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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	46,124.06	-84.41	-0.18%
S&P 500	6,556.37	-24.63	-0.37%
NASDAQ 100	24,002.45	-186.14	-0.77%
FTSE 100	9,965.16	71.01	0.72%
NIKKEI (8:00 AM)	53,576.00	1,323.72	2.53%
HANG SENG (8:00 AM)	25,219.00	155.29	0.62%
GOLD	4,624.90	190.80	4.30%
SILVER	74.11	4.54	6.53%
BRENT OIL	95.15	-5.08	-5.07%
DOLLAR INDEX	99.06	-0.18	-0.18%
USD/INR	93.84	-0.17	-0.19%

*Closed

*Source: investing.com, moneycontrol.com

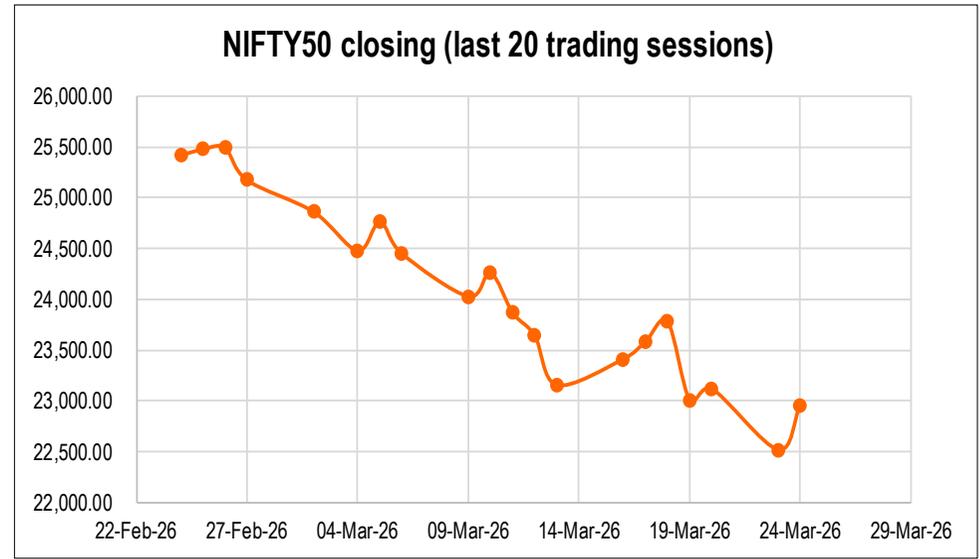
Global updates

- **U.S. indices** ended lower in a volatile Tuesday session as investors balanced concerns over rising oil prices with hopes of a diplomatic resolution to the U.S.–Israel conflict with Iran, even as reports indicated additional troop deployment to the Middle East. **Asian equities** traded higher, earlier on Wednesday following reports that the U.S. is pushing for a month-long ceasefire, including a proposed plan to restore oil exports from the Persian Gulf, boosting risk sentiment.
- **Gold** rebounded, snapping a nine-day losing streak, as renewed diplomatic efforts revived safe-haven demand amid lingering geopolitical uncertainty.
- **GIFT Nifty** trading at ~23,085.00 is indicating a positive start for the Indian market on Wednesday.

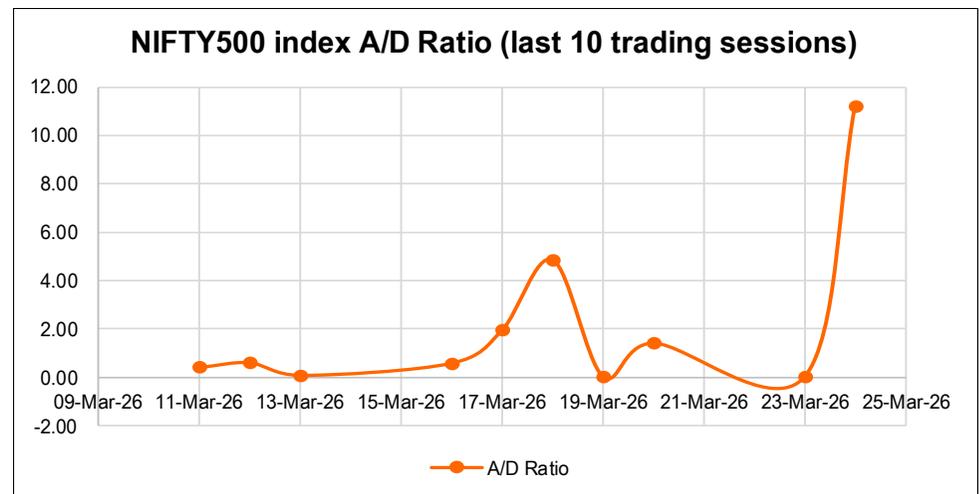


MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,958.40	445.75	1.98%
SENSEX	74,068.45	1,372.06	1.89%
BANK NIFTY	52,743.45	1,305.70	2.54%
FIN NIFTY	24,548.60	589.40	2.46%
MIDCAP NIFTY	12,533.75	350.20	2.87%
NIFTY SMLCAP 250	14,570.90	338.05	2.38%
INDIA VIX	24.91	-1.82	-6.82%



INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	45	5	0
NIFTY 500	459	41	0
NIFTY F&O	199	7	0



INDEX	SCRIPTS TRADING ABOVE 20 DSMA
NIFTY 50	5
NIFTY 500	64



Tata Steel

The company has acquired 178.57 crore shares worth up to US\$180 million (Rs 1,680.27 crore) in its subsidiary, Tata Steel Holdings.

HDFC Life Insurance Company

The company has received a tax order of Rs 126.46 crore and a penalty of Rs 45.55 crore for AY 2023–24 from the Assistant Commissioner of Income Tax, Mumbai.

Bharat Petroleum Corporation

NeuEN Green Energy, a 50:50 joint venture between Bharat Petroleum Corporation and Sembcorp Green Hydrogen India (a wholly owned subsidiary of Sembcorp Industries), has secured a contract to supply 10,000 tonnes per annum (10 KTPA) of green hydrogen to Numaligarh Refinery (NRL). Additionally, BPCL has commissioned its second-generation bioethanol refinery at Bargarh.

TVS Motor Company

The company has received Board approval for the payment of an interim dividend of Rs 12 per share.

Waaree Energies

The Board has approved an increase in the company's equity stake in its subsidiary, Waaree Transpower, from 64.04 percent to 75.10 percent. Additionally, the Board has approved capital expenditure of Rs 3,900 crore for a glass manufacturing plant in its wholly owned subsidiary, Waaree Green Glass, with a capacity of 2,500 TPD. The capex will be funded through a mix of debt and internal accruals.



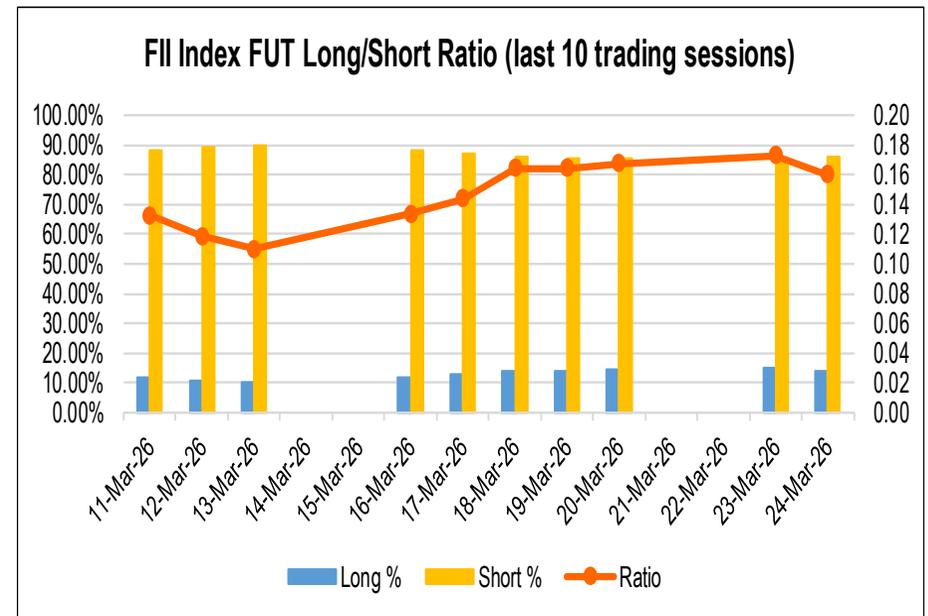
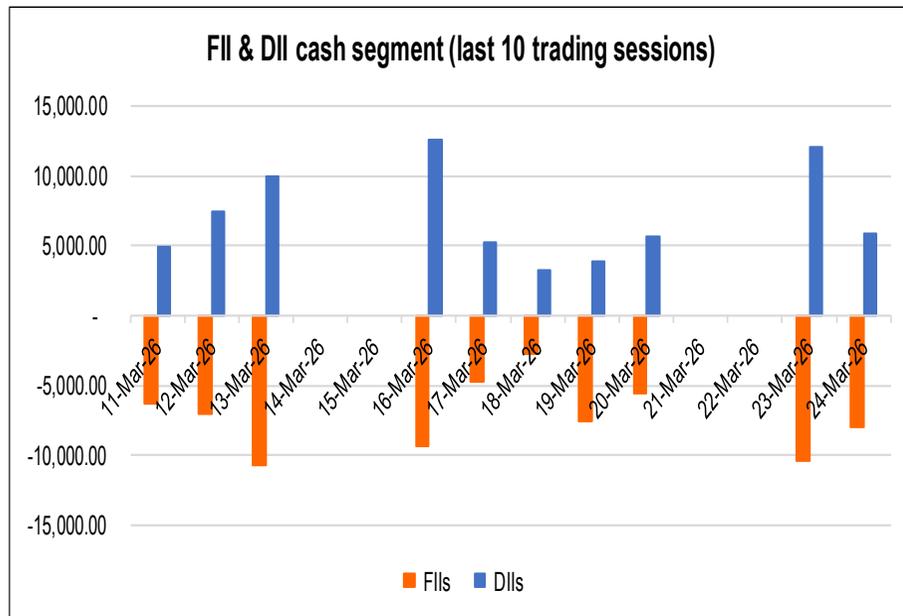
INSTITUTIONAL ACTIVITY

*INR in Crores

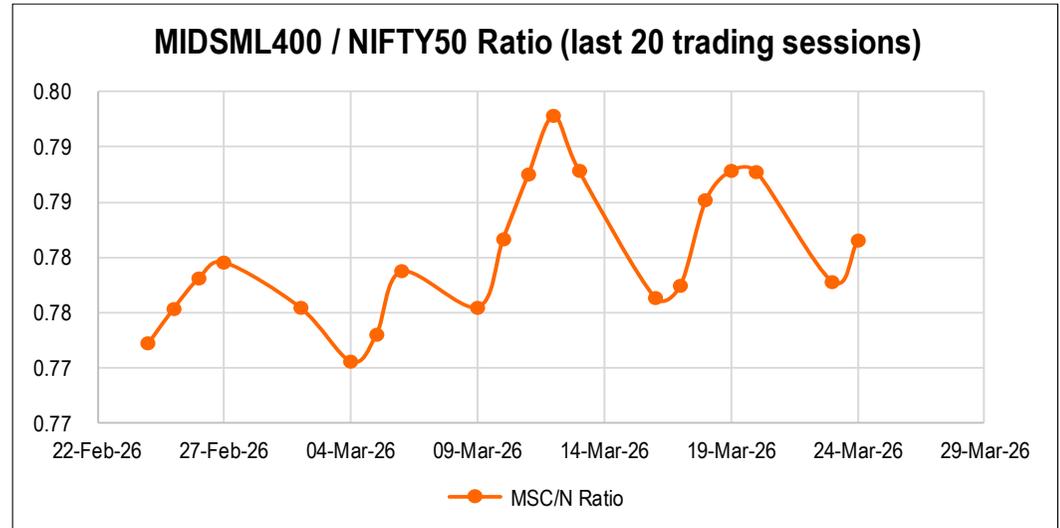
Cash Segment	24-3-2026	MTD	YTD
FII Net Flows	-8,009.56	-1,05,204.68	-1,53,280.68
DII Net Flows	5,867.15	1,19,069.72	2,26,713.57

*INR in Crores

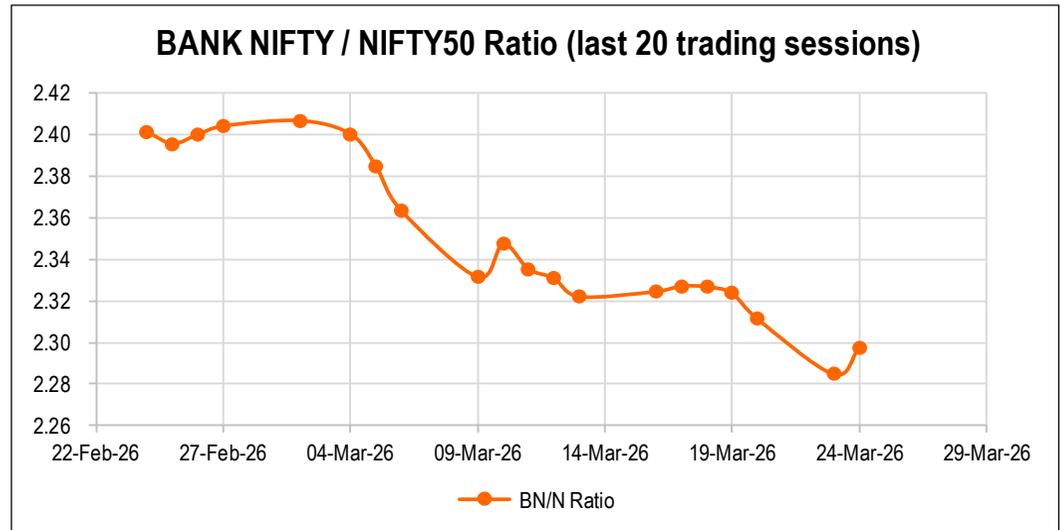
FII's F&O Flows	24-3-2026	MTD
Index Futures	-772.28	-19,691.04
Index Options	-30,102.15	-1,25,874.05
Stock Futures	-258.50	-12,571.66
Stock Options	-543.76	-2,835.11



NIFTY	
Spot	22958.40
Futures	22928.40
Highest CE OI (30 th MAR)	24000
Highest PE OI (30 th MAR)	20000
PCR (30 th MAR)	1.05
Key Supply Zones	23100, 23350
Key Demand Zones	22600, 22450



BANK NIFTY	
Spot	52743.45
Futures	52707.60
Highest CE OI (30 th MAR)	61000
Highest PE OI (30 th MAR)	59000
PCR (30 th MAR)	0.75
Key Supply Zones	53300, 54700
Key Demand Zones	51850, 51200





Index Trading View

- **Nifty** formed a Doji candlestick pattern on weekly expiry, indicating indecision as the index failed to sustain above the 23,000 mark. The 22,600 level is seen as an immediate support for Wednesday, while a fresh breakout above 23,100 could open the path for an upside move towards the 23,350 level.
- **Bank Nifty** has formed a Spinning Top candlestick pattern on its daily chart. However, the failure of price to challenge 53000 level on Tuesday, suggests a continued lack of conviction among buyers. The 53,300 level will act as a decisive short-term resistance, while 51,850 is expected to provide intraday support.

Stocks in Bullish Momentum

ALKEM.

Stocks in Bearish Momentum

LODHA, PIIND.

Stocks in F&O ban list

SAIL, SAMMAANCAP.



SECTORAL BREADTH

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty Media	1,293.60	3.21%	-1.09%	-8.73%	-10.46%
Nifty Private Bank	25,102.80	2.72%	-3.70%	-13.38%	-12.60%
Nifty Auto	24,543.60	2.54%	-2.28%	-13.78%	-12.93%
Nifty Bank	52,743.45	2.54%	-3.89%	-13.60%	-11.48%
Nifty Financial Services	24,548.60	2.46%	-4.57%	-13.38%	-11.10%
Nifty Consumer Durables	33,623.50	2.06%	-4.45%	-10.38%	-8.52%
Nifty Infrastructure	8,748.80	2.04%	-1.30%	-9.01%	-9.02%
Nifty Metal	11,075.55	1.95%	-4.83%	-10.68%	-0.82%
Nifty PSU Bank	8,386.35	1.88%	-2.45%	-14.31%	-1.72%
Nifty IT	29,686.35	1.85%	3.22%	-2.75%	-21.64%
Nifty Realty	674.80	1.72%	-5.12%	-15.32%	-23.14%
Nifty FMCG	46,529.40	1.51%	-3.27%	-10.70%	-16.13%
Nifty Oil & Gas	10,892.55	1.44%	-2.11%	-10.64%	-10.94%
Nifty Healthcare	14,220.00	1.00%	-1.52%	-4.55%	-2.87%
Nifty Pharma	22,219.35	0.75%	-1.67%	-3.61%	-2.22%
Nifty Energy	35,098.25	0.74%	-2.45%	-5.44%	-0.64%

Sector Analysis

- Markets may see a relief rally, but sustainability will depend on actual progress in geopolitical negotiations and crude oil stability. Rising gold prices may indicate lingering caution, suggesting that volatility may persist despite near-term optimism. Potential resumption of oil exports from the Persian Gulf could cool crude prices, benefiting oil-sensitive sectors like **OMCs, aviation, and paints.**
- **Nifty Private Bank** Index has filled the recent gap near the 25,600 level, which now emerges as a crucial make-or-break zone in the near term. A decisive breakout above 25,600 could revive bullish sentiment and trigger an extended bounce in private banking stocks.
- **Nifty Auto** Index found support around the 24,000 zone, where it formed a Doji candlestick pattern on Tuesday, indicating indecision near support. A breakout above 24,750 on Wednesday could lead to renewed positive momentum, resulting in a short-term rebound in auto stocks.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	1817.90	-0.82	2026.60	2087.59	2297.75
ADANIPTS	1344.20	3.11	1427.93	1453.51	1435.26
APOLLOHOSP	7413.00	3.75	7604.15	7364.45	7422.58
ASIANPAINT	2217.30	4.53	2267.47	2423.13	2514.88
AXISBANK	1192.70	1.89	1285.96	1311.95	1213.65
BAJAJ_AUTO	8898.00	1.39	9423.12	9527.16	8970.39
BAJAJFINSV	1704.40	1.72	1844.90	1937.67	2005.85
BAJFINANCE	849.00	4.48	916.51	946.05	965.77
BEL	414.45	2.21	442.67	435.47	410.09
BHARTIARTL	1802.10	0.35	1854.56	1942.83	1976.22
CIPLA	1219.40	-0.20	1305.28	1333.18	1477.24
COALINDIA	442.10	-2.89	447.37	435.00	399.63
DRREDDY	1259.60	0.50	1294.77	1257.40	1264.61
EICHERMOT	6871.00	2.84	7337.87	7385.92	6698.00
ETERNAL	237.94	4.84	234.76	262.36	291.17
GRASIM	2549.40	0.72	2704.60	2784.21	2786.59
HCLTECH	1373.30	1.08	1353.20	1507.47	1551.26
HDFCBANK	764.90	2.79	843.89	894.76	963.03
HDFCLIFE	603.00	1.84	662.86	698.58	748.30
HINDALCO	854.65	1.71	924.99	935.17	800.87
HINDUNILVR	2085.00	1.60	2206.35	2305.78	2394.79
ICICIBANK	1251.20	2.33	1310.30	1357.97	1391.01
INDIGO	4150.80	5.21	4401.82	4667.25	5393.98
INFY	1278.30	1.71	1276.40	1437.95	1516.18
ITC	291.25	0.28	307.48	316.77	384.35

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	232.70	2.92	241.93	255.58	295.77
JSWSTEEL	1133.70	2.17	1197.57	1208.76	1125.48
KOTAKBANK	366.85	2.89	389.86	408.13	417.06
LT	3516.80	5.22	3806.22	3937.52	3813.71
M&M	3031.30	2.55	3208.78	3407.16	3435.38
MARUTI	12464.00	0.88	13622.80	14613.88	14741.82
MAXHEALTH	969.20	1.29	1025.59	1024.15	1133.77
NESTLEIND	1183.20	1.41	1238.51	1276.09	1229.82
NTPC	375.55	0.85	379.45	365.31	341.85
ONGC	268.05	0.98	271.59	264.95	247.76
POWERGRID	299.00	-1.03	299.48	285.39	283.41
RELIANCE	1411.80	0.28	1397.04	1413.98	1448.18
SBILIFE	1836.00	0.20	1952.83	2004.17	1916.49
SBIN	1030.80	-0.11	1115.82	1106.90	934.90
SHRIRAMFIN	903.60	2.95	1012.30	1018.31	796.96
SUNPHARMA	1753.30	-0.29	1778.39	1717.89	1694.65
TATACONSUM	1053.10	2.88	1097.83	1133.04	1126.59
TATASTEEL	190.79	1.93	197.96	196.85	174.46
TCS	2398.80	0.63	2497.75	2802.96	3073.45
TECHM	1432.70	3.52	1354.34	1519.95	1527.78
TITAN	3899.50	1.20	4161.52	4146.84	3778.78
TMPV	311.20	1.95	340.53	353.81	387.13
TRENT	3365.60	0.27	3670.83	3860.92	4678.60
ULTRACEMCO	10764.00	3.88	11652.65	12242.08	12117.10
WIPRO	188.74	0.64	196.38	219.05	244.59

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