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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	48,861.81	-280.12	-0.57%
S&P 500	7,135.95	-2.85	-0.04%
NASDAQ 100	27,186.99	157.97	0.58%
FTSE 100	10,213.11	-119.68	-1.16%
NIKIE (8:00 AM)	59,018.00	-899.46	-1.50%
HANG SENG (8:00 AM)	25,758.50	-353.34	-1.35%
GOLD	4,580.66	19.16	0.42%
SILVER	73.00	0.91	1.27%
BRENT OIL	112.06	1.62	1.47%
DOLLAR INDEX	98.86	0.03	0.03%
USD/INR	94.85	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

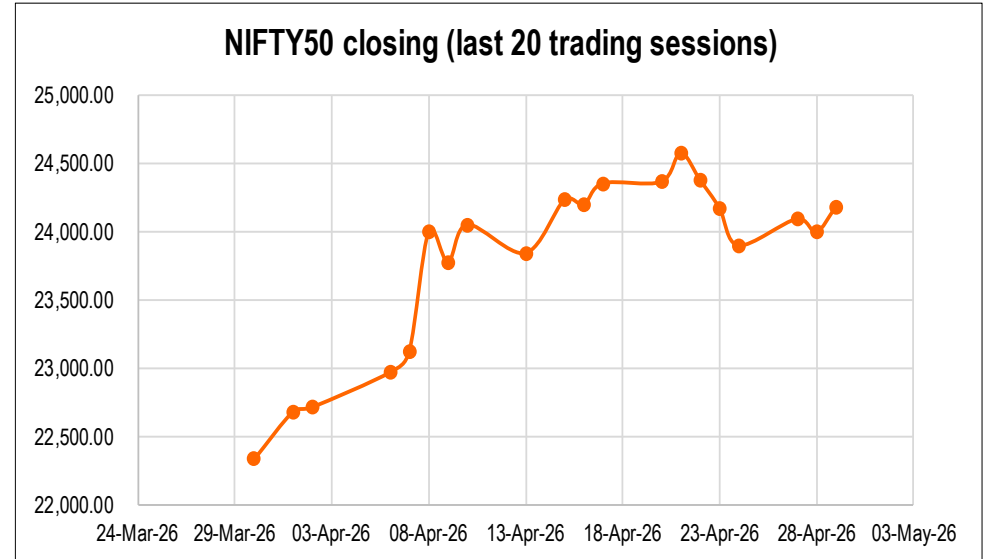
Global updates

- **U.S. markets** remained volatile, balancing the impact of elevated crude, policy cues, and key earnings announcements.
- **Asian markets** traded lower in early Thursday deals, tracking overnight weakness on Wall Street as rising oil prices and a Federal Reserve pause on interest rates weighed on sentiment.
- **Oil prices** extended their rally amid a U.S. blockade of Iran ports and stalled negotiations, keeping supplies from the Middle East constrained.
- **GIFT Nifty** trading at ~24,165.00 is indicating a negative opening for the Indian market on Thursday.

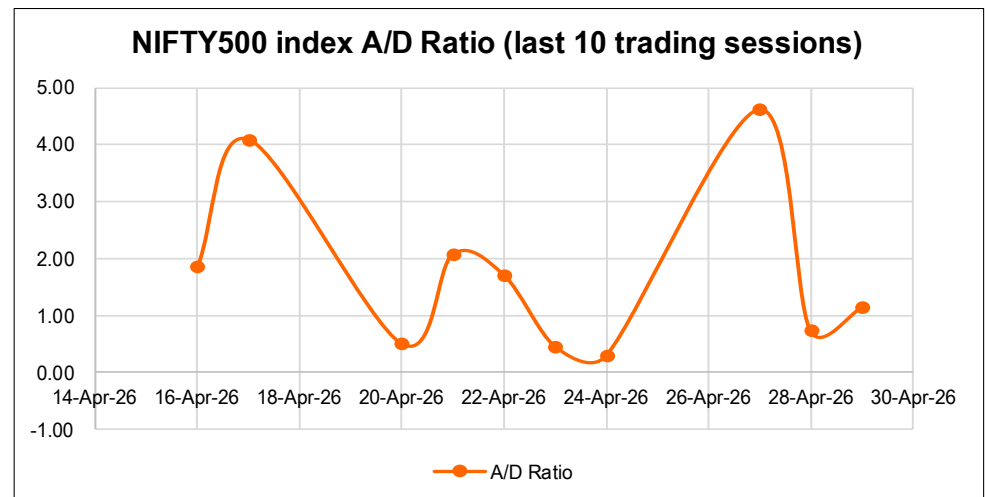


MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,177.65	181.95	0.76%
SENSEX	77,496.36	609.45	0.79%
BANK NIFTY	55,403.60	3.25	0.01%
FIN NIFTY	25,913.95	-23.55	-0.09%
MIDCAP NIFTY	13,932.70	-43.45	-0.31%
NIFTY SMLCAP 250	16,804.40	82.55	0.49%
INDIA VIX	17.35	-0.70	-3.88%



INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	35	15	0
NIFTY 500	266	233	5
NIFTY F&O	116	93	0



INDEX	SCRIPTS TRADING ABOVE 20 DSMA
NIFTY 50	37
NIFTY 500	412



Larsen & Toubro

The company has executed a Share Purchase Agreement with Hyderabad Metro Rail, a Government of Telangana enterprise, for the disposal of its entire shareholding in its subsidiary, L&T Metro Rail (Hyderabad) Limited, for Rs 1,461.47 crore.

Brigade Enterprises

Brigade Group has announced a strategic partnership with Bain Capital to develop a 2 million sq ft premium mixed-use project in Whitefield, Bengaluru. The project will be developed through a 50:50 joint venture between the two partners, with a total project investment of approximately Rs 2,200 crore. It will be built on an approximately 11-acre land parcel.

Federal Bank

The board has approved the appointment of Manikandan M as Chief Financial Officer and Key Managerial Personnel of the bank, effective May 1. He is currently working as Deputy Vice President-II and Head – Financial.



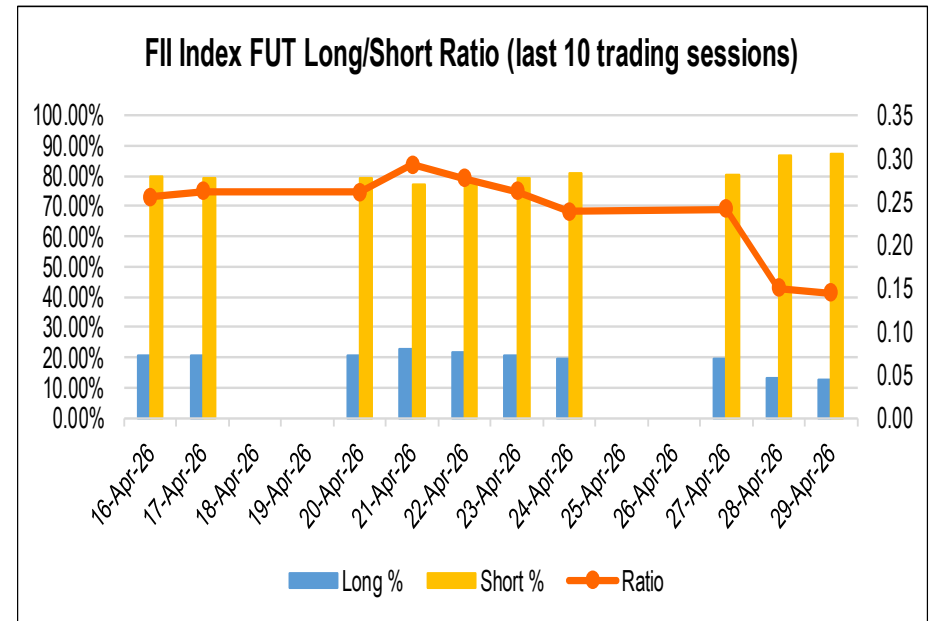
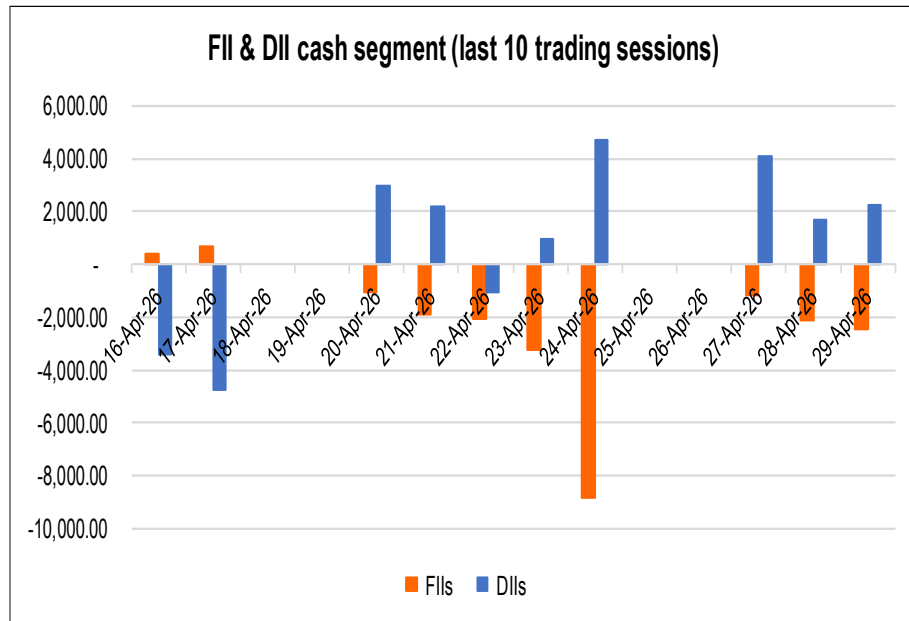
INSTITUTIONAL ACTIVITY

*INR in Crores

Cash Segment	29-4-2026	MTD	YTD
FII Net Flows	-2,468.42	-62,087.60	-2,32,704.01
DII Net Flows	2,262.17	47,576.77	2,98,180.99

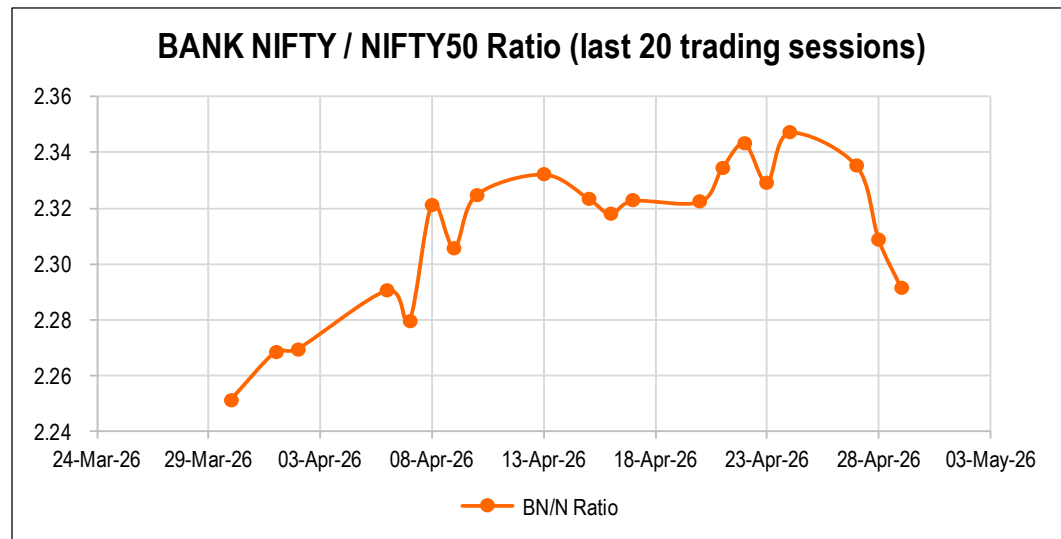
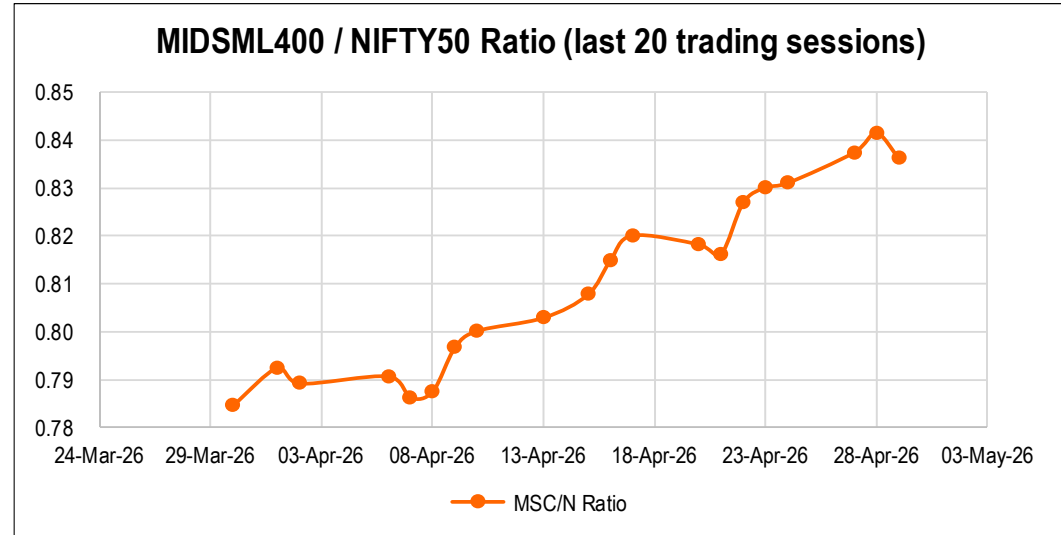
*INR in Crores

FII's F&O Flows	29-4-2026	MTD
Index Futures	-68.88	5,974.51
Index Options	-3,879.06	-94,718.79
Stock Futures	340.77	-5,150.41
Stock Options	-307.00	-7,807.31



NIFTY	
Spot	24177.65
Futures	24252.00
Highest CE OI (26 th MAY)	25000
Highest PE OI (26 th MAY)	24000
PCR (26 th MAY)	1.13
Key Supply Zones	24350, 24600
Key Demand Zones	23800, 23550

BANK NIFTY	
Spot	55403.60
Futures	55613.80
Highest CE OI (26 th MAY)	60000
Highest PE OI (26 th MAY)	60000
PCR (26 th MAY)	0.91
Key Supply Zones	56200, 57000
Key Demand Zones	55000, 54300





Index Trading View

- **Nifty** showed early strength on Wednesday but faced rejection near the 24,350 resistance, giving up most intraday gains. The index appears range-bound, and a break below 24,000 on Thursday could extend the decline by 150-200 points.
- **Bank Nifty** traded largely within the previous day's range, closing flat after shedding nearly 800 points from the high of 56,178. The 55,000 level is a key short-term support, a breakdown below this zone could intensify selling by up to 800 points.

Stocks in Bullish Momentum

ITC, VEDL.

Stocks in Bearish Momentum

INDIGO, SWIGGY.

Stocks in F&O ban list

Nil.



SECTORAL BREADTH

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty FMCG	51,771.80	1.75%	1.23%	13.69%	-6.68%
Nifty Realty	805.60	1.48%	2.15%	23.72%	-8.24%
Nifty Auto	26,085.75	1.15%	1.00%	9.74%	-7.46%
Nifty IT	29,245.20	0.99%	-2.92%	0.63%	-22.80%
Nifty Infrastructure	9,494.35	0.80%	1.89%	10.90%	-1.27%
Nifty Oil & Gas	11,769.25	0.71%	3.11%	9.10%	-3.78%
Nifty Metal	13,111.35	0.50%	2.54%	17.71%	17.40%
Nifty Pharma	23,260.85	0.44%	1.19%	4.63%	2.36%
Nifty Private Bank	26,514.60	0.44%	-1.23%	9.81%	-7.68%
Nifty Healthcare	14,941.05	0.25%	1.02%	5.21%	2.06%
Nifty Bank	55,403.60	0.01%	-1.60%	10.20%	-7.01%
Nifty Energy	40,961.40	-0.07%	2.41%	17.54%	15.95%
Nifty Financial Services	25,913.95	-0.09%	-1.27%	10.17%	-6.15%
Nifty Consumer Durables	37,868.05	-0.40%	1.52%	14.67%	3.03%
Nifty PSU Bank	8,627.70	-0.41%	-2.23%	9.58%	1.11%
Nifty Media	1,463.60	-0.49%	-0.17%	15.99%	1.31%

Sector Analysis

- Weak global cues and elevated crude suggest a cautious to negative bias for Indian markets, with energy stocks likely to outperform.
- **Nifty Realty** Index has approached its 100-day SMA, which is currently acting as a key resistance. Despite closing in the green, the index failed to sustain higher levels on Wednesday, giving up most of its intraday gains. This price action suggests waning momentum at higher levels, and a pullback of 4-6% from current levels cannot be ruled out. Given the unfavourable risk-reward, a cautious stance is recommended.
- **Results today (Nifty 200 index):** HINDUNILVR, ADANIPT, ADANIEN, BAJAJFINSV, CHOLAFIN, MAZDOCK, INDUSTOWER, NATIONALUM, LAURUSLAB.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2425.90	0.56	2127.52	2085.75	2256.89
ADANIPTS	1661.10	1.44	1509.82	1475.38	1443.75
APOLLOHOSP	7709.00	-0.57	7570.50	7589.44	7469.19
ASIANPAINT	2447.30	-0.62	2377.39	2333.54	2522.03
AXISBANK	1296.40	0.57	1311.24	1304.96	1224.08
BAJAJ_AUTO	9543.50	0.51	9471.45	9487.73	9075.56
BAJAJFINSV	1764.20	-0.83	1766.21	1840.45	1978.48
BAJFINANCE	930.00	0.69	896.37	922.74	961.74
BEL	437.55	0.41	438.99	439.59	413.13
BHARTIARTL	1888.10	2.40	1836.00	1870.88	1965.50
CIPLA	1317.60	0.85	1241.77	1282.72	1448.14
COALINDIA	479.90	2.76	449.34	443.57	405.88
DRREDDY	1329.80	-1.83	1248.96	1274.09	1257.14
EICHERMOT	7189.50	1.67	7040.80	7306.25	6864.02
ETERNAL	254.03	0.38	246.40	246.73	289.97
GRASIM	2803.20	0.73	2711.73	2734.67	2781.90
HCLTECH	1200.20	0.35	1367.67	1376.38	1513.92
HDFCBANK	779.00	-0.45	785.97	829.75	941.01
HDFCLIFE	594.40	0.72	599.48	644.26	728.76
HINDALCO	1067.20	-0.66	997.76	950.36	835.85
HINDUNILVR	2314.40	1.09	2200.82	2219.23	2384.25
ICICIBANK	1281.00	-0.85	1304.43	1320.86	1376.56
INDIGO	4345.20	-2.19	4463.52	4500.86	5266.53
INFY	1167.50	1.34	1272.13	1289.12	1479.02
ITC	316.25	3.88	301.89	307.26	371.55

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	250.71	-0.04	240.52	244.29	288.48
JSWSTEEL	1279.70	-0.15	1218.04	1210.54	1147.08
KOTAKBANK	382.00	1.07	372.54	387.54	410.60
LT	4096.10	1.45	3934.37	3925.43	3843.88
M&M	3152.30	2.08	3130.48	3218.04	3435.97
MARUTI	13257.00	2.83	13140.60	13625.54	14795.61
MAXHEALTH	1006.60	0.18	979.18	1013.33	1105.94
NESTLEIND	1465.60	1.78	1296.00	1268.78	1239.65
NTPC	401.30	-1.36	387.41	380.80	347.57
ONGC	301.40	0.03	287.03	278.11	252.12
POWERGRID	320.35	0.42	308.14	302.46	284.94
RELIANCE	1425.40	2.63	1349.92	1382.54	1435.14
SBILIFE	1816.20	0.44	1870.08	1931.56	1922.62
SBIN	1086.90	-0.40	1066.94	1108.32	963.55
SHRIRAMFIN	956.85	0.38	984.75	1007.30	829.99
SUNPHARMA	1778.70	1.80	1697.98	1736.81	1698.23
TATACONSUM	1168.00	1.77	1105.70	1108.05	1126.61
TATASTEEL	215.88	0.39	206.53	202.62	179.78
TCS	2474.70	1.23	2505.21	2528.56	2969.80
TECHM	1459.80	3.67	1446.97	1416.32	1503.38
TITAN	4439.80	0.52	4379.46	4253.38	3864.10
TMPV	352.70	0.54	339.13	345.10	378.20
TRENT	4228.30	-0.60	4005.29	3874.82	4466.93
ULTRACEMCO	11833.00	0.14	11579.15	11806.56	12096.33
WIPRO	200.68	-0.45	201.76	200.89	237.73

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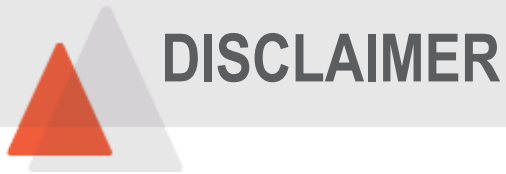
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