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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,361.58	146.42	0.28%
S&P 500	7,676.77	53.09	0.70%
NASDAQ 100	29,273.41	315.88	1.09%
FTSE 100	10,767.33	76.97	0.72%
NIKKIE (8:00 AM)	63,290.00	1,100.35	1.77%
HANG SENG (8:00 AM)	23,145.00	-66.81	-0.29%
GOLD	4,026.05	-12.35	-0.31%
SILVER	53.79	-0.55	-1.01%
BRENT OIL	109.64	-1.10	-0.99%
DOLLAR INDEX	101.88	0.08	0.07%
USD/INR	95.39	0.21	0.22%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- U.S. stocks closed higher on Monday, with the S&P 500 and **Nasdaq** rebounding after consecutive weekly declines. Anthropic's IPO filing lifted sentiment in AI-related stocks ahead of a week packed with key market events.
- **USD/INR** rose for the third consecutive session on Monday after rebounding from the 94.30 demand zone last week.
- **Oil prices** edged lower on Tuesday amid hopes of a resolution to the U.S.-Israeli conflict with Iran. However, Brent remained near six-month highs as attacks on Saudi Arabia kept regional supply risks elevated.
- **GIFT Nifty** trading at ~22,667.00 is indicating a negative start for the Indian market on Tuesday.

MARKET SNAPSHOT

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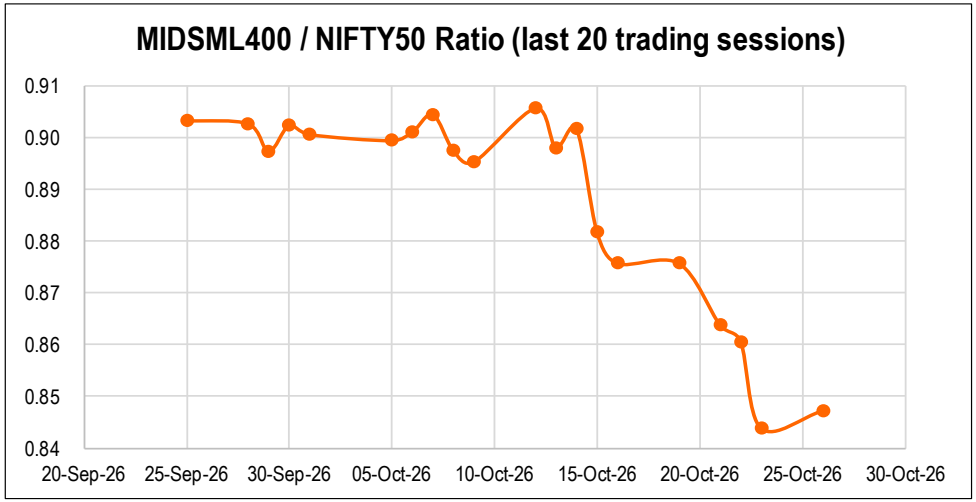
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,753.20	153.20	0.68%
SENSEX	73,606.75	482.92	0.66%
BANK NIFTY	54,366.70	79.35	0.15%
FIN NIFTY	24,454.35	51.35	0.21%
NIFTY MIDCAP 100	56,465.40	664.75	1.19%
NIFTY SMLCAP 100	17,985.00	245.55	1.38%
INDIA VIX	17.13	0.27	1.57%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	37	13	0
NIFTY 500	336	164	0
NIFTY F&O	157	56	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	12	24%
NIFTY 500	64	13%

Highlights

- Nifty rebounded from the 22,400 mark on Monday and closed near the day's high, indicating strong buying interest at lower levels.
- Most sectoral indices ended in positive territory, with Nifty Metal, Pharma and Healthcare leading the gains. Nifty Media and Nifty Consumer Durables were the only sectoral indices to close in the red.
- Nifty and Bank Nifty will enter the October monthly derivatives expiry today, which could lead to heightened volatility and position adjustments.



INDIA KEY NEWS

Highway Infrastructure

The company has received a Letter of Acceptance (LOA) worth Rs 91.78 crore from the National Highways Authority of India (NHAI) for operations at Baiti Kala Fee Plaza in Uttar Pradesh.

Sigma Advanced Systems

Sigma has secured an order worth Rs 973 crore from a NATO customer for the manufacture and supply of Base Bleed (BB) units for 155 mm artillery ammunition. The order is scheduled to be executed over a period of 12 months.

HCL Technologies

HCL Technologies, through its step-down, wholly owned subsidiary HCL Technologies Austria GmbH, has completed the acquisition of a 100% stake in Croatia-based Robotic Process Automation d.o.o. (Robotiq.ai).

Genus Power Infrastructures

The Board of Directors has approved a share buyback worth up to Rs 148.2 crore at a price of Rs 312 per share, involving the purchase of up to 47.5 lakh equity shares.

Raymond Realty

The company's subsidiary, Ten X Realty West, has executed an investment agreement with Raymond Realty and ICICI Prudential Real Estate Development Fund. Under the agreement, the investor has agreed to invest up to Rs 210 crore in Ten X Realty West.

*Source: moneycontrol.com

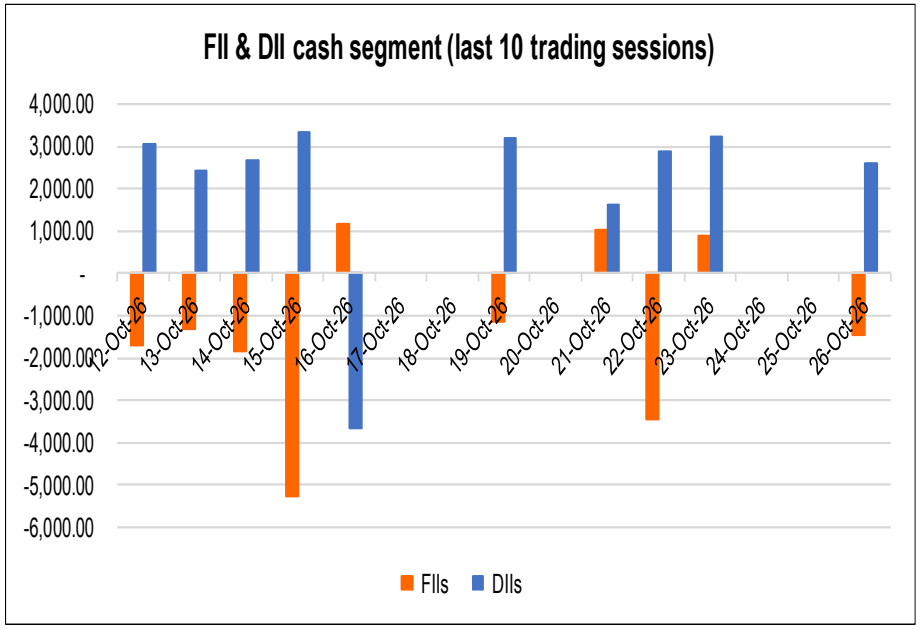
INSTITUTIONAL ACTIVITY

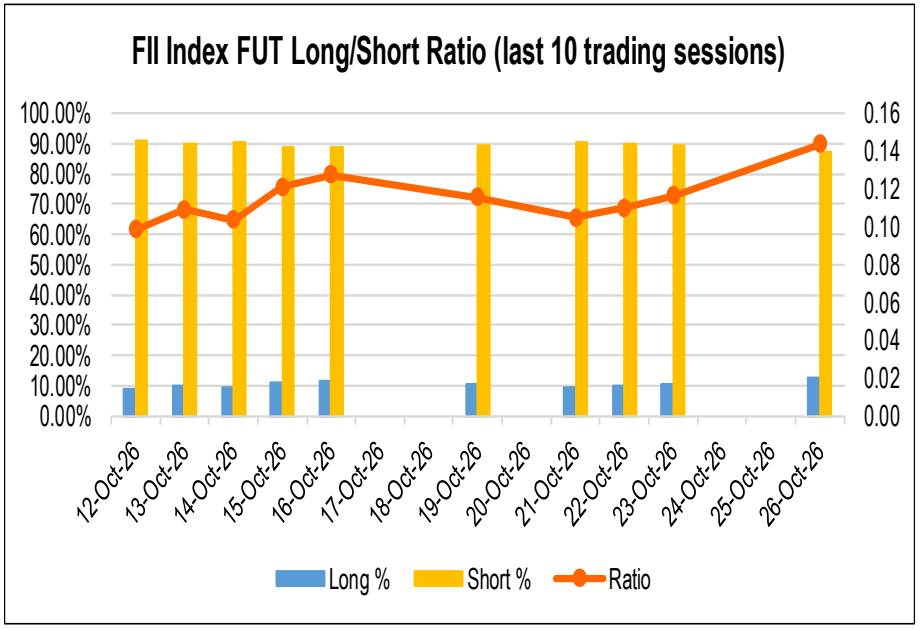
*INR in Crores

Cash Segment	26-Oct-2026	MTD	YTD
FII Net Flows	-1,462.49	-52,928.87	-4,55,996.35
DII Net Flows	2,609.57	61,719.89	7,01,254.74

*INR in Crores

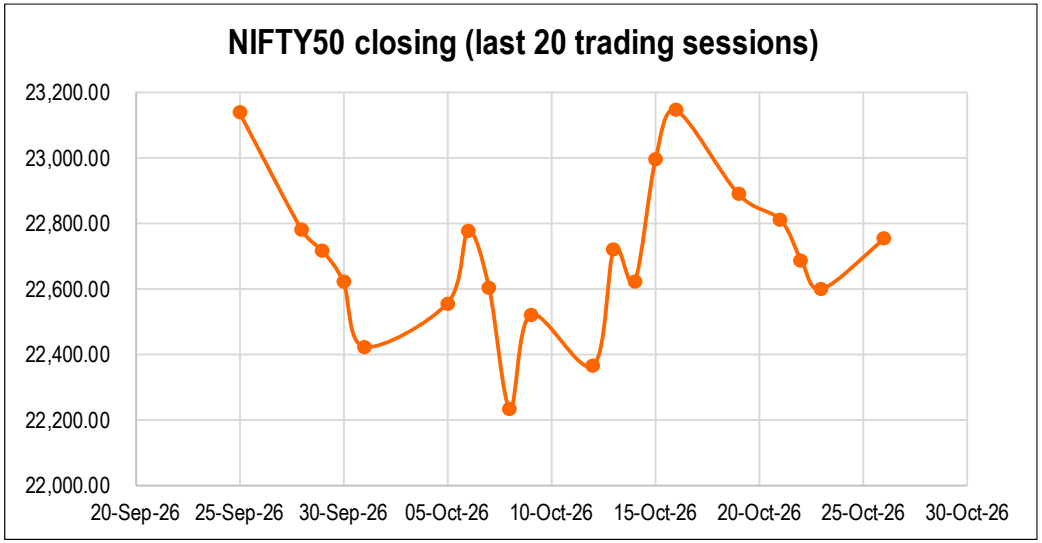
FIIs F&O Flows	26-Oct-2026	MTD
Index Futures	444.80	809.16
Index Options	-7,789.97	-50,504.93
Stock Futures	4,716.48	21,751.04
Stock Options	-1,483.55	-5,530.43



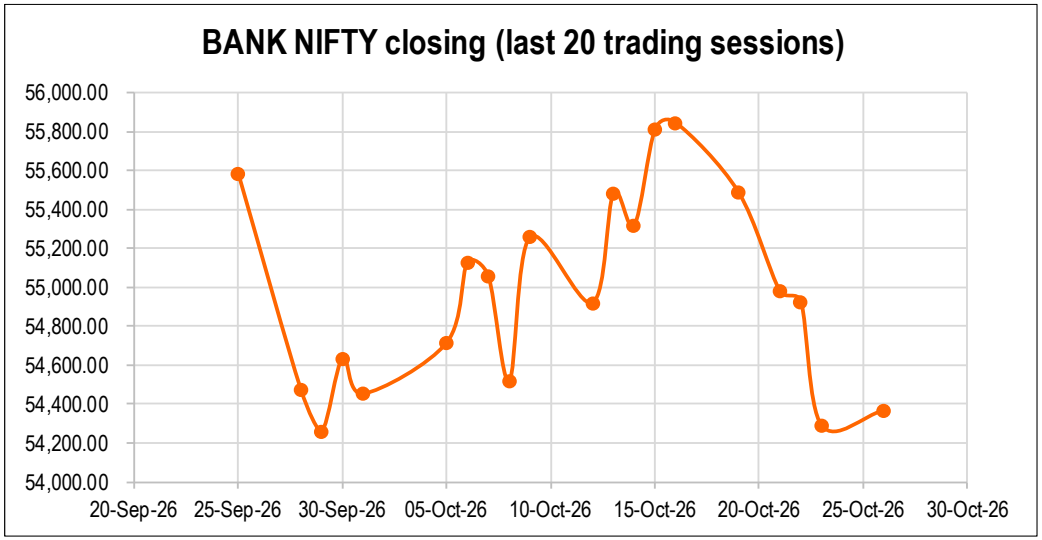


INDEX VIEW

NIFTY	
Spot	22753.20
Futures	22767.30
Highest CE OI (27th OCT)	23000
Highest PE OI (27th OCT)	22500
PCR (27th OCT)	1.12
Key Supply Zones	22800, 23150
Key Demand Zones	22400, 22150



BANK NIFTY	
Spot	54366.70
Futures	54378.00
Highest CE OI (27th OCT)	56000
Highest PE OI (27th OCT)	54000
PCR (27th OCT)	0.79
Key Supply Zones	54500, 55000
Key Demand Zones	53800, 53000



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	8,661.95	1.18%	-5.07%	-6.17%	Out-performing	Strong Under-performance	Strong Under-performance
Nifty Infrastructure	8,661.20	1.25%	-0.06%	-1.38%	Out-performing	Out-performing	Under-performing
Nifty Energy	35,022.35	1.46%	-2.65%	-4.55%	Out-performing	Strong Under-performance	Strong Under-performance
Nifty Financial Services	24,454.35	0.21%	-2.13%	-0.88%	Under-performing	Under-performing	In Line
Nifty IT	32,273.05	0.87%	2.40%	14.91%	In Line	Strong Out-performance	Strong Out-performance
Nifty Realty	789.70	0.68%	-3.23%	-7.19%	In Line	Strong Under-performance	Strong Under-performance
Nifty FMCG	42,800.75	0.28%	-2.67%	-5.44%	Under-performing	Strong Under-performance	Strong Under-performance
Nifty Pharma	25,774.25	1.76%	0.62%	-3.69%	Strong Out-performance	Out-performing	Under-performing
Nifty Healthcare	15,658.70	1.77%	0.65%	-5.31%	Strong Out-performance	Out-performing	Strong Under-performance
Nifty Oil & Gas	10,520.95	1.35%	-0.22%	-1.31%	Out-performing	In Line	Under-performing
Nifty Auto	24,970.75	0.44%	-2.42%	-5.86%	In Line	Under-performing	Strong Under-performance
Nifty Metal	11,731.55	2.21%	-2.78%	-8.74%	Strong Out-performance	Strong Under-performance	Strong Under-performance
Nifty PSU Bank	8,093.80	0.29%	-2.41%	0.84%	Under-performing	Under-performing	In Line
Nifty Private Bank	26,825.30	0.63%	-1.34%	1.32%	In Line	Under-performing	Out-performing
Nifty Bank	54,366.70	0.15%	-2.02%	-0.19%	Under-performing	Under-performing	In Line
Nifty Consumer Durables	33,851.10	-0.21%	-5.55%	-11.30%	Under-performing	Strong Under-performance	Strong Under-performance

Stocks to watch: ATHERENERG, DRREDDY, INDHOTEL, SONACOMS.

Stocks in F&O ban: AMBUJACEM, KAYNES, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2508.00	1.25	2717.73	2883.21	2598.34
ADANIPORTS	1752.50	2.92	1757.30	1733.13	1646.95
APOLLOHOSP	7844.00	1.47	7997.25	8482.51	8076.76
ASIANPAINT	2322.00	0.65	2359.95	2474.77	2530.07
AXISBANK	1220.00	0.21	1238.19	1242.57	1284.72
BAJAJ_AUTO	10071.00	-0.01	10271.20	11140.24	10274.97
BAJAJFINSV	1670.90	0.96	1723.55	1857.97	1862.83
BAJFINANCE	918.70	-1.10	959.69	1017.43	973.42
BEL	363.00	0.28	377.78	394.06	416.47
BHARTIARTL	1917.50	1.34	1823.52	1855.49	1891.53
BSE	3359.00	3.97	3268.16	3293.31	3351.56
CIPLA	1355.00	1.27	1336.70	1376.84	1367.38
COALINDIA	405.00	1.90	414.04	413.61	434.11
DRREDDY	1310.90	6.62	1225.42	1194.66	1243.59
EICHERMOT	7099.50	0.47	7115.80	7518.72	7396.33
ETERNAL	325.55	2.57	321.78	324.01	279.31
GRASIM	2950.00	1.94	2951.46	3137.40	2981.06
HCLTECH	1417.00	-0.37	1293.58	1291.62	1329.78
HDFCBANK	688.05	-0.69	710.25	715.31	795.25
HDFCLIFE	519.00	-0.91	539.34	540.37	606.21
HINDALCO	885.65	1.82	912.77	973.72	981.21
HINDUNILVR	1818.60	0.21	1863.28	1936.97	2153.75
ICICIBANK	1403.00	0.63	1353.83	1380.03	1354.54
INDIGO	4608.00	1.30	4804.98	4960.05	4802.90
INFY	1166.00	1.06	1065.39	1084.90	1224.72

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	260.50	1.01	262.41	264.93	293.40
JIOFIN	205.23	0.10	214.92	228.25	243.14
JSWSTEEL	1260.00	6.28	1222.01	1264.45	1243.48
KOTAKBANK	440.75	2.38	430.75	418.82	400.21
LT	3680.00	0.90	3693.09	3866.27	3938.74
M&M	2853.10	-0.28	2873.80	3088.26	3220.38
MARUTI	11220.00	-0.09	11476.25	12374.40	13581.05
MAXHEALTH	835.00	2.45	887.60	966.19	1017.73
NESTLEIND	1173.50	-0.13	1293.74	1372.87	1363.21
NTPC	300.00	0.67	313.39	324.91	356.50
ONGC	228.44	0.41	225.12	231.44	255.67
POWERGRID	247.00	-0.16	253.15	261.26	282.82
RELIANCE	1201.80	0.99	1191.72	1247.45	1336.24
SBILIFE	1643.70	0.23	1687.39	1723.25	1857.33
SBIN	960.80	0.23	959.74	998.19	1040.09
SHRIRAMFIN	825.00	-4.62	939.26	1012.85	1006.43
SUNPHARMA	1740.00	-0.46	1779.57	1846.25	1808.17
TATACONSUM	936.50	-2.84	964.85	1002.37	1097.65
TATASTEEL	169.94	1.35	176.64	181.96	194.09
TCS	2535.00	0.20	2245.67	2251.92	2447.15
TECHM	1795.00	0.28	1612.85	1594.03	1522.57
TITAN	4323.00	0.54	4488.35	4800.99	4439.09
TMPV	263.70	-0.34	280.32	299.47	338.97
TRENT	2754.00	0.97	2802.69	2835.33	2780.65
ULTRACEMCO	11180.00	1.18	10827.75	11103.94	11643.08

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