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DAILY TECHNICAL & DERIVATIVES REPORT

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24th September, 2026

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,511.59	-352.10	-0.68%
S&P 500	7,706.03	-58.61	-0.75%
NASDAQ 100	30,470.29	-262.10	-0.85%
FTSE 100	10,705.26	-3.07	-0.03%
NIKKEI (8:00 AM)	66,027.00	1,008.05	1.55%
HANG SENG (8:00 AM)	24,758.00	-76.12	-0.31%
GOLD	4,327.47	9.07	0.21%
SILVER	64.66	-0.31	-0.47%
BRENT OIL	102.23	-0.85	-0.82%
DOLLAR INDEX	100.84	0.03	0.03%
USD/INR	95.97	0.03	0.04%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **US 10-Year Treasury yield** touched its highest levels at 5.135% in nearly two decades. Expectations of further Federal Reserve rate hikes also increased.
- The **dollar** held near a two-month high on Thursday after strong manufacturing data reignited inflation concerns and rate-hike expectations.
- **Wall Street** ended lower on Wednesday, weighed down by declines in Alphabet and Amazon as Treasury yields climbed. Geopolitical tensions also remained elevated after Iran's president said Tehran would not surrender to U.S. pressure.
- **GIFT Nifty** trading at ~23,283.00 is indicating a negative start for the Indian market on Thursday.



MARKET SNAPSHOT

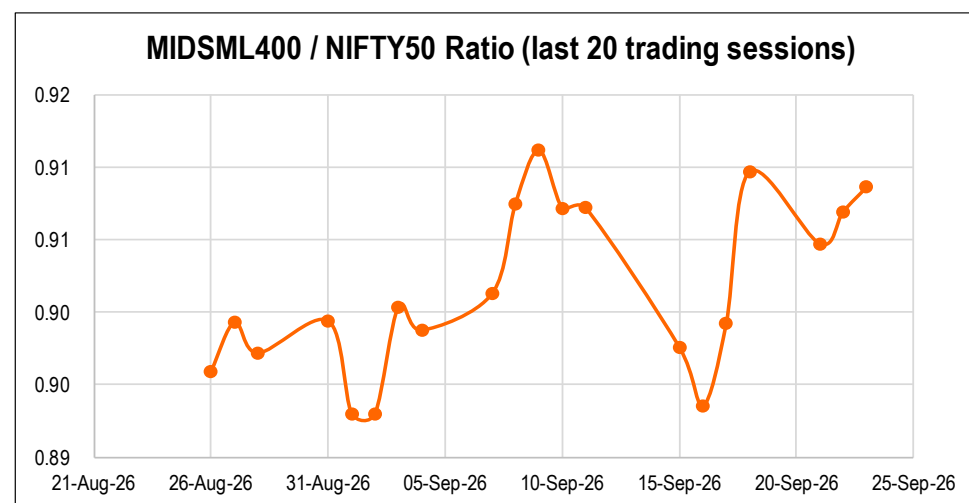
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,446.80	117.80	0.50%
SENSEX	74,828.25	299.17	0.40%
BANK NIFTY	56,548.90	333.35	0.59%
FIN NIFTY	25,564.85	146.90	0.58%
NIFTY MIDCAP 100	62,396.45	433.30	0.70%
NIFTY SMLCAP 100	19,991.50	176.05	0.89%
INDIA VIX	10.37	-0.63	-5.73%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	36	14	0
NIFTY 500	341	158	1
NIFTY F&O	157	52	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	12	24%
NIFTY 500	193	39%

Highlights

- Nifty gained 117 points on Wednesday, extending its rebound and eventually hovering around the 23,500 mark. The index continued to show strength after recovering from the lower levels. Metal stocks witnessed sharp buying interest, with TATASTEEL and HINDALCO bouncing strongly from their lower levels and supporting the broader market recovery.
- 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 than by broad-based participation.





Ola Electric Mobility

Ola Electric Mobility is seeking Board approval for a proposed rights issue of equity shares.

Bharat Dynamics

Bharat Dynamics has signed a contract with the Ministry of Defence for the supply of Satellite Smart Anti-Airfield Weapons (SAT-SAAW), along with associated equipment, to the Indian Air Force (IAF), at a total cost of Rs 810.79 crore.

Exide Industries

Exide Energy Solutions (EESL), a material subsidiary of Exide Industries, has completed the commissioning of Phase-I of its 6 GWh lithium-ion cell manufacturing facility located in Devanahalli, Bengaluru. The facility has been established to manufacture advanced lithium-ion cells across multiple chemistries and form factors, enabling EESL to serve a wide range of mobility and energy storage applications.



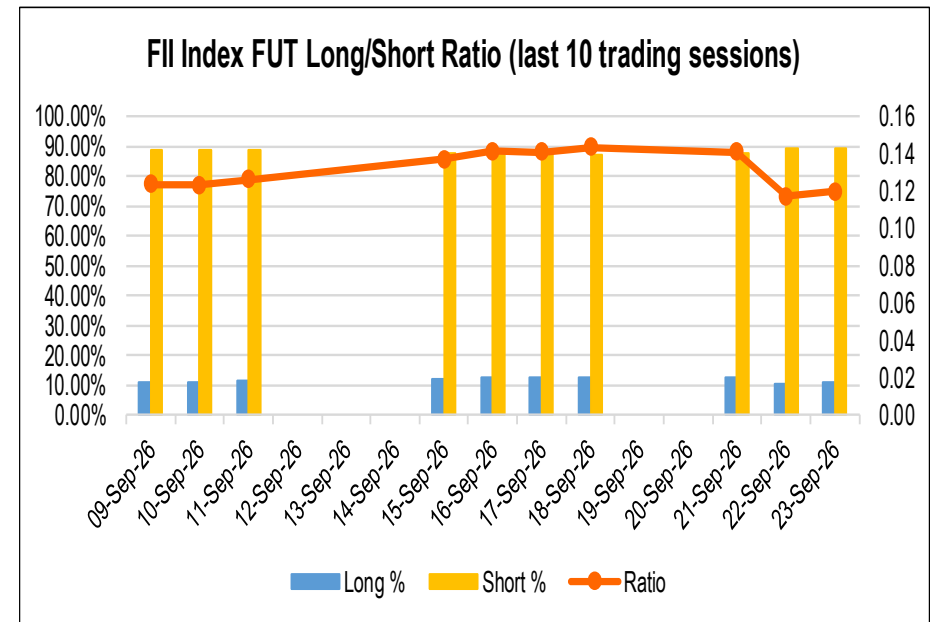
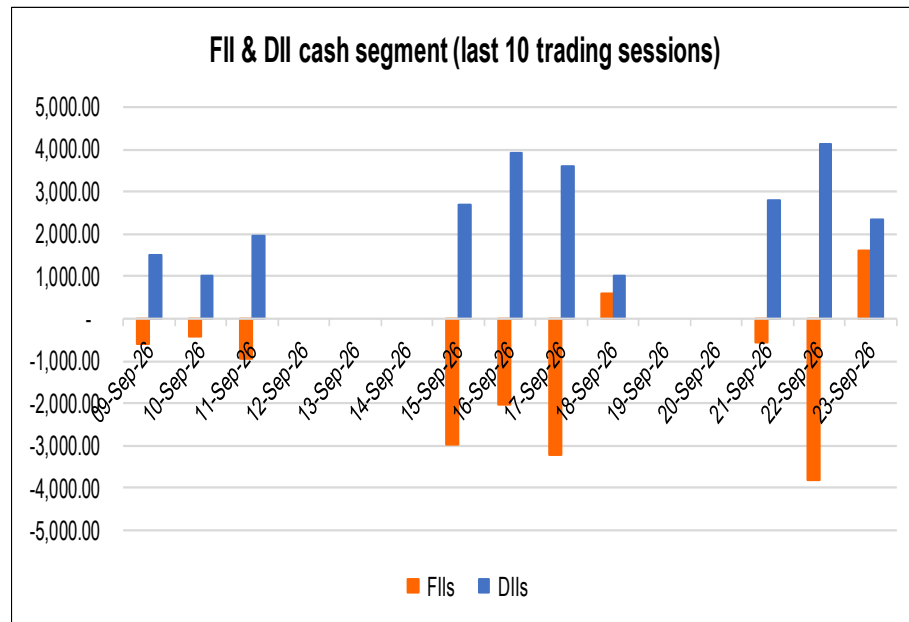
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	23-Sept-2026	MTD	YTD
FII Net Flows	1,617.45	-9,809.68	-3,68,864.34
DII Net Flows	2,341.46	45,477.48	6,08,982.04

*INR in Crores

FII's F&O Flows	23-Sept-2026	MTD
Index Futures	678.98	-13,915.15
Index Options	-3,906.15	-55,977.97
Stock Futures	349.05	-3,493.64
Stock Options	-57.85	-496.75



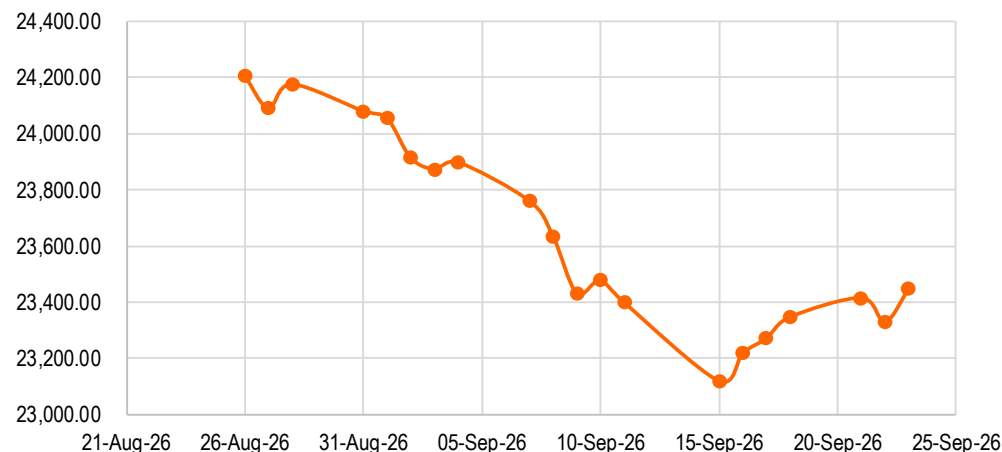


INDEX VIEW

NIFTY

Spot	23446.80
Futures	23449.80
Highest CE OI (29 th SEPT)	24000
Highest PE OI (29 th SEPT)	23000
PCR (29 th SEPT)	1.01
Key Supply Zones	23650, 24000
Key Demand Zones	23200, 23000

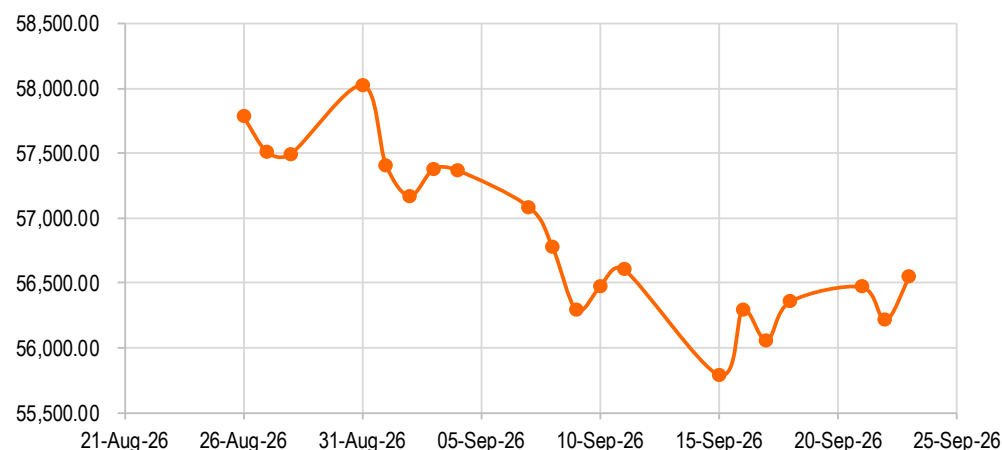
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	56548.90
Futures	56685.80
Highest CE OI (29 th SEPT)	57500
Highest PE OI (29 th SEPT)	57500
PCR (29 th SEPT)	0.93
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	9,461.30	-0.11%	2.04%	-3.09%	Under-performance	Out-performance	Out-performance
Nifty Infrastructure	9,095.05	0.82%	1.40%	-3.26%	Out-performance	Out-performance	Out-performance
Nifty Energy	37,759.75	0.09%	1.01%	-1.44%	Under-performance	Out-performance	Out-performance
Nifty Financial Services	25,564.85	0.58%	0.97%	-2.60%	Out-performance	Out-performance	Out-performance
Nifty IT	28,334.05	-0.87%	-2.82%	-7.92%	Under-performance	Under-performance	Under-performance
Nifty Realty	871.00	1.10%	4.41%	-5.10%	Out-performance	Out-performance	Under-performance
Nifty FMCG	46,259.35	1.32%	1.51%	-3.03%	Out-performance	Out-performance	Out-performance
Nifty Pharma	27,152.10	0.90%	2.16%	2.21%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,868.15	0.89%	2.05%	1.63%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	11,005.20	0.42%	1.36%	-1.87%	Under-performance	Out-performance	Out-performance
Nifty Auto	27,157.55	0.26%	-0.01%	-7.05%	Under-performance	Under-performance	Under-performance
Nifty Metal	13,302.35	2.40%	3.45%	-0.52%	Out-performance	Out-performance	Out-performance
Nifty PSU Bank	8,365.45	1.14%	1.24%	-2.77%	Out-performance	Out-performance	Out-performance
Nifty Private Bank	27,363.35	0.28%	0.71%	-0.31%	Under-performance	Under-performance	Out-performance
Nifty Bank	56,548.90	0.59%	0.88%	-1.68%	Out-performance	Out-performance	Out-performance
Nifty Consumer Durables	38,200.20	0.63%	0.50%	-6.44%	Out-performance	Under-performance	Under-performance

Stocks to watch: APOLLOHOSP, BAJFINANCE, HINDALCO, POLICYBZR.

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



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2993.20	-0.13	2990.27	3024.92	2547.15
ADANIPTS	1807.30	0.69	1727.07	1728.22	1619.07
APOLLOHSP	9069.00	2.64	8818.00	8839.25	7975.42
ASIANPAINT	2455.00	0.27	2510.11	2626.45	2577.47
AXISBANK	1243.20	0.04	1253.30	1249.27	1286.69
BAJAJ_AUTO	11400.00	0.33	11744.20	11525.91	10145.23
BAJAJFINSV	1846.50	1.27	1927.49	1955.43	1896.66
BAJFINANCE	1043.20	3.41	1044.98	1067.52	978.41
BEL	396.05	-0.46	402.74	403.29	418.13
BHARTIARTL	1833.20	0.88	1849.09	1904.79	1920.42
CIPLA	1383.00	-0.08	1389.26	1421.67	1384.69
COALINDIA	424.55	-0.81	416.31	415.91	431.35
DRREDDY	1211.20	0.02	1166.95	1175.52	1248.54
EICHERMOT	7470.00	0.58	7695.10	7800.32	7404.88
ETERNAL	342.65	0.19	326.24	315.16	275.62
GRASIM	3188.50	1.93	3259.20	3227.16	2963.91
HCLTECH	1256.70	-1.08	1276.46	1295.47	1368.30
HDFCBANK	737.25	-0.18	714.95	733.33	824.94
HDFCLIFE	561.50	0.41	540.85	545.63	629.46
HINDALCO	1003.80	3.17	1003.44	1003.35	974.12
HINDUNILVR	1950.00	0.84	1963.62	2039.45	2199.95
ICICIBANK	1340.00	0.03	1393.38	1416.41	1355.63
INDIGO	5028.50	-0.03	5001.83	5145.92	4831.45
INFY	1020.50	-0.86	1083.95	1110.32	1283.31
ITC	270.15	1.64	264.06	273.44	307.89

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	232.15	0.63	233.48	241.65	251.69
JSWSTEEL	1297.80	2.43	1294.62	1283.33	1231.75
KOTAKBANK	413.25	0.15	418.18	401.61	400.52
LT	3929.90	1.64	3944.51	3956.42	3974.86
M&M	3035.00	-0.31	3158.84	3265.75	3301.02
MARUTI	12230.00	0.33	12682.65	13367.28	14095.43
MAXHEALTH	1059.90	0.32	1023.50	1046.42	1036.19
NESTLEIND	1387.20	1.71	1406.45	1452.43	1358.10
NTPC	326.00	-0.55	329.97	338.05	357.47
ONGC	236.90	0.33	234.65	238.87	256.81
POWERGRID	270.20	1.60	266.17	273.00	283.94
RELIANCE	1248.00	0.61	1274.35	1293.16	1373.84
SBILIFE	1760.00	0.21	1730.61	1793.85	1891.66
SBIN	994.10	0.72	1011.93	1032.86	1040.83
SHRIRAMFIN	1010.80	0.48	1038.03	1065.70	1001.76
SUNPHARMA	1865.00	1.01	1885.68	1919.75	1806.52
TATACONSUM	994.30	1.04	1011.73	1054.88	1118.74
TATASTEEL	190.82	3.16	185.68	186.16	193.31
TCS	2089.60	-0.73	2239.87	2295.28	2552.53
TECHM	1557.00	0.35	1573.88	1592.18	1520.65
TITAN	4880.00	-0.98	4989.34	4939.59	4376.05
TMPV	300.50	0.15	307.34	323.04	346.62
TRENT	2774.00	-0.32	2823.74	2906.77	2777.68
ULTRACEMCO	11155.00	1.41	11172.10	11566.16	11724.88
WIPRO	164.90	-0.66	172.03	177.59	204.68



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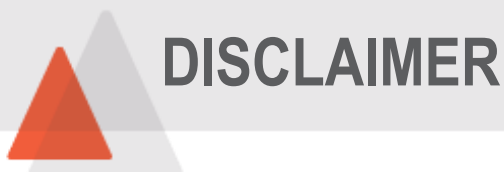
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