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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,061.95	295.07	0.56%
S&P 500	7,666.60	35.13	0.46%
NASDAQ 100	29,143.33	66.11	0.23%
FTSE 100	10,756.45	-32.83	-0.30%
NIKKIE (8:00 AM)	64,476.00	150.36	0.23%
HANG SENG (8:00 AM)	25,374.00	62.79	0.25%
GOLD	4,460.31	45.71	1.04%
SILVER	66.34	0.88	1.34%
BRENT OIL	95.58	-0.05	-0.05%
DOLLAR INDEX	99.47	-0.09	-0.09%
USD/INR	94.36	-0.61	-0.64%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** advanced on Wednesday, partially rebounding from a three-day losing streak as investors sought opportunities in stocks and sectors that appeared oversold.
- **Asian markets** also gained, while oil prices snapped a three-day rally after President Donald Trump downplayed the prospect of a prolonged conflict with Iran.
- **The USD/INR** fell to around 94.80, offering some relief to Indian equities, particularly IT stocks, while easing crude prices could support broader market sentiment.
- **GIFT Nifty** trading at ~24,087.00 is indicating a positive bias for the Indian market on Thursday.

MARKET SNAPSHOT

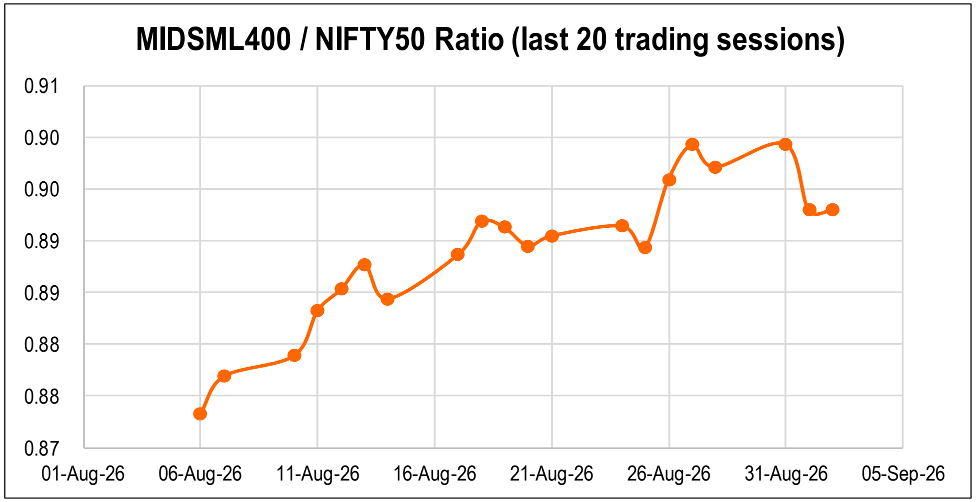
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,914.45	-141.35	-0.59%
SENSEX	76,570.35	-373.93	-0.49%
BANK NIFTY	57,172.00	-237.60	-0.41%
FIN NIFTY	25,813.05	-190.85	-0.73%
NIFTY MIDCAP 100	63,001.60	-332.90	-0.53%
NIFTY SMLCAP 100	19,812.25	-74.00	-0.37%
INDIA VIX	11.55	0.06	0.50%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	14	36	0
NIFTY 500	171	324	4
NIFTY F&O	76	132	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	15	30%
NIFTY 500	199	40%

Highlights

- Nifty remained range-bound after a gap-down opening, with 23,800 acting as an immediate support while 24,000 emerged as a key resistance.
- The failure to reclaim 24,000 suggests that buyers continue to lack strong conviction at higher levels.
- Auto stocks faced initial selling pressure, but the second-half rebound indicates buying interest at lower levels.
- A sustained move above 24,000 would be required to strengthen the short-term recovery in Nifty.



Power Grid Corporation of India

The company has received a Letter of Intent (LoI) for an inter-state transmission system project for the evacuation of power from Rajasthan REZ Phase-IV on a build, own, operate and transfer (BOOT) basis, at quoted annual transmission charges of Rs 3,244.33 crore. The project comprises the establishment of 6,000 MW ±800 kV HVDC terminals at Barmer-II in Rajasthan and South Kalamb substation in Maharashtra, along with the augmentation of the South Kalamb substation.

Housing & Urban Development Corporation

Housing & Urban Development Corporation (HUDCO) has signed a Memorandum of Understanding (MoU) with the Government of Bihar to provide financial assistance of up to Rs 25,000 crore over a period of five years for the development of industrial infrastructure, including land acquisition for projects.

ICICI Prudential Life Insurance Company

ICICI Bank, through multiple tranches executed between July 22 and September 2, 2026, has completed the purchase of 2.9 crore equity shares, representing approximately 2 percent of ICICI Prudential Life Insurance's equity share capital, for around Rs 1,470 crore. Following the acquisition, the bank's shareholding in ICICI Prudential Life Insurance stands at approximately 52.8 percent.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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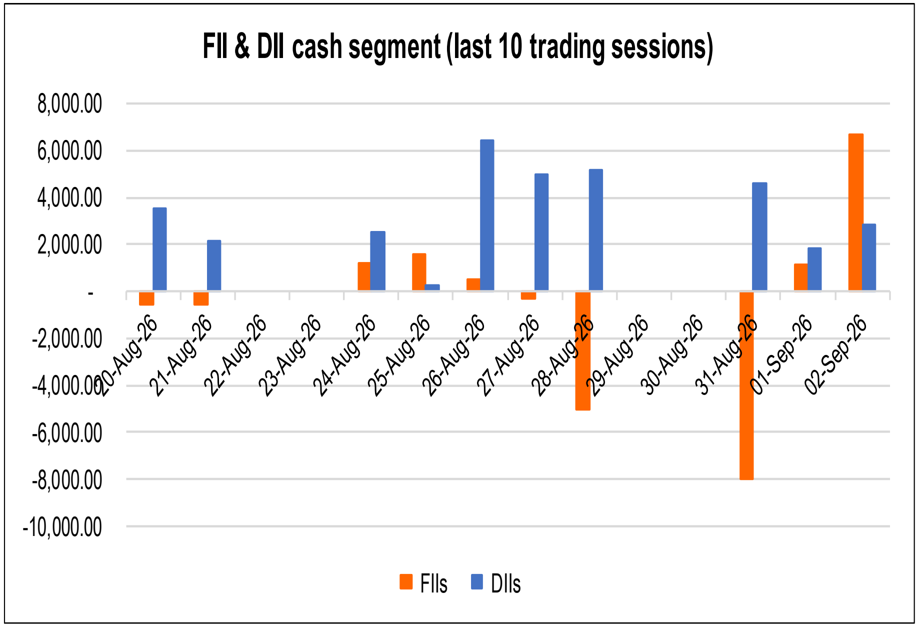
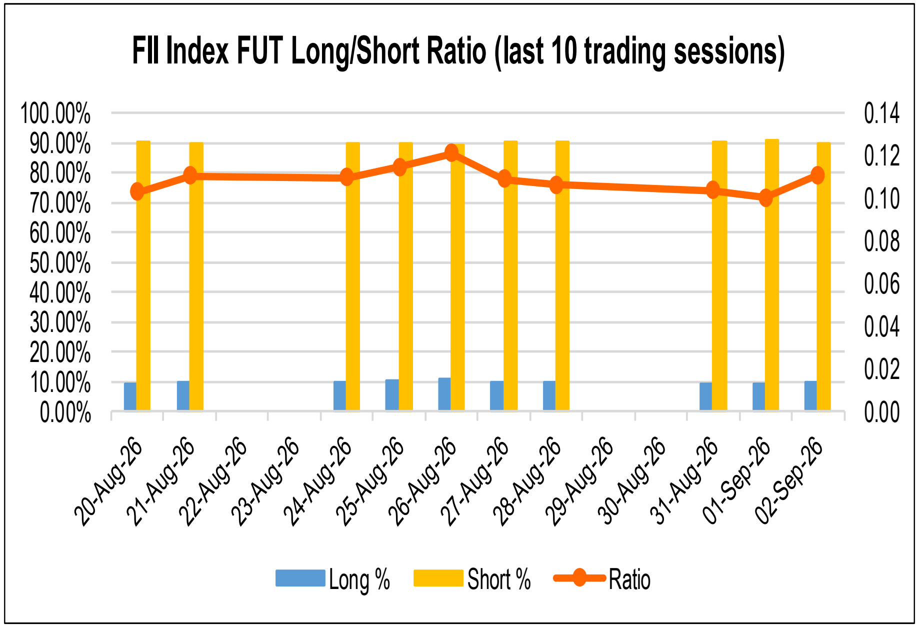
*INR in Crores

Cash Segment	2-Sept-2026	MTD	YTD
FII Net Flows	6,688.37	7,831.75	-3,51,222.91
DII Net Flows	2,812.98	4,659.92	5,68,164.48

*INR in Crores

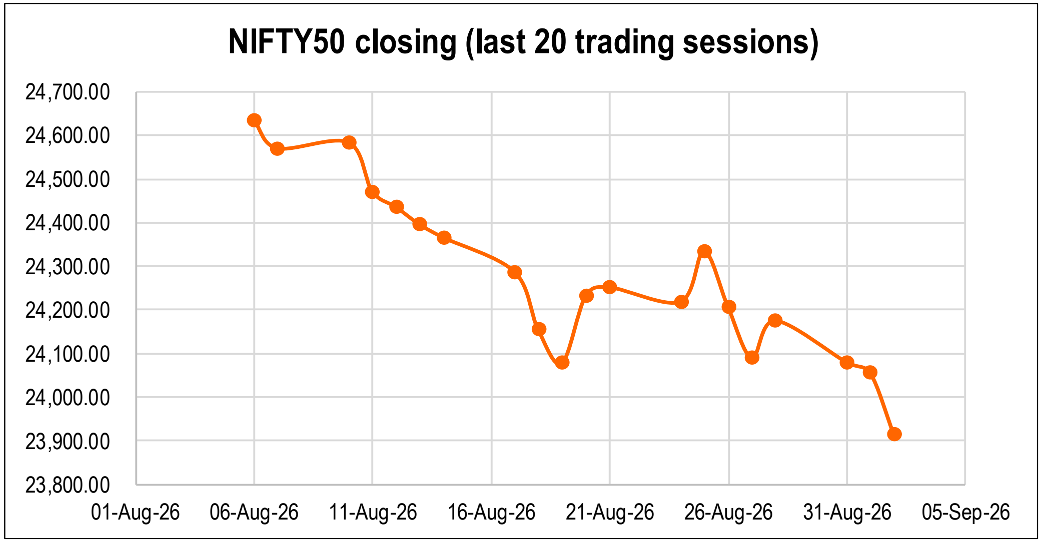
FIIs F&O Flows	2-Sept-2026	MTD
Index Futures	-1,117.23	-3,144.90
Index Options	-13,851.98	-38,762.82
Stock Futures	2,604.13	1,278.79
Stock Options	-537.28	-578.91



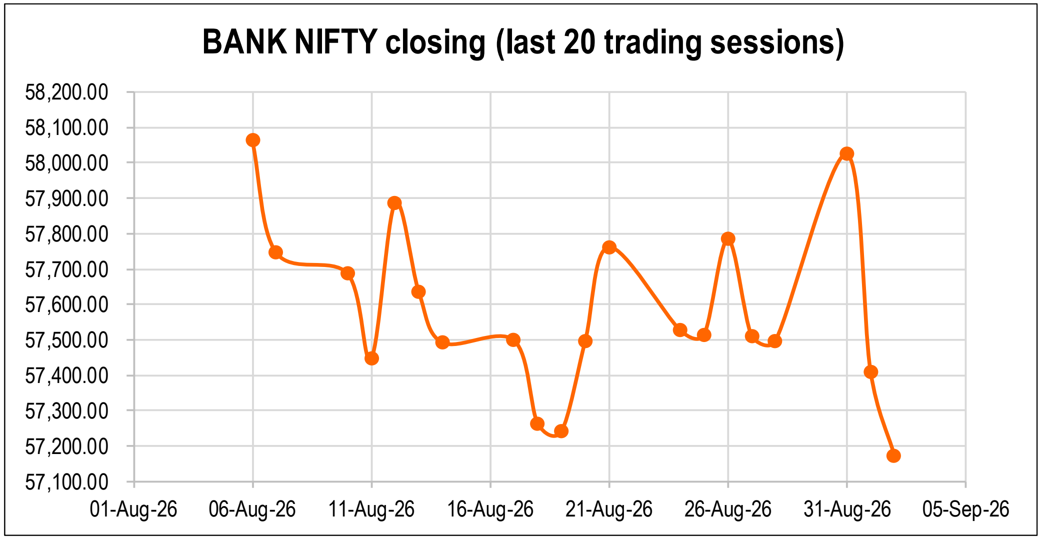


INDEX VIEW

NIFTY	
Spot	23914.45
Futures	24000.30
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.15
Key Supply Zones	24000, 24350
Key Demand Zones	23650, 23000



BANK NIFTY	
Spot	57172.00
Futures	57494.40
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	1.05
Key Supply Zones	57200, 57800
Key Demand Zones	57000, 56000



KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2891.80	0.97	3010.11	3062.25	2504.14
ADANIPORTS	1672.70	1.53	1680.66	1748.95	1601.59
APOLLOHOSP	8719.00	-0.41	8794.43	8818.78	7873.87
ASIANPAINT	2527.50	-1.86	2664.13	2686.88	2606.65
AXISBANK	1253.90	-0.33	1245.06	1275.42	1287.99
BAJAJ_AUTO	12130.00	-1.87	11792.35	11059.56	9959.84
BAJAJFINSV	1990.00	0.91	2014.52	1941.21	1908.65
BAJFINANCE	1055.90	0.19	1086.16	1060.99	977.04
BEL	405.75	-1.33	408.89	407.17	419.35
BHARTIARTL	1862.80	-0.77	1922.61	1919.59	1940.51
CIPLA	1412.80	-0.72	1437.46	1441.18	1394.75
COALINDIA	417.85	4.05	407.05	419.58	428.40
DRREDDY	1156.50	-1.24	1180.53	1219.87	1254.27
EICHERMOT	7711.50	-3.24	8011.00	7741.39	7365.94
ETERNAL	327.30	-0.14	322.23	301.79	274.06
GRASIM	3294.90	-0.31	3293.14	3202.40	2929.12
HCLTECH	1331.50	-1.47	1330.39	1258.53	1393.48
HDFCBANK	700.80	-1.56	723.35	759.33	844.69
HDFCLIFE	533.00	-1.35	542.45	554.32	645.50
HINDALCO	1009.70	-0.46	1040.09	994.77	960.48
HINDUNILVR	1975.00	-0.99	2037.26	2099.31	2231.30
ICICIBANK	1426.50	-0.80	1425.43	1422.07	1355.82
INDIGO	5020.00	-0.63	5224.50	5251.76	4893.92
INFY	1140.00	-1.38	1146.92	1106.95	1316.68
ITC	266.30	-0.11	272.62	279.78	317.77

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	236.90	0.45	246.57	243.61	256.96
JSWSTEEL	1306.00	-0.57	1300.97	1269.43	1222.93
KOTAKBANK	423.50	-0.35	402.57	394.00	400.79
LT	3981.00	0.02	4053.76	3989.34	3983.21
M&M	3190.00	-2.12	3392.97	3274.46	3343.90
MARUTI	12849.00	-0.78	13665.65	13794.66	14340.22
MAXHEALTH	994.00	-0.90	1018.37	1071.35	1044.16
NESTLEIND	1425.00	-0.92	1480.43	1466.29	1349.92
NTPC	330.00	0.76	336.90	344.50	357.26
ONGC	237.50	0.44	236.75	240.49	257.61
POWERGRID	266.80	0.85	267.54	278.29	284.40
RELIANCE	1313.10	0.31	1311.91	1303.25	1393.09
SBILIFE	1719.90	-1.12	1789.46	1815.40	1911.27
SBIN	1020.90	-1.31	1057.84	1042.95	1039.11
SHRIRAMFIN	1047.00	-1.14	1113.44	1072.63	988.89
SUNPHARMA	1931.70	0.14	1923.11	1928.23	1800.69
TATACONSUM	1012.00	-1.80	1061.56	1083.98	1130.56
TATASTEEL	183.85	-0.12	185.94	187.01	192.23
TCS	2348.00	-0.89	2341.10	2262.65	2617.48
TECHM	1623.00	-0.92	1614.23	1558.02	1515.29
TITAN	5074.00	0.48	5077.69	4809.10	4302.16
TMPV	312.75	0.89	326.77	333.79	350.91
TRENT	2852.30	-0.09	2946.30	2997.20	2783.03
ULTRACEMCO	11393.00	-0.06	11664.95	11706.40	11773.55
WIPRO	177.09	-2.54	181.77	179.12	210.14

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