clean energy and digital energy platforms, to explore strategic collaboration across the power and energy sector.

Amber Enterprises India

The company has approved an additional investment of Rs 296.02 crore in its subsidiary, IL JIN Electronics (India), by subscribing to its rights issue. Meanwhile, the Board of Directors of IL JIN Electronics (India) has approved raising additional capital of up to Rs 328.12 crore via a rights issue of equity shares. The said rights issue is intended to support IL JIN's strategic initiatives.



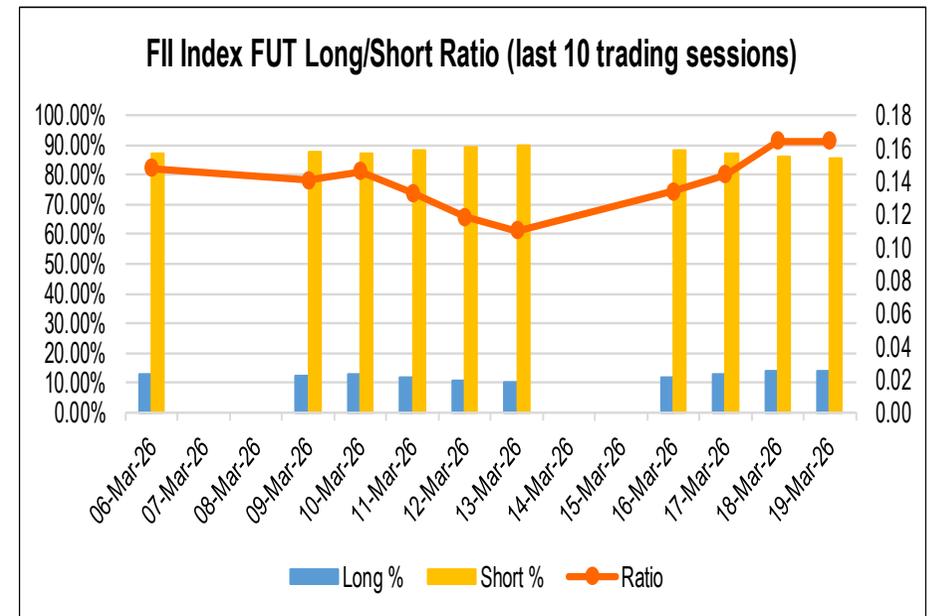
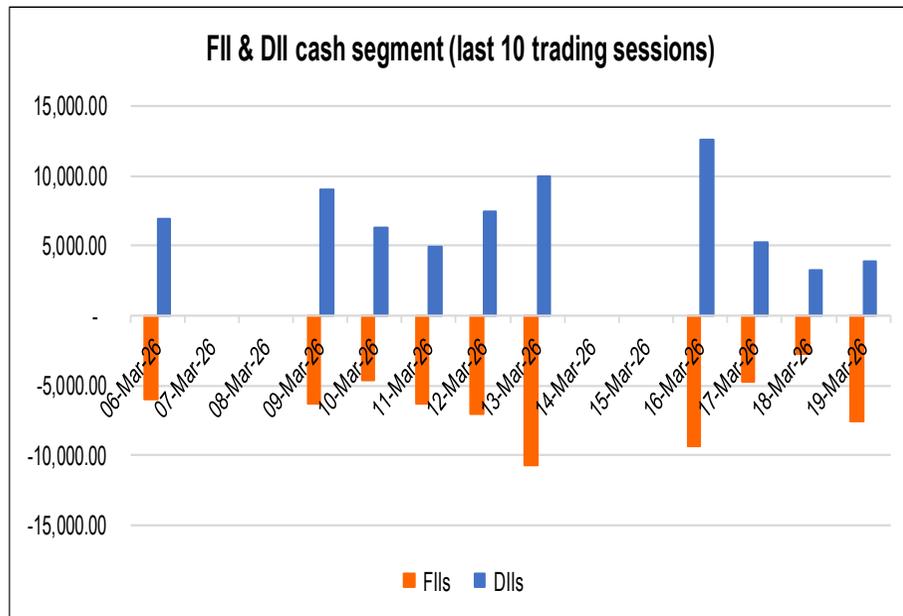
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	19-3-2026	MTD	YTD
FII Net Flows	-7,558.19	-81,262.50	-1,29,338.50
DII Net Flows	3,863.96	95,462.37	2,03,106.22

*INR in Crores

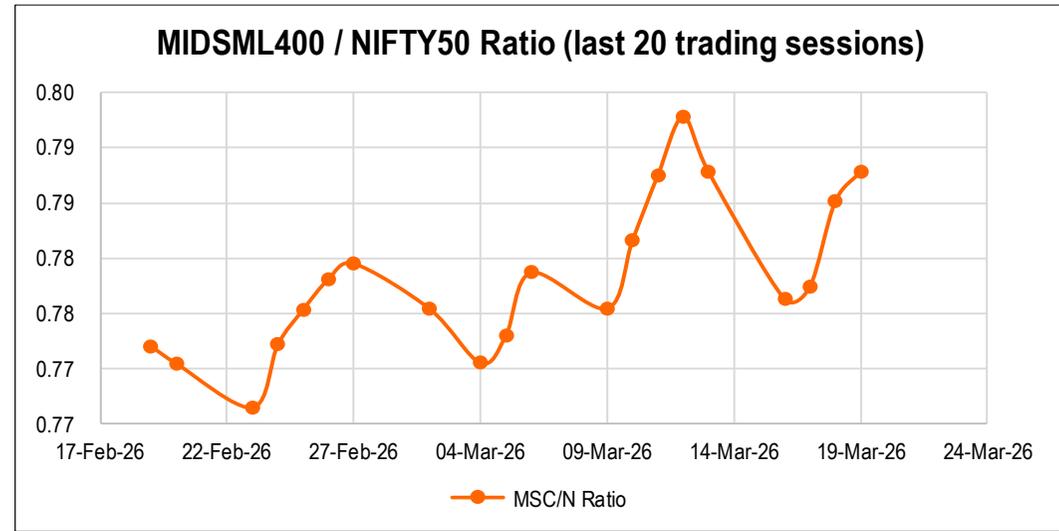
FII's F&O Flows	19-3-2026	MTD
Index Futures	-471.00	-16,674.83
Index Options	-1093.08	-94,914.26
Stock Futures	-6983.93	-12,852.12
Stock Options	397.28	-1,058.58



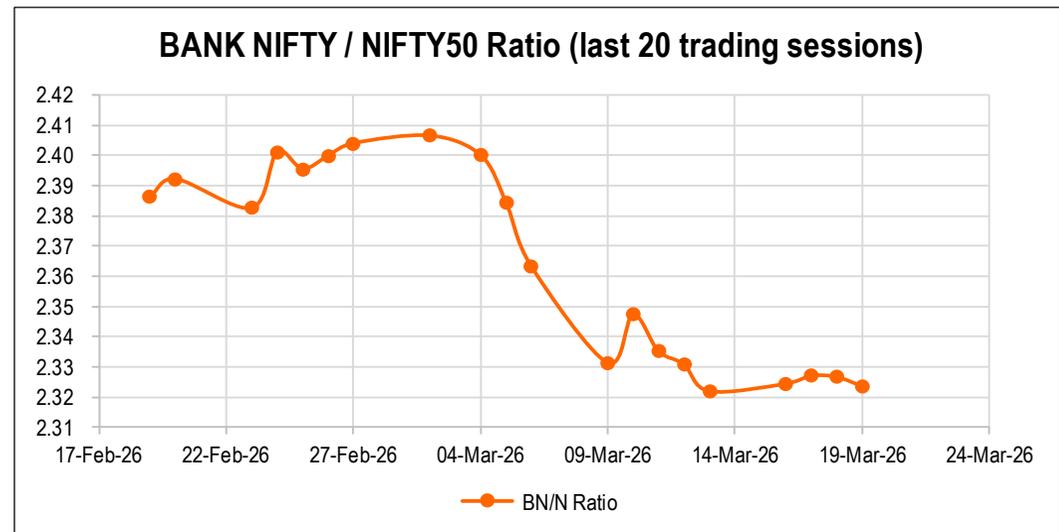


INDEX VIEW

NIFTY	
Spot	23002.15
Futures	23054.80
Highest CE OI (30 th MAR)	26000
Highest PE OI (30 th MAR)	19000
PCR (30 th MAR)	1.09
Key Supply Zones	23400, 23650
Key Demand Zones	22900, 22450



BANK NIFTY	
Spot	53451.00
Futures	53603.80
Highest CE OI (30 th MAR)	59000
Highest PE OI (30 th MAR)	51000
PCR (30 th MAR)	0.79
Key Supply Zones	54150, 54700
Key Demand Zones	53000, 51200





Index Trading View

- **Nifty:** The index declined sharply by nearly 800 points on Thursday, closing around the 23,000 mark. The 22,900-23,000 zone is expected to act as an immediate support. A technical bounce from this region could lead to a gap fill towards 23,600 in the near term.
- **Bank Nifty:** The index formed a Doji candlestick pattern on Thursday after facing rejection near the 54,100 level. The 53,000 zone is seen as a crucial support for Friday. On the upside, a breakout above 54,100 could potentially drive Bank Nifty higher towards the 54,700 level.

Stocks in Bullish Momentum

WAAREEENER.

Stocks in Bearish Momentum

HINDPETRO, PIDILITEIND.

Stocks in F&O ban list

SAIL, SAMMAANCAP.

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Energy	35,639.35	-1.39%	-3.24%	-2.57%	0.89%
Nifty Oil & Gas	10,974.65	-1.98%	-4.89%	-9.24%	-10.27%
Nifty Pharma	22,101.65	-2.35%	-5.04%	-1.56%	-2.74%
Nifty Healthcare	14,116.85	-2.44%	-5.07%	-3.05%	-3.57%
Nifty FMCG	46,861.95	-2.53%	-2.75%	-9.49%	-15.53%
Nifty Infrastructure	8,716.55	-2.79%	-3.10%	-9.51%	-9.36%
Nifty PSU Bank	8,410.30	-2.91%	-4.93%	-12.99%	-1.44%
Nifty Media	1,311.45	-2.98%	-2.79%	-8.08%	-9.22%
Nifty Metal	11,249.35	-3.24%	-5.18%	-6.18%	0.73%
Nifty IT	28,579.60	-3.31%	-3.38%	-10.70%	-24.56%
Nifty Bank	53,451.00	-3.39%	-2.99%	-12.62%	-10.29%
Nifty Private Bank	25,399.65	-3.41%	-2.52%	-12.14%	-11.56%
Nifty Consumer Durables	34,491.35	-3.64%	-4.29%	-8.24%	-6.16%
Nifty Financial Services	24,951.80	-3.76%	-2.77%	-11.55%	-9.64%
Nifty Realty	702.95	-3.81%	-2.30%	-14.35%	-19.93%
Nifty Auto	24,509.90	-4.25%	-2.34%	-11.98%	-13.05%

Sector Analysis

- Despite near-term global weakness, technical support zones hint at a possible bounce, but upside may remain capped due to inflationary pressures and geopolitical risks.
- **Nifty PSU Bank** index has approached its rising trendline support in the 8,300-8,400 zone. The index is currently trading at a deviation of over 7% below its 20-day SMA, indicating a stretched condition on the downside. A short-term bounce of 2-3% is likely from current levels, supported by the confluence of trendline support and mean reversion dynamics. On the upside, 8,600 is expected to act as an immediate resistance level.
- Weakness in gold prices could weigh on jewellery-related stocks, while easing metal prices may marginally benefit consumption-linked sectors.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	1936.80	-3.51	2073.12	2108.87	2306.06
ADANIPTS	1356.00	-3.27	1456.30	1460.58	1436.82
APOLLOHOSP	7252.00	-2.93	7653.08	7367.37	7415.68
ASIANPAINT	2186.00	-3.36	2303.70	2460.88	2515.95
AXISBANK	1207.00	-3.69	1313.18	1317.70	1213.37
BAJAJ_AUTO	8868.50	-4.34	9558.95	9574.91	8965.19
BAJAJFINSV	1714.90	-4.29	1897.56	1956.53	2009.86
BAJFINANCE	832.20	-5.44	945.82	954.21	966.76
BEL	430.80	-2.67	446.18	435.55	409.71
BHARTIARTL	1827.00	-1.53	1880.52	1957.50	1976.98
CIPLA	1239.20	-2.31	1320.23	1347.11	1480.93
COALINDIA	454.20	-0.22	442.38	433.20	398.71
DRREDDY	1274.50	-1.57	1297.68	1254.36	1264.50
EICHERMOT	6793.00	-3.34	7508.40	7429.50	6675.61
ETERNAL	228.74	-5.69	240.36	265.39	291.38
GRASIM	2607.90	-4.23	2748.28	2798.39	2786.39
HCLTECH	1311.80	-3.35	1365.57	1525.27	1555.38
HDFCBANK	798.20	-5.32	866.97	905.67	966.12
HDFCLIFE	633.50	-1.53	682.13	707.81	750.60
HINDALCO	897.05	-3.86	934.41	938.66	797.55
HINDUNILVR	2077.30	-2.72	2242.32	2324.56	2398.61
ICICIBANK	1250.10	-3.04	1333.47	1368.92	1394.03
INDIGO	4154.30	-4.73	4516.16	4716.37	5414.17
INFY	1220.80	-3.65	1289.41	1459.46	1520.47
ITC	298.00	-1.99	312.32	319.52	386.21

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	239.45	-3.53	245.78	259.30	296.61
JSWSTEEL	1130.90	-4.19	1212.16	1210.60	1122.97
KOTAKBANK	368.15	-1.93	398.78	411.94	417.74
LT	3434.50	-4.81	3945.48	3975.85	3816.80
M&M	3045.40	-5.26	3270.71	3449.09	3435.82
MARUTI	12599.00	-3.44	13999.40	14864.96	14736.81
MAXHEALTH	953.10	-2.73	1043.70	1027.97	1136.44
NESTLEIND	1186.30	-1.54	1255.70	1283.63	1230.08
NTPC	374.05	-1.18	378.59	363.32	341.13
ONGC	269.10	1.55	273.09	263.06	247.33
POWERGRID	296.70	-0.90	299.39	283.04	283.27
RELIANCE	1384.80	-1.65	1398.18	1418.30	1448.36
SBILIFE	1903.10	-3.03	1986.20	2017.34	1915.29
SBIN	1048.90	-1.95	1142.26	1104.60	931.41
SHRIRAMFIN	949.80	-7.03	1035.24	1023.19	793.07
SUNPHARMA	1744.40	-1.91	1772.45	1717.58	1693.28
TATACONSUM	1044.60	-2.84	1115.91	1142.22	1127.71
TATASTEEL	190.51	-2.51	200.32	196.21	173.96
TCS	2356.00	-3.47	2541.11	2853.64	3088.37
TECHM	1340.60	-3.22	1363.12	1531.63	1530.09
TITAN	4037.90	-2.60	4203.92	4164.14	3772.10
TMPV	309.30	-4.76	350.69	356.74	388.89
TRENT	3481.90	-4.37	3767.43	3895.76	4711.04
ULTRACEMCO	10814.00	-3.85	11971.15	12324.58	12122.93
WIPRO	188.41	-3.03	199.37	223.61	245.45



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