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DAILY TECHNICAL & DERIVATIVES REPORT

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Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,481.51	-347.11	-0.67%
S&P 500	7,683.69	-59.72	-0.77%
NASDAQ 100	30,276.81	-331.32	-1.08%
FTSE 100	10,684.88	-10.37	-0.10%
NIKKEI (8:00 AM)	65,268.00	-609.62	-0.93%
HANG SENG (8:00 AM)	24,450.00	-192.51	-0.78%
GOLD	4,168.80	0.40	0.01%
SILVER	61.13	-0.59	-0.95%
BRENT OIL	99.13	1.30	1.33%
DOLLAR INDEX	100.95	0.02	0.02%
USD/INR	96.24	0.05	0.05%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The **U.S. 10-year Treasury** yield remained elevated at 5.22% after rising 11 bps on Monday to its highest level since 2007.
- **U.S. stocks** fell as higher crude prices and Treasury yields weighed on sentiment amid uncertainty over a potential Iran peace deal and its implications for the Federal Reserve's rate outlook.
- **Asian markets** traded lower in early Tuesday trade, with Nikkei down 1% and Topix lower by 1.68%, tracking Wall Street's weakness.
- **Gold** traded around \$4,168/oz after plunging 4% on Monday to a seven-week low, as elevated yields reduced demand for non-yielding assets.
- **GIFT Nifty** trading at ~22,812.00 is indicating a cautious start for the Indian market on Tuesday.



MARKET SNAPSHOT

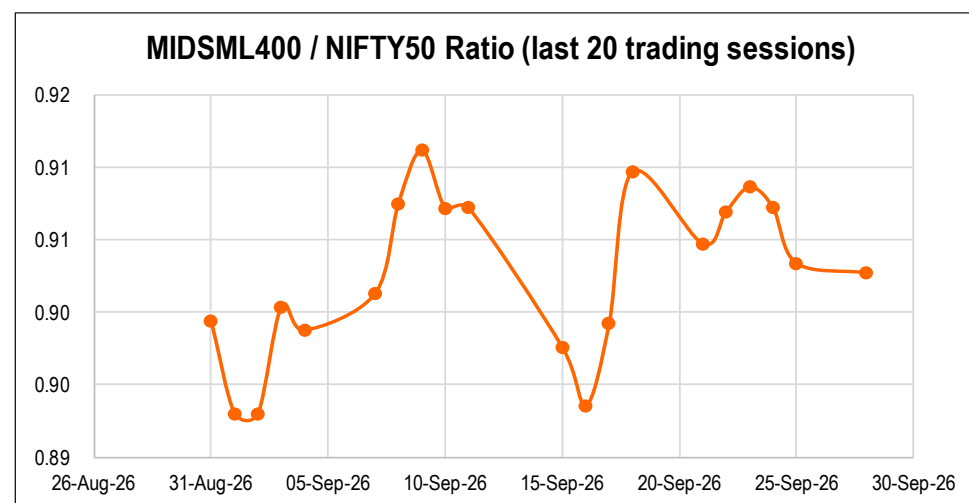
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,780.25	-360.25	-1.56%
SENSEX	72,771.72	-1,124.02	-1.52%
BANK NIFTY	54,471.65	-1,108.75	-1.99%
FIN NIFTY	24,671.65	-423.20	-1.69%
NIFTY MIDCAP 100	59,914.20	-991.80	-1.63%
NIFTY SMLCAP 100	19,351.10	-364.15	-1.85%
INDIA VIX	13.75	1.59	13.10%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	3	47	0
NIFTY 500	76	424	0
NIFTY F&O	21	189	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	6	12%
NIFTY 500	103	21%

Highlights

- Nifty witnessed its biggest intraday decline in the last 57 trading sessions on Monday, breaking below the crucial 23,000 mark amid broad-based selling pressure. The breach of this key support level keeps the near-term market setup cautious. All sectoral indices closed in the red, with the PSU Bank index declining 3.24% and facing the maximum selling pressure during the session.
- Nifty and Bank Nifty head into the September F&O monthly expiry today, which could keep volatility elevated and result in sharp intraday moves.





HCL Technologies

HCL Software, the software business division of HCLTech, has announced its intent to acquire Robotiq.ai, a Croatia-based provider of an enterprise robotic process automation platform, to strengthen its enterprise agentic automation capabilities. The acquisition is expected to close in November 2026.

ITC

ITC has completed the acquisition of a 100 percent equity stake in Sproutlife Foods for Rs 645 crore by acquiring an additional 13,445 equity shares.

Pidilite Industries

The company has entered into a strategic partnership with Hwaseung Chemical, a global leader in high-performance footwear adhesives, to introduce advanced South Korean bonding technologies to the Indian market. The collaboration will bring globally benchmarked adhesive systems to India's footwear manufacturing ecosystem.

Zydus Lifesciences

The US Food and Drug Administration (USFDA) conducted a cGMP inspection of the company's manufacturing plant at SEZ II, Ahmedabad, from September 21 to 28, 2026, and concluded the inspection with one observation. There were no data-integrity-related observations.



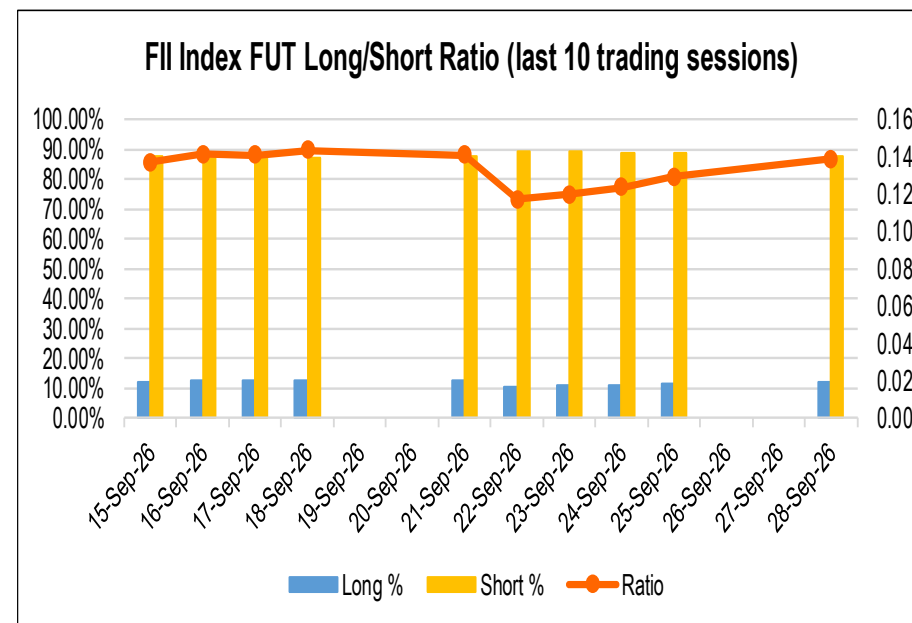
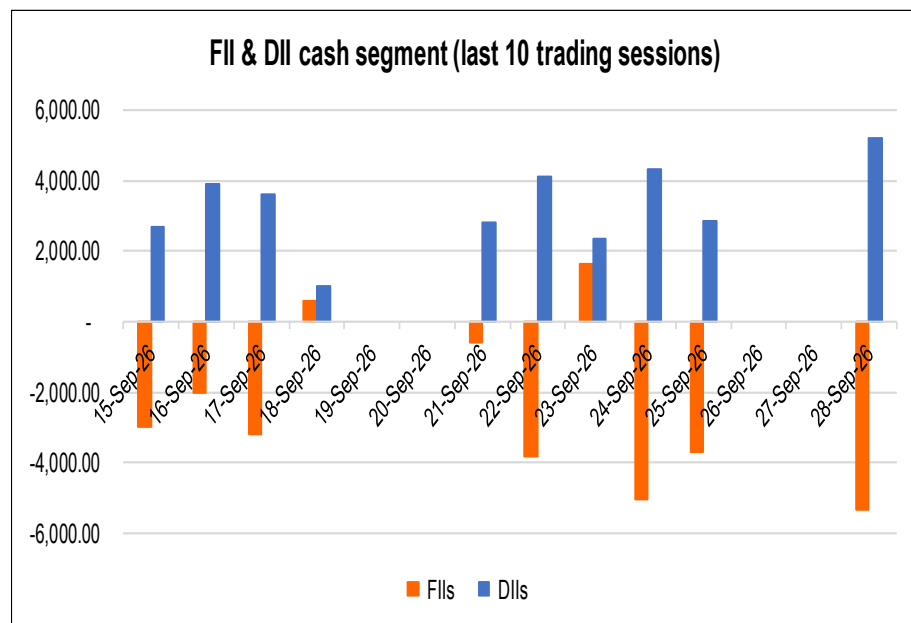
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	28-Sept-2026	MTD	YTD
FII Net Flows	-5,353.22	-23,884.19	-3,82,938.85
DII Net Flows	5,189.02	57,805.85	6,21,310.41

*INR in Crores

FII's F&O Flows	28-Sept-2026	MTD
Index Futures	-1,169.82	-17,310.69
Index Options	-2,660.21	-47,025.29
Stock Futures	1,045.07	-3,699.81
Stock Options	1,128.26	-67.12



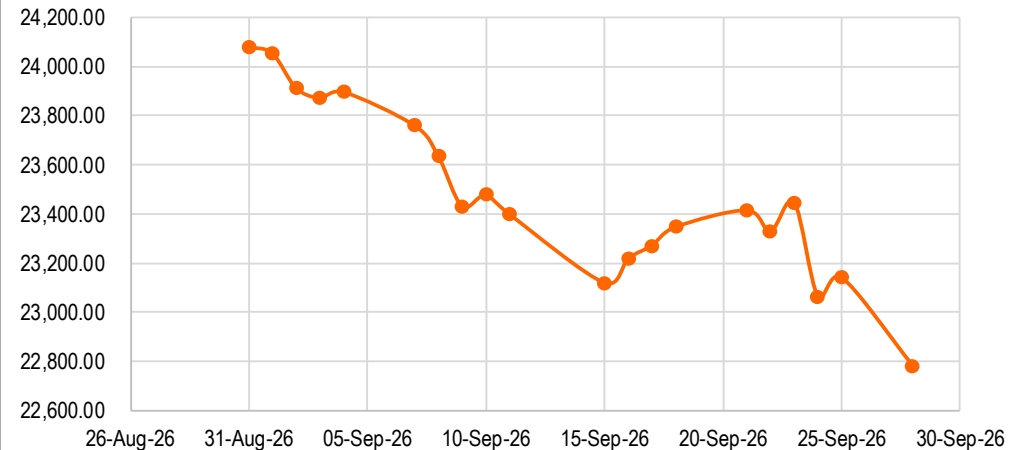


INDEX VIEW

NIFTY

Spot	22780.25
Futures	22819.60
Highest CE OI (29 th SEPT)	23000
Highest PE OI (29 th SEPT)	22000
PCR (29 th SEPT)	0.61
Key Supply Zones	23000, 23300
Key Demand Zones	22500, 22150

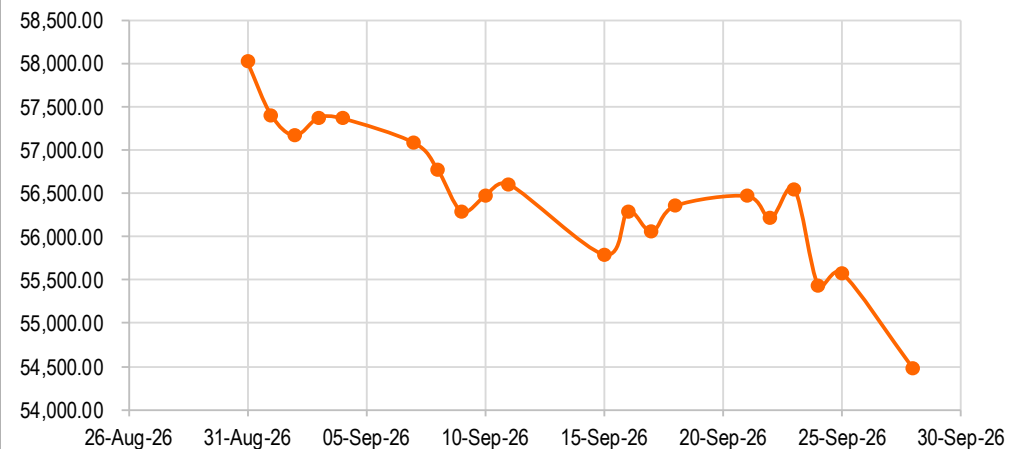
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	54471.65
Futures	54556.20
Highest CE OI (29 th SEPT)	57500
Highest PE OI (29 th SEPT)	54000
PCR (29 th SEPT)	0.69
Key Supply Zones	55000, 55700
Key Demand Zones	54000, 53000

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	9,231.20	-1.81%	-2.54%	-5.34%	Under-performance	Under-performance	Out-performance
Nifty Infrastructure	8,782.50	-1.95%	-2.64%	-4.98%	Under-performance	Under-performance	Out-performance
Nifty Energy	36,693.20	-2.00%	-2.74%	-3.45%	Under-performance	Under-performance	Out-performance
Nifty Financial Services	24,671.65	-1.69%	-2.94%	-6.14%	Under-performance	Under-performance	Under-performance
Nifty IT	28,086.50	-0.26%	-1.73%	-10.21%	Out-performance	Out-performance	Under-performance
Nifty Realty	850.90	-2.12%	-1.23%	-6.38%	Under-performance	Out-performance	Under-performance
Nifty FMCG	45,264.35	-1.47%	-0.86%	-3.31%	Out-performance	Out-performance	Out-performance
Nifty Pharma	26,761.65	-0.89%	-0.55%	-0.85%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,537.15	-0.85%	-1.09%	-1.56%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,660.60	-1.86%	-2.72%	-3.68%	Under-performance	Under-performance	Out-performance
Nifty Auto	26,525.05	-1.64%	-2.07%	-8.06%	Under-performance	Out-performance	Under-performance
Nifty Metal	12,854.40	-1.78%	-1.05%	-4.96%	Under-performance	Out-performance	Out-performance
Nifty PSU Bank	8,026.10	-3.24%	-2.96%	-6.72%	Under-performance	Under-performance	Under-performance
Nifty Private Bank	26,476.40	-1.51%	-2.97%	-4.55%	Out-performance	Under-performance	Out-performance
Nifty Bank	54,471.65	-1.99%	-3.10%	-5.26%	Under-performance	Under-performance	Out-performance
Nifty Consumer Durables	38,162.90	-0.30%	0.53%	-5.87%	Out-performance	Out-performance	Under-performance

Stocks to watch: AMBER, CROMPTON, DIXON.

Stocks in F&O ban: LICHSGFIN, SAIL.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2831.10	-2.93	2950.17	3008.62	2557.02
ADANIPTS	1743.70	-2.48	1737.27	1724.70	1623.09
APOLLOHSP	8860.00	-0.33	8829.62	8839.04	8000.74
ASIANPAINT	2420.00	-0.98	2479.64	2610.91	2569.36
AXISBANK	1209.90	-1.02	1245.44	1242.67	1285.61
BAJAJ_AUTO	11024.00	-2.28	11652.15	11574.22	10176.82
BAJAJFINSV	1752.00	-1.07	1890.60	1950.30	1892.13
BAJFINANCE	985.00	-1.19	1030.78	1064.49	977.74
BEL	385.50	-2.05	399.81	402.16	417.89
BHARTIARTL	1771.40	-0.78	1833.58	1896.87	1915.69
CIPLA	1383.70	-1.14	1386.07	1419.59	1382.85
COALINDIA	422.50	-0.84	419.62	415.68	432.03
DRREDDY	1221.00	1.67	1171.22	1174.67	1247.49
EICHERMOT	7213.50	-1.99	7581.00	7790.83	7407.49
ETERNAL	330.95	-1.21	327.14	317.83	276.19
GRASIM	3150.00	-1.28	3242.18	3231.94	2970.46
HCLTECH	1252.60	-0.43	1269.34	1299.37	1362.19
HDFCBANK	719.05	-2.25	716.20	728.14	820.85
HDFCLIFE	531.60	0.11	537.88	543.42	626.00
HINDALCO	955.90	-2.16	993.46	1004.46	976.44
HINDUNILVR	1896.00	-2.41	1950.22	2028.00	2192.95
ICICIBANK	1302.00	-1.87	1376.76	1410.10	1354.59
INDIGO	4874.50	-1.33	4956.78	5126.31	4822.96
INFY	1003.20	0.30	1066.11	1105.58	1274.44
ITC	265.20	-1.41	263.91	272.75	305.86

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	220.50	-2.86	231.34	240.84	250.53
JSWSTEEL	1264.10	-1.01	1284.67	1285.91	1233.54
KOTAKBANK	401.55	-0.61	415.47	402.91	400.14
LT	3766.40	-2.83	3914.01	3958.96	3972.31
M&M	2995.00	-1.32	3106.37	3258.40	3290.89
MARUTI	12008.00	-0.47	12469.00	13265.16	14033.96
MAXHEALTH	1000.10	-1.37	1025.10	1041.81	1035.15
NESTLEIND	1346.00	-1.22	1391.62	1448.12	1359.74
NTPC	321.10	-1.68	328.91	336.96	357.50
ONGC	230.00	-2.48	235.07	238.14	256.71
POWERGRID	261.85	-2.84	266.25	272.06	283.90
RELIANCE	1197.60	-2.32	1263.13	1287.63	1368.98
SBILIFE	1728.10	-0.80	1726.74	1788.00	1887.79
SBIN	962.00	-2.14	1000.98	1029.22	1041.10
SHRIRAMFIN	976.30	-1.79	1020.78	1063.05	1004.00
SUNPHARMA	1838.00	-0.77	1876.04	1913.87	1807.07
TATACONSUM	960.00	-2.36	1001.72	1048.21	1116.13
TATASTEEL	186.30	-0.89	185.73	186.27	193.62
TCS	2070.70	-0.54	2208.83	2286.89	2535.49
TECHM	1542.20	-0.37	1565.70	1593.21	1520.44
TITAN	4819.50	-1.32	4945.72	4953.45	4391.57
TMPV	281.75	-3.00	303.27	320.37	345.62
TRENT	2626.00	-1.62	2789.27	2895.27	2775.70
ULTRACEMCO	11025.00	-1.17	11082.75	11524.68	11717.08
WIPRO	161.56	-1.50	169.76	176.81	203.27



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Registered office Address: 1704, B Wing, Parinee Crescenzo, G Block, BKC, Bandra East, Mumbai 400051

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SEBI Stock Broker Registration No: INZ000159332

SEBI Depository Participant Registration No: IN-DP-728-2022

SEBI Merchant Banker Registration No: INM000009926

Phone: +91-22-61389300

Name of the Compliance Officer: Mr. Sameer Khobrekar

Email ID: Compliance@bobcaps.in; Phone no.: +91-22-61389358

For any queries or grievances, you may contact the Grievance Officer.

Name of the Grievance Officer: Mr. Nilesh Mehta

Email ID: head-customer@bobcaps.in; Phone no: 92288 60945

Brand Name: BOBCAPS

Website: <https://www.bobcaps.in/>

CIN: U65999MH1996GOI098009

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