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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,682.64	-95.40	-0.18%
S&P 500	7,650.50	12.74	0.17%
NASDAQ 100	29,644.17	197.19	0.67%
FTSE 100	10,659.13	-157.01	-1.45%
NIKKEI (8:00 AM)	65,018.95	882.70	1.38%
HANG SENG (8:00 AM)	24,888.50	137.72	0.56%
GOLD	4,406.05	-18.85	-0.43%
SILVER	66.95	-0.20	-0.30%
BRENT OIL	101.63	-2.24	-2.16%
DOLLAR INDEX	99.98	0.05	0.05%
USD/INR	96.01	-0.06	-0.06%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- Expectations of additional Fed rate hikes have pushed investors toward shorter-maturity debt, driving yields higher. **The 10-year U.S. Treasury** yield closed at 5%.
- **Wall Street** ended a volatile week on a muted note on Friday, as benchmark Treasury yields moved above 5%.
- **Crude** prices reversed earlier gains but remained above \$100 per barrel, keeping inflation concerns elevated.
- **GIFT Nifty** trading at ~23,340.00 is indicating a negative bias for the Indian market on Monday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,346.40	75.80	0.33%
SENSEX	74,294.96	-19.63	-0.03%
BANK NIFTY	56,358.70	302.95	0.54%
FIN NIFTY	25,510.00	191.65	0.76%
NIFTY MIDCAP 100	62,191.25	759.15	1.24%
NIFTY SMLCAP 100	19,875.70	340.00	1.74%
INDIA VIX	11.39	-0.91	-7.36%

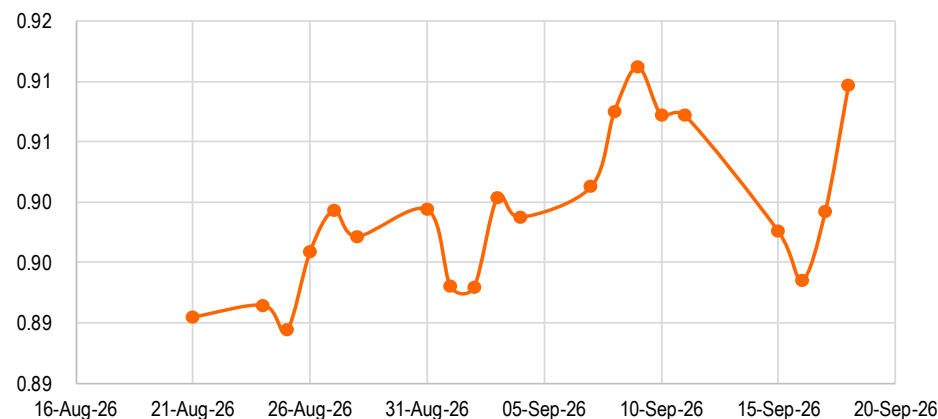
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	26	24	0
NIFTY 500	364	135	1
NIFTY F&O	148	61	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	8	16%
NIFTY 500	175	35%

Highlights

- Nifty extended its rebound further, gaining 75 points and closing above the key resistance level of 23,300, indicating improving buying interest at lower levels. With 21 stocks outperforming and 29 underperforming, market breadth remained relatively weak, indicating that the index gain was driven more by a few higher-weight stocks rather than broad-based participation.
- In the derivatives space, Bank Nifty Call OI shifted higher from 57,500 to 58,000, indicating that bears are becoming less confident in sustaining resistance at the 57,500 level.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





Mazagon Dock Shipbuilders

The company has signed an MoU with National Shipbuilding & Heavy Industries Park Andhra Pradesh (NSHIPAP) to participate as the Anchor Shipyard in the proposed Greenfield Shipbuilding Industrial Cluster at Dugarajapatnam, Andhra Pradesh. The proposed shipyard envisages an annual shipbuilding capacity of at least 1.2 million gross tonnes and aims to create a globally competitive shipbuilding and marine ecosystem in the country.

Coforge

The company announced expanded capabilities to help automotive lenders, fleet operators and remarketing organisations transform vehicle inspections into AI-powered lifecycle intelligence, enabling faster and more informed business decisions throughout the remarketing process.

Nestle India

The company, in its clarification note, said its products are fully compliant with all applicable regulations. The said products, Nan Excella Pro and Lactogen Pro, and their labels were approved by the expert committee of the FSSAI. In response to the notice, the company has again submitted a detailed response to the authorities regarding statements appearing on the labels, which it said are factual in nature and supported by scientific literature.



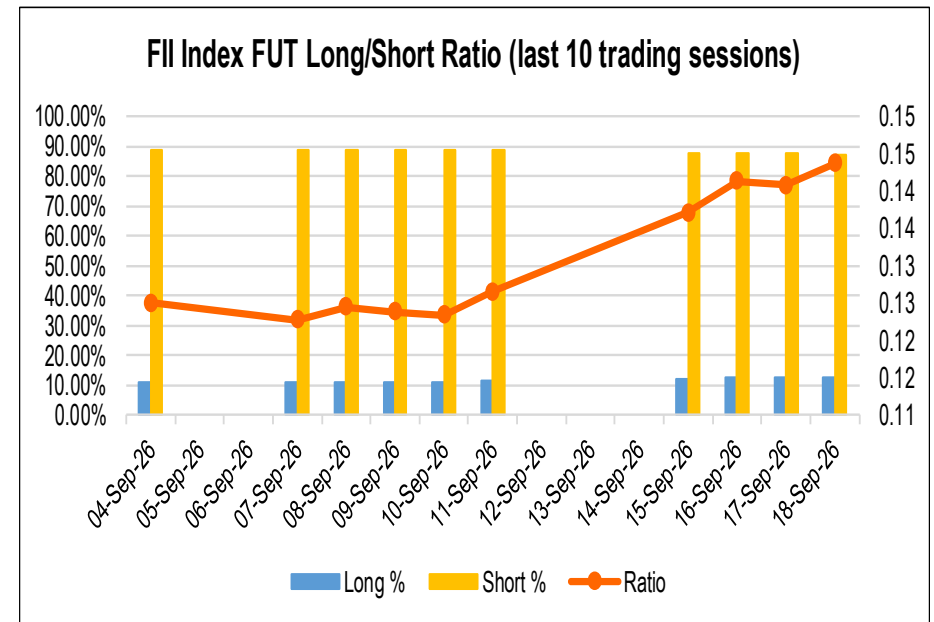
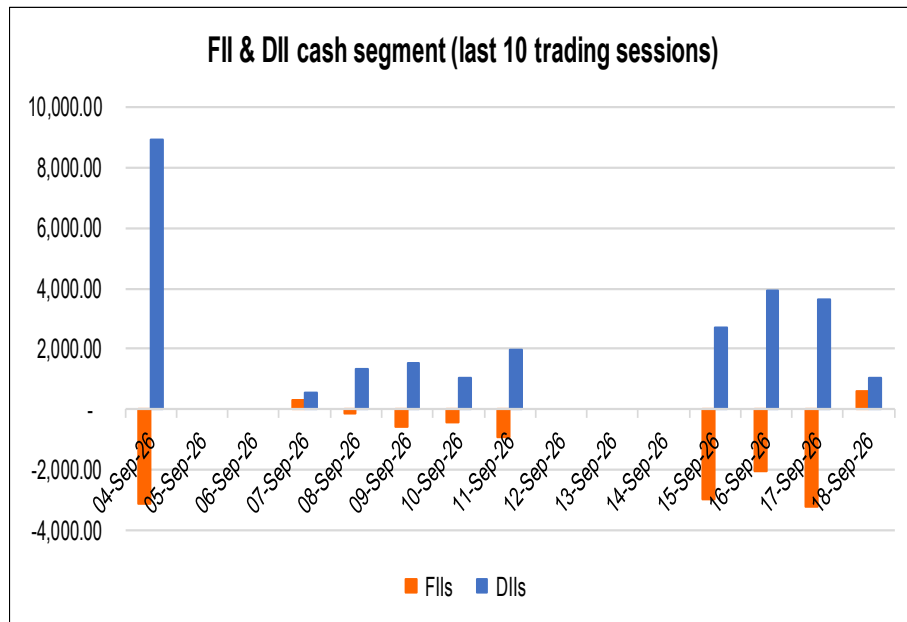
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	18-Sept-2026	MTD	YTD
FII Net Flows	599.54	-7,040.94	-3,66,095.60
DII Net Flows	1,019.69	36,218.68	5,99,723.24

*INR in Crores

FII's F&O Flows	18-Sept-2026	MTD
Index Futures	264.47	-12,362.87
Index Options	4,404.77	-31,447.69
Stock Futures	-2,197.52	-4,198.82
Stock Options	457.24	-588.57



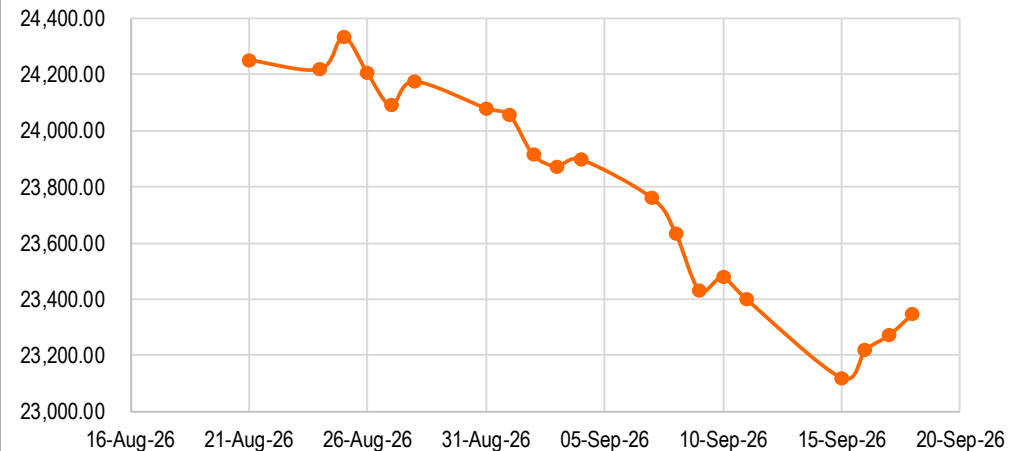


INDEX VIEW

NIFTY

Spot	23346.40
Futures	23378.50
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	0.98
Key Supply Zones	23650, 24000
Key Demand Zones	23200, 23000

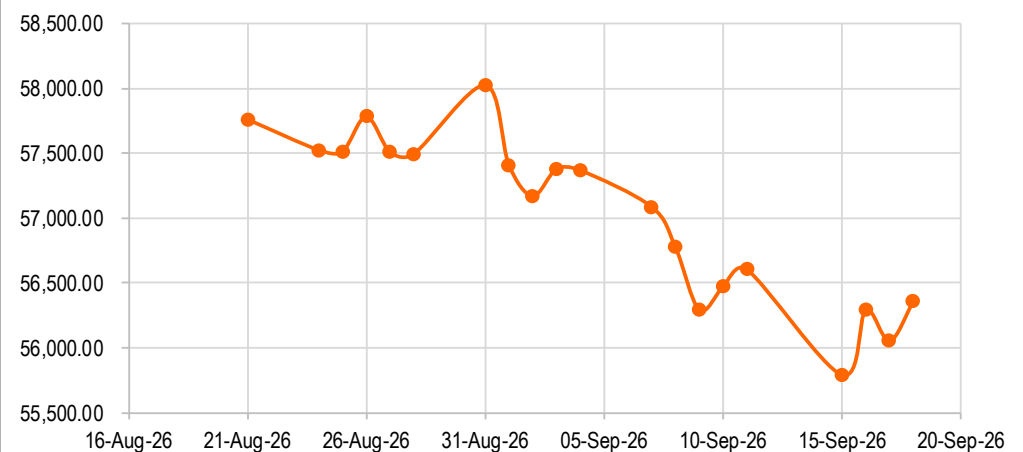
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56358.70
Futures	56527.00
Highest CE OI (29 th SEPT)	58000
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.96
Key Supply Zones	57000, 58500
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	9,351.70	0.86%	-3.83%	-4.89%	Out-performance	Under-performance	Under-performance
Nifty Infrastructure	9,071.30	1.14%	-0.06%	-3.11%	Out-performance	Out-performance	Out-performance
Nifty Energy	37,773.55	1.05%	-0.43%	-1.25%	Out-performance	Under-performance	Out-performance
Nifty Financial Services	25,510.00	0.76%	-0.14%	-2.86%	Out-performance	Out-performance	Out-performance
Nifty IT	28,854.55	-1.03%	-0.23%	-5.49%	Under-performance	Under-performance	Under-performance
Nifty Realty	844.20	1.19%	-0.51%	-7.39%	Out-performance	Under-performance	Under-performance
Nifty FMCG	45,466.80	-0.23%	0.92%	-4.30%	Under-performance	Out-performance	Under-performance
Nifty Pharma	26,710.10	0.49%	0.67%	1.33%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,613.90	0.51%	0.74%	1.16%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,948.70	0.84%	0.11%	-2.09%	Out-performance	Out-performance	Out-performance
Nifty Auto	27,129.00	-0.11%	-0.64%	-6.85%	Under-performance	Under-performance	Under-performance
Nifty Metal	13,052.60	1.51%	0.41%	-0.91%	Out-performance	Out-performance	Out-performance
Nifty PSU Bank	8,317.55	0.66%	-0.39%	-3.51%	Out-performance	Under-performance	Out-performance
Nifty Private Bank	27,290.00	0.44%	-0.53%	-1.09%	Out-performance	Under-performance	Out-performance
Nifty Bank	56,358.70	0.54%	-0.44%	-2.43%	Out-performance	Under-performance	Out-performance
Nifty Consumer Durables	37,848.25	-0.43%	-2.71%	-6.73%	Under-performance	Under-performance	Under-performance

Stocks to watch: ADANI PORT, APLAPOLLO, BHARTIARTL, RADICO.

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



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3020.00	3.31	2997.29	3036.09	2536.23
ADANIPTS	1824.00	4.93	1711.34	1729.63	1614.95
APOLLOHSP	8944.50	2.01	8791.37	8833.40	7950.66
ASIANPAINT	2451.30	-0.11	2538.95	2638.99	2584.23
AXISBANK	1257.00	1.37	1252.35	1253.76	1287.07
BAJAJ_AUTO	11414.00	-0.75	11804.40	11455.51	10110.39
BAJAJFINSV	1852.50	-0.36	1953.41	1958.91	1900.27
BAJFINANCE	1040.30	2.49	1054.29	1067.05	978.46
BEL	393.30	-0.54	404.93	404.16	418.37
BHARTIARTL	1893.30	3.12	1866.46	1910.35	1924.49
CIPLA	1394.50	1.32	1396.21	1424.69	1386.78
COALINDIA	409.90	-1.94	413.76	416.37	430.69
DRREDDY	1185.00	0.85	1163.84	1177.61	1249.41
EICHERMOT	7516.00	0.30	7780.22	7790.96	7399.29
ETERNAL	326.85	1.40	324.52	311.97	275.02
GRASIM	3209.20	1.14	3279.34	3226.93	2957.53
HCLTECH	1249.30	-0.72	1283.07	1290.35	1373.78
HDFCBANK	731.00	2.52	713.36	738.07	828.86
HDFCLIFE	550.95	-1.09	539.57	545.95	632.51
HINDALCO	986.50	0.61	1012.71	1002.36	971.46
HINDUNILVR	1932.00	-0.53	1975.54	2050.86	2207.27
ICICIBANK	1338.90	-0.65	1405.04	1420.29	1356.26
INDIGO	4920.00	1.55	5024.00	5158.92	4843.42
INFY	1051.40	-0.68	1099.28	1113.83	1291.29
ITC	262.30	-1.47	264.44	274.12	309.92

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	229.89	0.26	235.30	242.18	252.81
JSWSTEEL	1275.60	1.77	1300.00	1281.27	1230.03
KOTAKBANK	412.50	-0.96	416.43	399.62	400.73
LT	3885.00	1.27	3974.55	3956.86	3977.22
M&M	3052.00	-0.80	3215.57	3270.71	3311.42
MARUTI	12103.00	-1.90	12897.15	13456.58	14153.75
MAXHEALTH	1049.30	1.19	1014.67	1048.90	1037.30
NESTLEIND	1372.40	0.13	1421.01	1455.89	1356.32
NTPC	323.65	-1.81	331.93	339.33	357.48
ONGC	232.80	0.16	234.56	239.54	256.92
POWERGRID	270.30	2.48	266.80	274.06	283.97
RELIANCE	1226.40	-1.41	1284.70	1296.40	1378.56
SBILIFE	1731.00	-2.03	1732.48	1799.59	1894.90
SBIN	996.20	0.76	1019.88	1035.08	1040.55
SHRIRAMFIN	1010.00	1.51	1055.98	1067.25	999.35
SUNPHARMA	1837.30	-1.61	1893.38	1924.13	1805.81
TATACONSUM	996.00	-1.75	1021.38	1061.46	1121.33
TATASTEEL	185.54	-0.93	185.53	186.31	193.04
TCS	2105.00	-3.88	2267.82	2297.83	2567.95
TECHM	1537.10	-1.53	1578.92	1587.71	1520.23
TITAN	4798.50	-0.88	5019.66	4921.12	4361.07
TMPV	303.80	-3.40	309.55	325.27	347.52
TRENT	2824.00	1.25	2843.07	2912.76	2778.13
ULTRACEMCO	11014.00	2.32	11240.05	11596.62	11733.25
WIPRO	166.83	0.26	174.37	178.30	205.96



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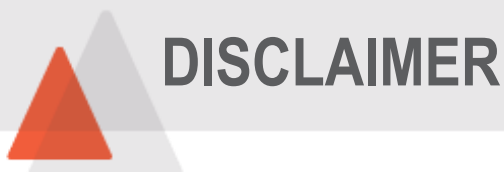
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