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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,863.69	-185.14	-0.36%
S&P 500	7,764.64	-0.06	0.00%
NASDAQ 100	30,732.40	250.04	0.82%
FTSE 100	10,708.33	-30.68	-0.29%
NIKKEI* (8:00 AM)	65,018.95	882.70	1.38%
HANG SENG (8:00 AM)	24,861.50	-226.25	-0.90%
GOLD	4,374.15	-2.25	-0.05%
SILVER	67.05	0.52	0.78%
BRENT OIL	98.84	-0.41	-0.41%
DOLLAR INDEX	100.38	0.06	0.06%
USD/INR	95.64	0.04	0.04%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Oil** prices are heading for their longest losing streak in a year as Saudi Arabia moves to restart a key pipeline. The **dollar** steadied near a two-month high amid expectations of near-term interest rate hikes, while falling oil prices provided some relief on inflation concerns but kept investors cautious amid ongoing geopolitical developments.
- The **Nasdaq** closed at a record high on Tuesday, led by gains in Micron Technology and other AI-related stocks, while the **S&P 500** remained just below its record level. **Asian markets** extended gains in early trade, supported by a rally in chipmakers. The **MSCI Asia Pacific Index** rose 0.3%, marking its sixth consecutive session of gains.
- **GIFT Nifty** trading at ~23,343.00 is indicating a negative start for the Indian market on Wednesday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,329.00	-85.30	-0.36%
SENSEX	74,529.08	-329.91	-0.44%
BANK NIFTY	56,215.55	-255.10	-0.45%
FIN NIFTY	25,417.95	-106.75	-0.42%
NIFTY MIDCAP 100	61,963.15	-49.95	-0.08%
NIFTY SMLCAP 100	19,815.45	-46.05	-0.23%
INDIA VIX	10.98	-0.27	-2.36%

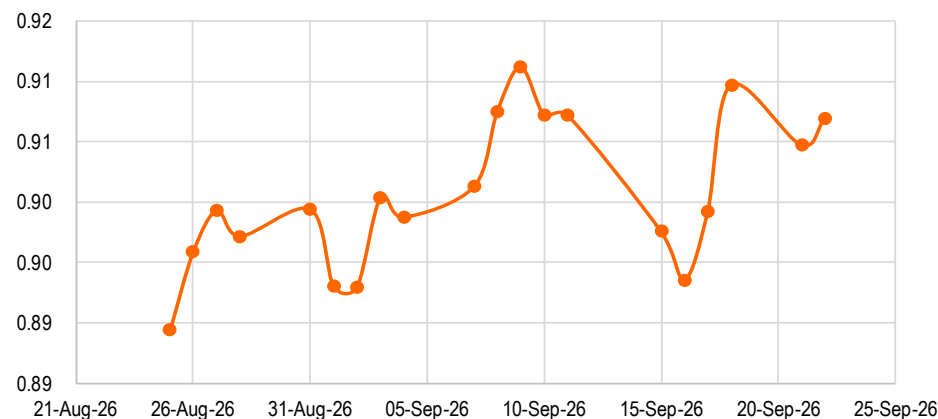
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	15	35	0
NIFTY 500	191	308	1
NIFTY F&O	77	132	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	8	16%
NIFTY 500	166	33%

Highlights

- Nifty faced rejection around the 23,500 mark and closed on a negative note, snapping its four-session winning streak. With 22 stocks outperforming and 28 underperforming Nifty, market breadth remained slightly weak, although the index held up better than the typical stock, suggesting some support from higher-weight constituents.
- FMCG and Financial Services stocks witnessed selling pressure on Tuesday, while COALINDIA gained 3.21% to emerge as the top gainer among the major stocks.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





Persistent Systems

The company has secured 75.68 lakh equity shares, representing approximately 61.15 percent of Nagarro SE's outstanding share capital, through a voluntary public takeover offer. The company had already acquired an approximately 22.10 percent stake in Nagarro under a share purchase agreement with Lantano Beteiligungen GmbH. As a result, Persistent Systems' aggregate shareholding in Nagarro stood at 83.25 percent, excluding treasury shares, as of September 17. Persistent Systems plans to delist Nagarro from the Frankfurt Stock Exchange.

Allcargo Terminals

Allcargo Terminals' total volumes in August 2026 stood at 65,600 TEUs (twenty-foot equivalent units), registering a 6 percent year-on-year growth and a 5 percent increase from the previous month.

360 ONE WAM

The Board of 360 ONE WAM has approved the appointment of Aashish Agarwal as Chief Executive Officer of the company, designated as a key managerial personnel, with effect from February 15, 2027. Karan Bhagat will continue as Managing Director of the company, with no change to his existing tenure until July 26, 2030, as approved earlier, and will be eligible for reappointment. The Board has additionally appointed Karan Bhagat as Vice Chairman and Managing Director with effect from February 15, 2027.

Lemon Tree Hotels

Lemon Tree Hotels has announced the opening of Keys Prima by Lemon Tree Hotels in Nashik, marking the Group's first hotel in the city and further strengthening its presence in Maharashtra. The hotel is managed by Carnation Hotels, a wholly owned subsidiary of Lemon Tree Hotels.



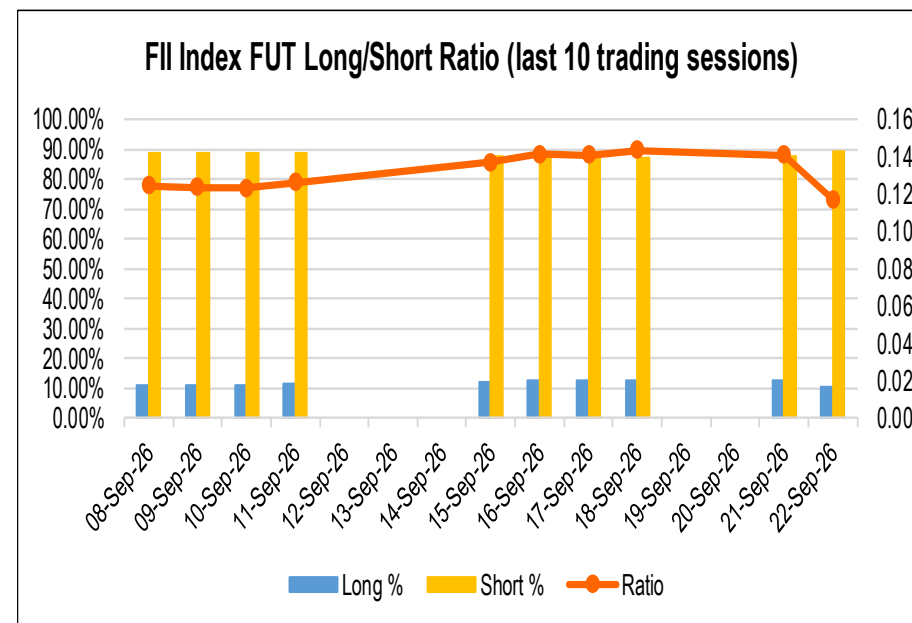
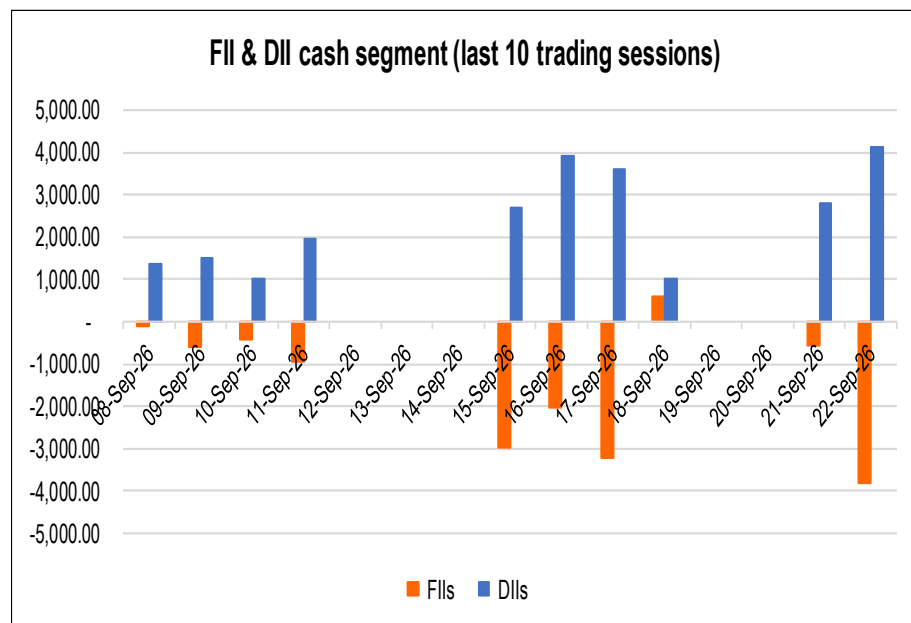
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	22-Sept-2026	MTD	YTD
FII Net Flows	-3,809.99	-11,427.13	-3,70,481.79
DII Net Flows	4,120.07	43,136.02	6,06,640.58

*INR in Crores

FII's F&O Flows	22-Sept-2026	MTD
Index Futures	-1,903.18	-14,594.13
Index Options	-23,213.82	-52,071.82
Stock Futures	340.48	-3,842.69
Stock Options	503.24	-438.90



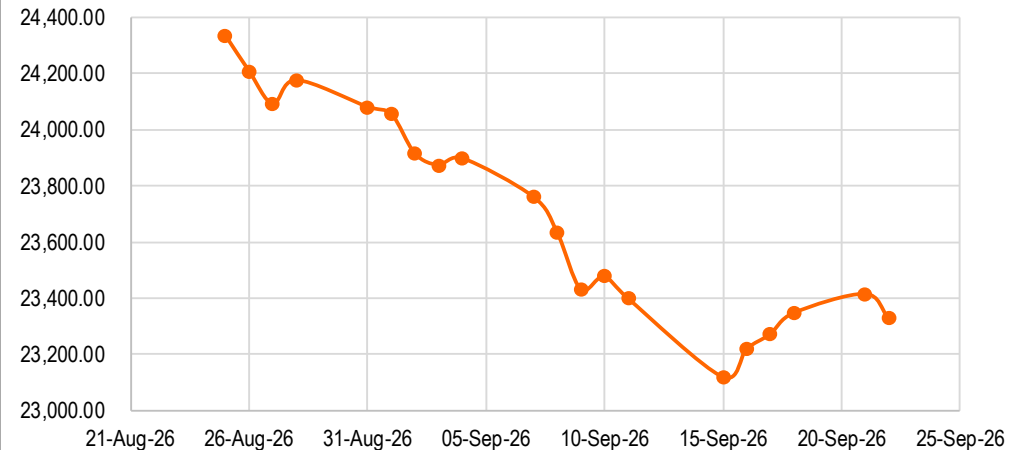


INDEX VIEW

NIFTY

Spot	23329.00
Futures	23394.60
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	0.89
Key Supply Zones	23650, 24000
Key Demand Zones	23200, 23000

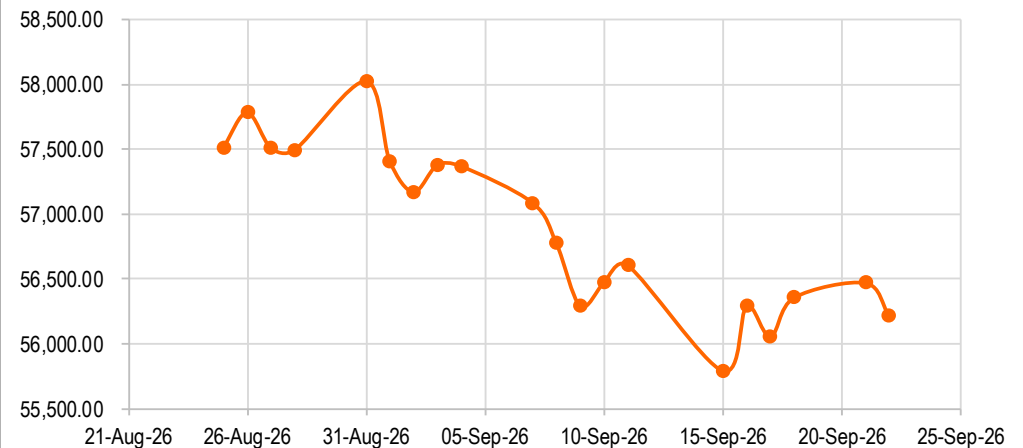
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56215.55
Futures	56491.20
Highest CE OI (29 th SEPT)	58000
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.91
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	9,471.55	0.58%	3.75%	-2.75%	Out-performance	Out-performance	Out-performance
Nifty Infrastructure	9,020.80	-0.41%	1.26%	-3.44%	Under-performance	Out-performance	Out-performance
Nifty Energy	37,727.00	-0.24%	1.46%	-1.59%	Out-performance	Out-performance	Out-performance
Nifty Financial Services	25,417.95	-0.42%	0.62%	-2.83%	Under-performance	Out-performance	Out-performance
Nifty IT	28,582.10	-0.86%	-1.74%	-6.58%	Under-performance	Under-performance	Under-performance
Nifty Realty	861.50	0.90%	4.77%	-6.06%	Out-performance	Out-performance	Under-performance
Nifty FMCG	45,657.75	-0.53%	0.22%	-3.93%	Under-performance	Under-performance	Under-performance
Nifty Pharma	26,909.60	-0.41%	2.92%	2.17%	Under-performance	Out-performance	Out-performance
Nifty Healthcare	16,720.00	-0.46%	2.74%	1.84%	Under-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,958.90	-0.43%	0.80%	-2.13%	Under-performance	Out-performance	Out-performance
Nifty Auto	27,086.30	-0.24%	0.72%	-6.92%	Out-performance	Out-performance	Under-performance
Nifty Metal	12,990.35	0.14%	1.97%	-2.92%	Out-performance	Out-performance	Out-performance
Nifty PSU Bank	8,271.30	-0.49%	-0.06%	-3.14%	Under-performance	Under-performance	Out-performance
Nifty Private Bank	27,286.00	-0.31%	0.01%	-0.78%	Out-performance	Under-performance	Out-performance
Nifty Bank	56,215.55	-0.45%	-0.14%	-2.28%	Under-performance	Under-performance	Out-performance
Nifty Consumer Durables	37,962.20	-0.64%	-0.06%	-6.16%	Under-performance	Under-performance	Under-performance

Stocks to watch: RBLBANK, SWIGGY.

Stocks in F&O ban: KAYNES, LICHSGFIN, MANAPPURAM, SAIL.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2997.00	0.74	2996.11	3028.83	2543.38
ADANIPTS	1795.00	0.44	1721.84	1728.51	1617.62
APOLLOHSP	8835.50	-0.86	8809.00	8835.88	7966.29
ASIANPAINT	2448.50	0.34	2519.35	2630.17	2579.97
AXISBANK	1242.70	-0.58	1252.89	1250.75	1286.76
BAJAJ_AUTO	11363.00	-0.85	11770.55	11501.23	10133.66
BAJAJFINSV	1823.40	-1.43	1935.36	1955.89	1897.76
BAJFINANCE	1008.80	-1.22	1047.19	1066.79	978.32
BEL	397.90	-0.15	403.60	403.57	418.21
BHARTIARTL	1817.20	-0.71	1854.78	1906.86	1921.77
CIPLA	1384.10	-0.14	1391.21	1422.77	1385.36
COALINDIA	428.00	3.21	415.29	416.04	431.12
DRREDDY	1211.00	1.06	1166.07	1176.22	1248.86
EICHERMOT	7427.00	-1.14	7724.35	7796.51	7403.09
ETERNAL	342.00	1.82	325.66	314.03	275.41
GRASIM	3128.20	-1.19	3264.25	3225.66	2961.64
HCLTECH	1270.40	-0.83	1279.42	1293.67	1370.20
HDFCBANK	738.60	-0.12	714.46	734.78	826.20
HDFCLIFE	559.20	-0.04	540.11	545.50	630.45
HINDALCO	973.00	-0.84	1005.80	1002.76	973.13
HINDUNILVR	1933.80	-0.68	1967.33	2042.85	2202.40
ICICIBANK	1339.60	-0.40	1397.52	1417.76	1355.79
INDIGO	5030.00	1.80	5011.30	5147.51	4834.79
INFY	1029.40	-0.88	1090.13	1111.77	1286.01
ITC	265.80	-0.45	264.13	273.54	308.54

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	230.70	0.32	234.03	241.73	252.06
JSWSTEEL	1267.00	-0.13	1295.75	1282.33	1231.07
KOTAKBANK	412.65	-0.52	417.59	400.92	400.60
LT	3866.40	-0.98	3953.96	3954.80	3975.36
M&M	3044.50	-0.35	3179.24	3266.91	3304.43
MARUTI	12190.00	0.30	12755.05	13392.46	14115.48
MAXHEALTH	1056.50	-0.95	1021.30	1047.08	1036.48
NESTLEIND	1363.90	-1.52	1411.04	1453.23	1357.46
NTPC	327.80	0.43	330.67	338.49	357.48
ONGC	236.13	0.21	234.50	239.11	256.84
POWERGRID	265.95	-0.06	266.21	273.32	283.93
RELIANCE	1240.40	-0.56	1277.80	1294.06	1375.33
SBILIFE	1756.30	0.02	1730.36	1795.46	1892.77
SBIN	987.00	-0.90	1014.62	1033.28	1040.70
SHRIRAMFIN	1006.00	-0.57	1044.42	1065.77	1000.92
SUNPHARMA	1846.40	-1.20	1888.53	1921.30	1806.19
TATACONSUM	984.10	-1.65	1015.04	1056.94	1119.58
TATASTEEL	184.97	0.86	185.48	186.11	193.20
TCS	2105.00	-1.11	2250.20	2297.50	2557.76
TECHM	1551.60	-0.44	1576.03	1590.73	1520.54
TITAN	4928.50	1.10	5001.58	4933.47	4371.07
TMPV	300.05	-0.53	308.02	323.70	346.92
TRENT	2782.90	-1.16	2831.54	2908.67	2777.90
ULTRACEMCO	11000.00	-0.90	11191.35	11572.98	11727.44
WIPRO	166.00	0.88	172.79	177.83	205.11



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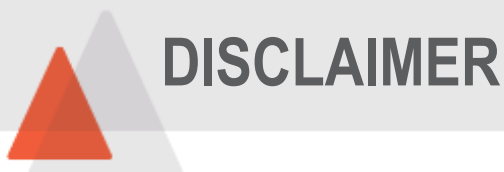
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