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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,983.98	213.67	0.41%
S&P 500	7,541.40	-38.67	-0.51%
NASDAQ 100	27,989.82	-395.03	-1.39%
FTSE 100	10,761.33	31.55	0.29%
NIKKIE (8:00 AM)	63,081.86	-208.25	-0.33%
HANG SENG (8:00 AM)	23,493.50	100.18	0.43%
GOLD	3,954.85	-14.75	-0.37%
SILVER	50.21	-0.68	-1.34%
BRENT OIL	104.82	0.57	0.55%
DOLLAR INDEX	101.73	0.08	0.07%
USD/INR	94.84	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **The S&P 500** closed lower on Monday as oil prices plunged on optimism over a potential U.S.-Iran peace agreement. **Asian markets** opened lower on Tuesday, as weakness in U.S. chipmakers and concerns over AI-related valuations overshadowed the sharp decline in crude oil prices.
- Oil prices stabilized, earlier on Tuesday after recording their steepest decline in over three months on the previous day. **Brent Crude** prices plunged by 7.31% on Monday, hitting a low at 102.31.
- **The U.S. 10-year Treasury yield** remained largely unchanged at 4.914%.
- **GIFT Nifty** trading at ~23,527.00 is indicating a positive start for the Indian market on Tuesday.

MARKET SNAPSHOT

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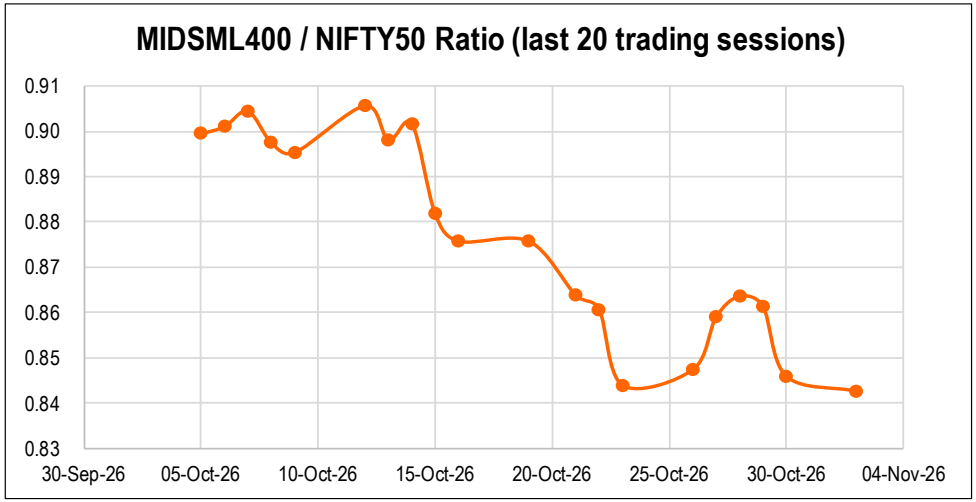
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,440.80	387.70	1.68%
SENSEX	75,692.78	1,233.25	1.66%
BANK NIFTY	55,002.20	315.25	0.58%
FIN NIFTY	24,899.05	186.85	0.76%
NIFTY MIDCAP 100	57,983.40	682.15	1.19%
NIFTY SMLCAP 100	18,594.00	130.40	0.71%
INDIA VIX	15.47	0.17	1.11%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	38	12	0
NIFTY 500	404	94	2
NIFTY F&O	177	39	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	24	48%
NIFTY 500	120	24%

Highlights

- Nifty rallied nearly 400 points on Monday, with a gap-up opening followed by sustained upward momentum throughout the session, indicating a significant improvement in market sentiment.
- The rally was largely driven by RELIANCE, which surged 11.60% following its Q2 results, emerging as a key contributor to the benchmark's strong performance.
- A notable shift in FII activity has also been observed over the past couple of weeks. FIIs recorded net buying of ₹6,721.98 crore in the cash segment over the last 10 trading sessions, suggesting a gradual improvement in foreign investor sentiment towards Indian equities.



Lupin

The pharmaceutical company has received approval from the United States Food and Drug Administration (USFDA) for its abbreviated new drug application (ANDA) for Amifampridine Tablets, 10 mg. The tablets are bioequivalent to the reference listed drug (RLD), Firdapse Tablets, of Catalyst Pharmaceuticals, Inc. Lupin is one of the first ANDA applicants and is eligible for 180 days of shared generic exclusivity.

Samvardhana Motherson International

The Motherson Group has announced a collaboration with Nanyang Technological University, Singapore (NTU Singapore), to advance Spinheat, a magnetic induction technology capable of curing industrial coatings within minutes while consuming significantly less energy than conventional oven-based methods. The collaboration aims to industrialise the technology for real-world applications, including the curing of resin coatings on automotive and aerospace components.

*Source: moneycontrol.com

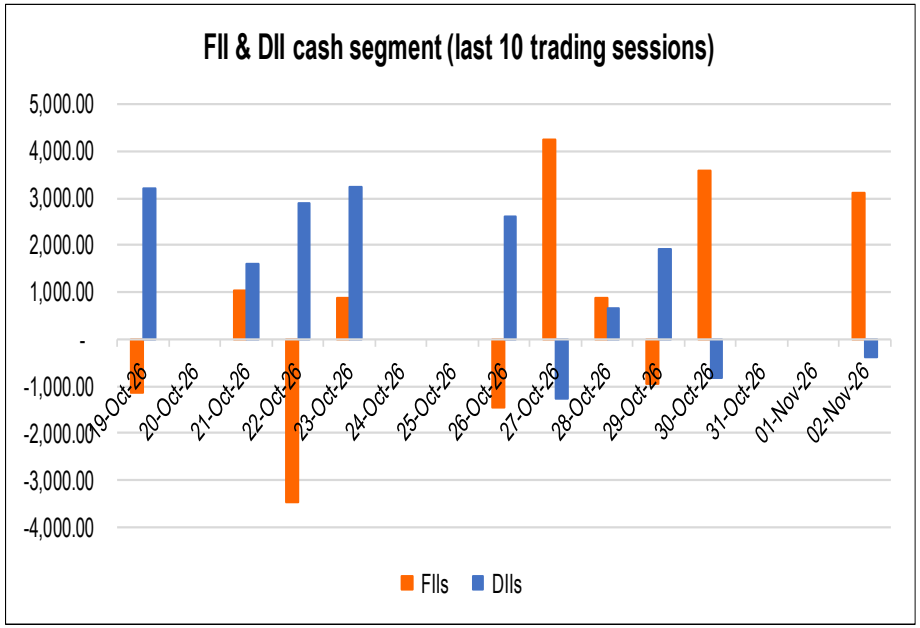
INSTITUTIONAL ACTIVITY

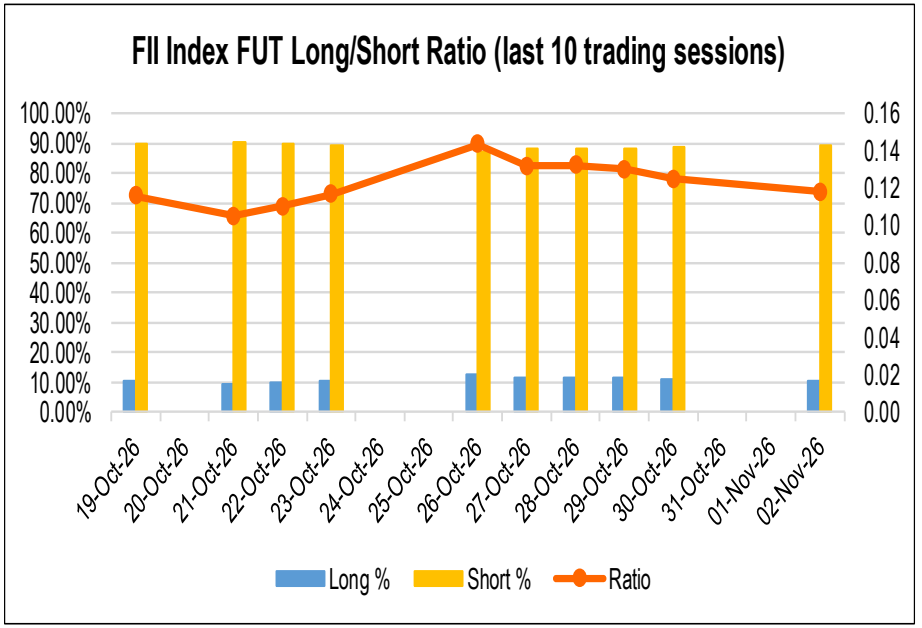
*INR in Crores

Cash Segment	2-Nov-2026	MTD	YTD
FII Net Flows	3,114.68	3,114.68	-4,45,114.51
DII Net Flows	-392.20	-392.20	7,01,362.76

*INR in Crores

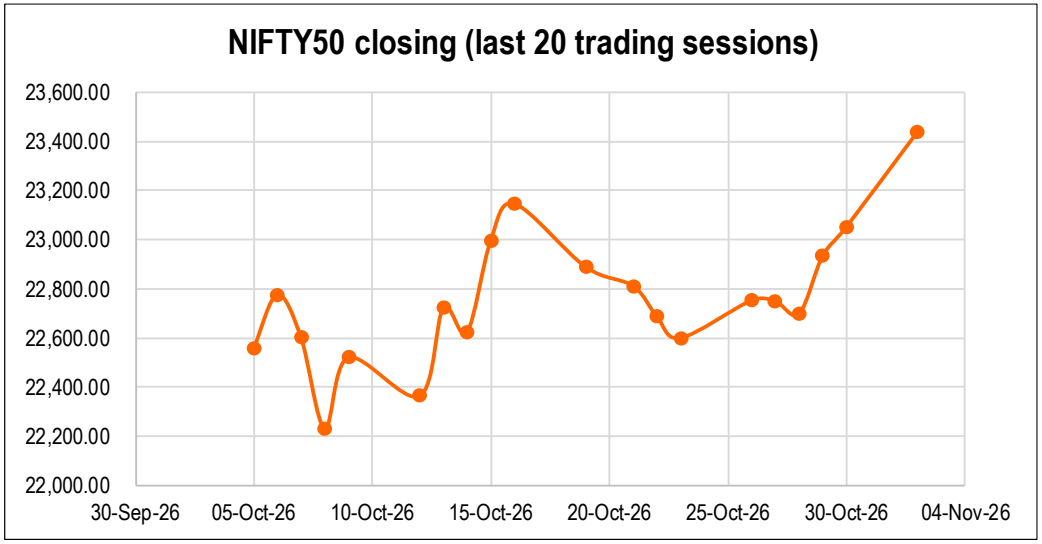
FIIs F&O Flows	2-Nov-2026	MTD
Index Futures	1,113.16	1,113.16
Index Options	10,513.20	10,513.20
Stock Futures	3,771.17	3,771.17
Stock Options	399.11	399.11



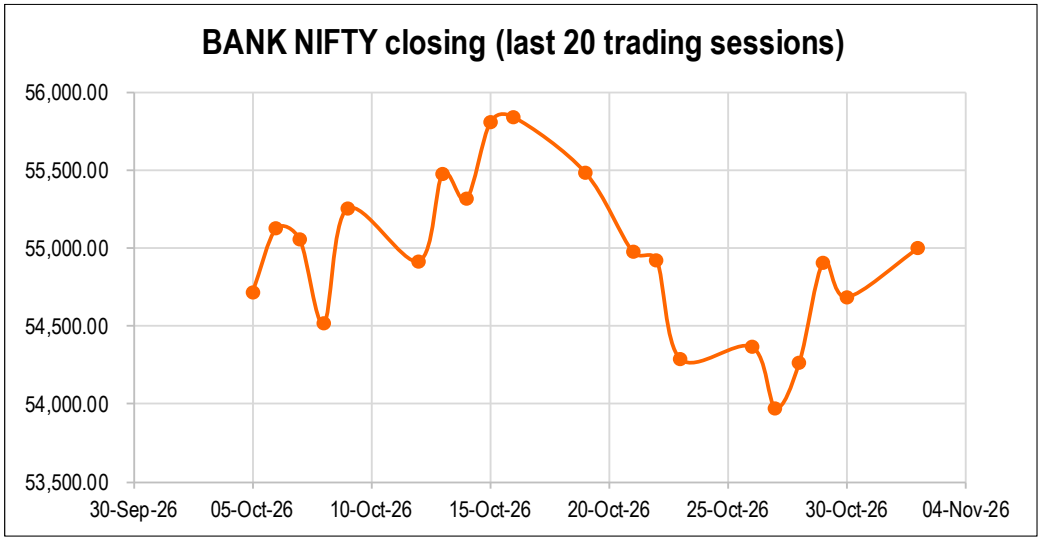


INDEX VIEW

NIFTY	
Spot	23440.80
Futures	23407.40
Highest CE OI (23rd NOV)	23500
Highest PE OI (23rd NOV)	23000
PCR (23rd NOV)	1.27
Key Supply Zones	23600, 24000
Key Demand Zones	23000, 22800



BANK NIFTY	
Spot	55002.20
Futures	55119.80
Highest CE OI (23rd NOV)	57000
Highest PE OI (23rd NOV)	58000
PCR (23rd NOV)	0.95
Key Supply Zones	55150, 56000
Key Demand Zones	54600, 54000



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	8,826.65	1.40%	0.08%	-3.46%	Under-performing	Strong Under-performance	Strong Under-performance
Nifty Infrastructure	9,124.95	3.70%	4.56%	6.04%	Strong Out-performance	Out-performing	Out-performing
Nifty Energy	36,329.85	3.92%	3.03%	-0.16%	Strong Out-performance	In Line	Strong Under-performance
Nifty Financial Services	24,899.05	0.76%	2.45%	1.40%	Under-performing	Under-performing	Under-performing
Nifty IT	32,442.50	-0.50%	0.79%	14.62%	Strong Under-performance	Strong Under-performance	Strong Out-performance
Nifty Realty	822.25	1.03%	2.14%	-1.53%	Under-performing	Under-performing	Strong Under-performance
Nifty FMCG	43,974.65	0.84%	1.99%	0.42%	Under-performing	Under-performing	Strong Under-performance
Nifty Pharma	27,105.00	-0.07%	3.19%	3.02%	Strong Under-performance	In Line	Under-performing
Nifty Healthcare	16,479.15	0.18%	3.53%	2.38%	Strong Under-performance	In Line	Under-performing
Nifty Oil & Gas	10,916.30	5.95%	3.61%	4.21%	Strong Out-performance	Out-performing	In Line
Nifty Auto	25,761.00	1.33%	1.66%	1.48%	Under-performing	Under-performing	Under-performing
Nifty Metal	12,162.70	3.21%	3.02%	-2.39%	Strong Out-performance	In Line	Strong Under-performance
Nifty PSU Bank	8,346.95	1.36%	2.71%	5.15%	Under-performing	In Line	In Line
Nifty Private Bank	27,015.90	-0.14%	1.46%	1.19%	Strong Under-performance	Under-performing	Under-performing
Nifty Bank	55,002.20	0.58%	1.90%	1.01%	Strong Under-performance	Under-performing	Under-performing
Nifty Consumer Durables	35,457.40	2.70%	3.51%	-1.31%	Strong Out-performance	In Line	Strong Under-performance

Stocks to watch: COALINDIA, RELIANCE, TATAPOWER, ULTRACEMCO.

Stocks in F&O ban: KAYNES, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2615.40	1.40	2634.32	2838.66	2605.67
ADANIPORTS	1854.00	0.22	1767.40	1746.70	1655.48
APOLLOHOSP	8459.00	0.13	7913.67	8424.96	8100.08
ASIANPAINT	2344.30	1.05	2331.92	2437.36	2517.56
AXISBANK	1209.00	-0.66	1237.65	1241.22	1282.96
BAJAJ_AUTO	10339.00	-0.11	10166.80	11013.66	10293.65
BAJAJFINSV	1691.50	1.43	1704.93	1823.87	1853.80
BAJFINANCE	959.40	2.16	949.85	1001.93	972.32
BEL	376.50	1.78	373.25	389.92	415.40
BHARTIARTL	1989.90	0.82	1875.34	1857.61	1888.50
BSE	3490.00	-0.58	3358.24	3303.04	3371.28
CIPLA	1387.00	0.59	1336.04	1369.76	1364.13
COALINDIA	408.00	4.88	407.10	412.56	433.31
DRREDDY	1342.00	-0.74	1253.99	1209.41	1245.96
EICHERMOT	7213.00	-0.10	7131.47	7436.93	7389.64
ETERNAL	344.00	0.10	324.52	325.85	280.67
GRASIM	3057.10	2.54	2916.82	3106.75	2983.93
HCLTECH	1434.00	0.41	1337.62	1299.79	1324.42
HDFCBANK	700.00	1.04	701.96	711.66	788.27
HDFCLIFE	522.25	-0.50	536.85	538.38	600.05
HINDALCO	911.40	3.02	897.55	958.94	980.33
HINDUNILVR	1898.30	1.81	1855.14	1916.47	2140.31
ICICIBANK	1387.40	-0.76	1372.99	1377.69	1354.22
INDIGO	4919.90	0.87	4762.91	4907.86	4796.35
INFY	1161.00	-2.03	1101.93	1086.10	1213.06

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	266.40	0.30	262.34	263.92	291.36
JIOFIN	213.25	4.28	212.05	224.12	240.84
JSWSTEEL	1309.90	5.13	1222.28	1263.03	1245.56
KOTAKBANK	458.35	-0.70	441.47	424.96	400.70
LT	3939.90	1.76	3706.59	3842.17	3931.12
M&M	2868.80	1.00	2850.78	3033.14	3197.76
MARUTI	11672.00	2.41	11387.30	12147.28	13444.27
MAXHEALTH	884.75	2.88	858.87	951.30	1013.05
NESTLEIND	1195.00	2.40	1255.09	1342.78	1360.02
NTPC	323.00	2.13	310.70	322.12	355.54
ONGC	234.83	4.19	224.96	230.41	255.41
POWERGRID	267.70	1.02	252.55	260.57	282.63
RELIANCE	1300.00	11.60	1193.03	1235.66	1327.91
SBILIFE	1660.50	0.11	1669.77	1709.55	1846.72
SBIN	987.00	2.61	959.70	988.37	1039.06
SHRIRAMFIN	863.35	4.88	904.97	984.71	1002.32
SUNPHARMA	1770.00	-0.43	1761.80	1832.21	1808.46
TATACONSUM	1028.90	0.29	977.78	996.44	1093.17
TATASTEEL	177.37	5.83	173.17	180.59	193.77
TCS	2501.70	-0.04	2352.10	2268.34	2428.24
TECHM	1786.90	-0.22	1676.73	1611.46	1527.17
TITAN	4476.30	0.90	4416.82	4735.90	4445.52
TMPV	272.40	2.64	275.95	292.87	336.44
TRENT	3046.40	0.96	2879.09	2832.35	2784.16
ULTRACEMCO	11387.00	3.10	10887.05	11062.06	11620.19

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