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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,349.92	-131.59	-0.26%
S&P 500	7,670.84	-12.85	-0.17%
NASDAQ 100	30,339.33	62.52	0.21%
FTSE 100	10,636.71	-48.17	-0.45%
NIKKEI (8:00 AM)	66,168.00	686.73	1.05%
HANG SENG (8:00 AM)	24,465.00	-58.57	-0.24%
GOLD	4,203.26	23.56	0.56%
SILVER	61.23	0.07	0.12%
BRENT OIL	96.32	0.16	0.17%
DOLLAR INDEX	101.08	-0.03	-0.03%
USD/INR	96.11	0.02	0.02%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- Bonds remained in focus as yields on long-dated **U.S. Treasuries** climbed to their highest levels since 2002, keeping pressure on risk assets.
- **Oil** prices rebounded on Wednesday after President Donald Trump ruled out easing sanctions on Iran, while Qatar pushed for renewed peace talks.
- **U.S. stocks** ended slightly lower on Tuesday as rising bond yields and uncertainty over the Federal Reserve's rate path weighed on sentiment ahead of key inflation and labour-market data.
- Easing concerns over crude supply helped **Asian stocks** recover after two sessions of losses, ahead of the crucial U.S. inflation reading.
- **GIFT Nifty** trading at ~22,809.00 is indicating a cautious start for the Indian market on Wednesday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,716.20	-64.05	-0.28%
SENSEX	72,529.07	-242.65	-0.33%
BANK NIFTY	54,259.95	-211.70	-0.39%
FIN NIFTY	24,648.50	-23.15	-0.09%
NIFTY MIDCAP 100	59,321.20	-593.00	-0.99%
NIFTY SMLCAP 100	19,174.85	-176.25	-0.91%
INDIA VIX	13.36	-0.28	-2.05%

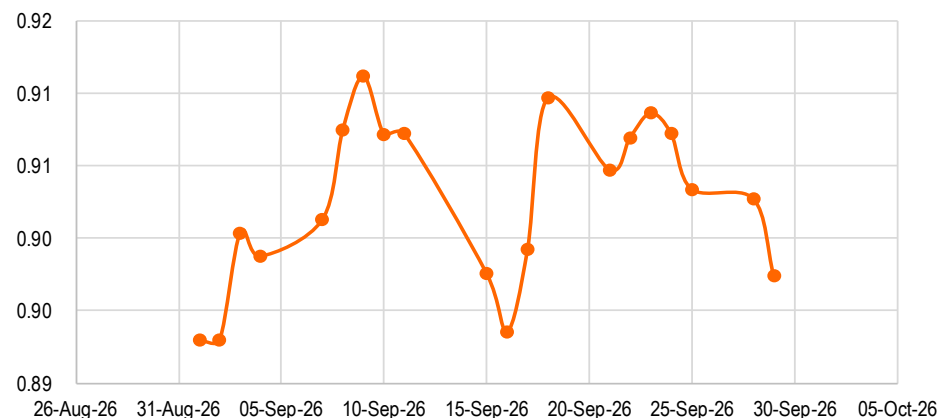
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	18	31	1
NIFTY 500	157	341	2
NIFTY F&O	55	156	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	6	12%
NIFTY 500	92	18%

Highlights

- The broader market witnessed a bounce from the lower levels on Tuesday, with Nifty absorbing a majority of the session's negativity while managing to hold above the crucial 22,500 level. The recovery indicates some buying interest at lower levels, although the overall market structure remains cautious.
- Fresh selling pressure was seen across the Auto and Consumer Durables segments, while weakness extended further in FMCG stocks. In contrast, Metal, Financial Services and Private Banking stocks witnessed a sharp rebound from their intraday lows, providing support to the broader market recovery.

MIDSML400 / NIFTY50 Ratio (last 20 trading sessions)





JSW Cement

The Board of Directors has approved a scheme of arrangement involving the amalgamation of Shiva Cement with and into JSW Cement, creating a single, unified cement platform aimed at unlocking operational, financial and management synergies.

Tata Steel

The company has acquired 393.51 crore equity shares in T Steel Holdings, aggregating to \$340 million (Rs 3,260.32 crore). Following the acquisition, TSHP will continue to be a wholly owned subsidiary of the company.

Britannia Industries

The Board has approved the appointment and re-designation of N Venkataraman, Whole-Time Director, as Deputy Managing Director of the company, effective October 1. The Board has also appointed Ramamurthy Jayaraman, Vice President – Corporate Finance, as Chief Financial Officer of the company, effective October 1.

Prestige Estates Projects

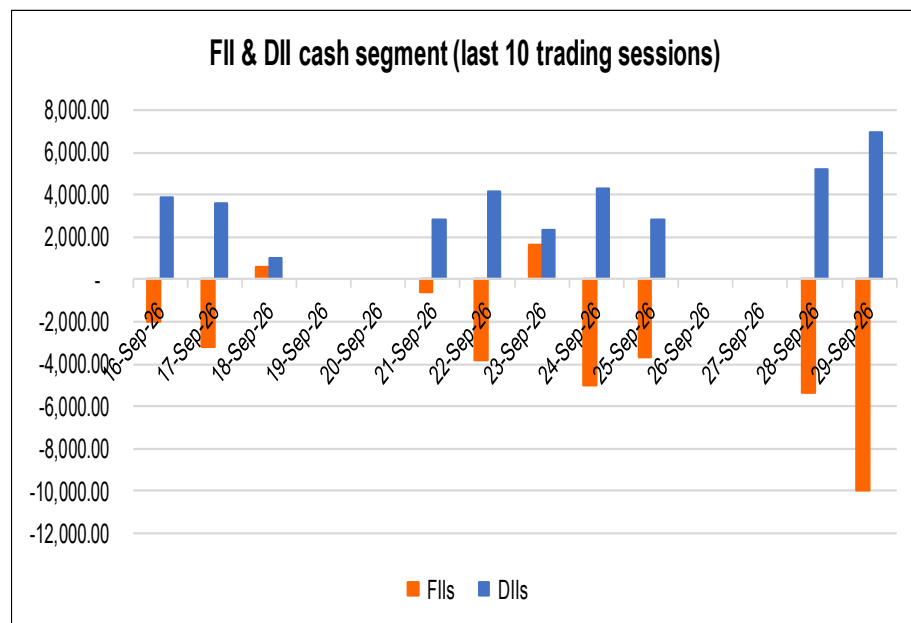
The company has completed two residential projects in Hyderabad, delivering 1,047 homes, including 928 residences at Prestige Clairemont and 119 villas at Bellagio. Meanwhile, Canada Pension Plan Investment Board (CPP Investments) has announced a Rs 3,000 crore investment in Prestige Hospitality Ventures (PHVL), the company's hospitality platform. With this investment, CPP Investments will acquire an approximately 27 percent stake in PHVL, supporting the platform's continued expansion.



INSTITUTIONAL ACTIVITY

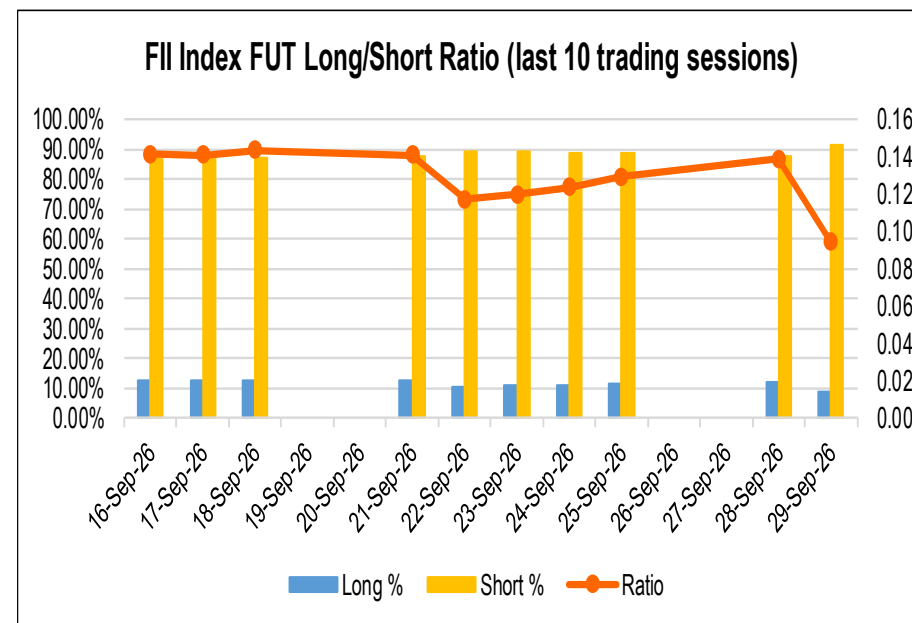
*INR in Crores

Cash Segment	29-Sept-2026	MTD	YTD
FII Net Flows	-9,980.22	-33,864.41	-3,92,919.07
DII Net Flows	6,952.71	64,758.56	6,28,263.12



*INR in Crores

FII's F&O Flows	29-Sept-2026	MTD
Index Futures	-1,167.00	-18,477.69
Index Options	-39,657.18	-86,682.47
Stock Futures	5,343.83	1,644.02
Stock Options	406.81	339.69



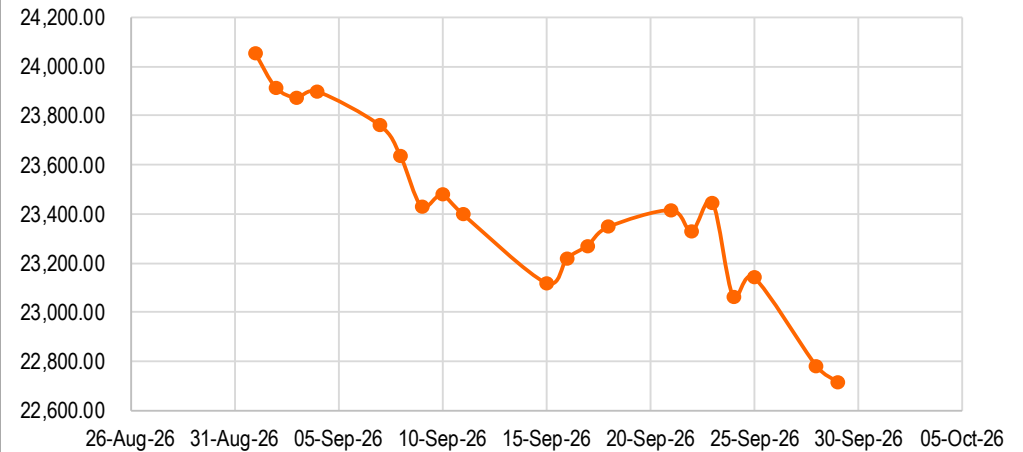


INDEX VIEW

NIFTY

Spot	22716.20
Futures	22865.70
Highest CE OI (27 th OCT)	23500
Highest PE OI (27 th OCT)	23500
PCR (27 th OCT)	1.04
Key Supply Zones	23000, 23300
Key Demand Zones	22500, 22150

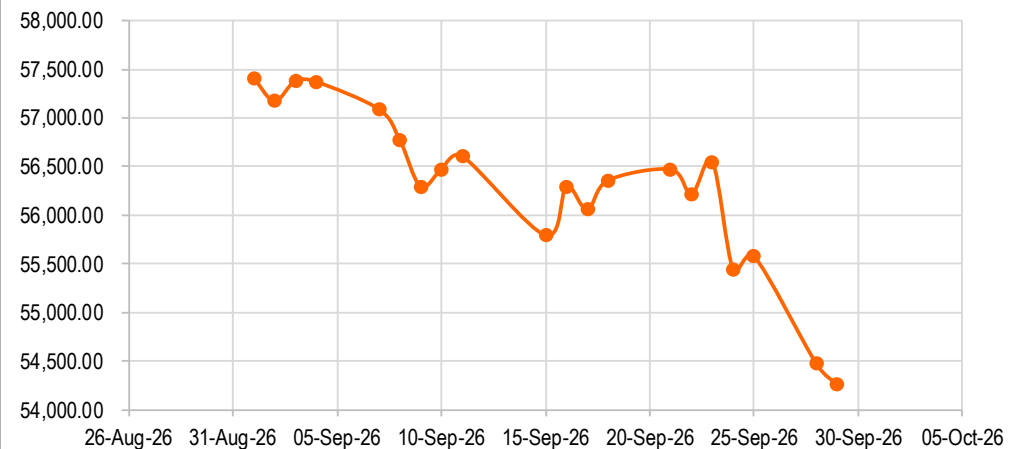
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	54259.95
Futures	54897.40
Highest CE OI (27 th OCT)	56000
Highest PE OI (27 th OCT)	58000
PCR (27 th OCT)	1.08
Key Supply Zones	54500, 55000
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	9,136.65	-1.02%	-3.43%	-5.99%	Under-performance	Under-performance	Under-performance
Nifty Infrastructure	8,738.50	-0.50%	-3.92%	-4.80%	Under-performance	Under-performance	Out-performance
Nifty Energy	36,513.05	-0.49%	-3.30%	-3.78%	Under-performance	Under-performance	Out-performance
Nifty Financial Services	24,648.50	-0.09%	-3.58%	-6.26%	Out-performance	Under-performance	Under-performance
Nifty IT	27,670.00	-1.48%	-2.34%	-11.29%	Under-performance	Out-performance	Under-performance
Nifty Realty	833.50	-2.04%	-4.31%	-7.81%	Under-performance	Under-performance	Under-performance
Nifty FMCG	44,791.30	-1.05%	-3.17%	-2.68%	Under-performance	Under-performance	Out-performance
Nifty Pharma	26,932.00	0.64%	-0.81%	-0.94%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,563.35	0.16%	-1.81%	-2.23%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	10,568.10	-0.87%	-3.97%	-4.82%	Under-performance	Under-performance	Out-performance
Nifty Auto	26,171.30	-1.33%	-3.63%	-9.26%	Under-performance	Under-performance	Under-performance
Nifty Metal	12,947.40	0.72%	-2.67%	-1.87%	Out-performance	Out-performance	Out-performance
Nifty PSU Bank	7,972.80	-0.66%	-4.69%	-7.40%	Under-performance	Under-performance	Under-performance
Nifty Private Bank	26,443.15	-0.13%	-3.36%	-5.58%	Out-performance	Under-performance	Out-performance
Nifty Bank	54,259.95	-0.39%	-4.05%	-6.49%	Under-performance	Under-performance	Under-performance
Nifty Consumer Durables	37,147.55	-2.66%	-2.76%	-8.12%	Under-performance	Out-performance	Under-performance

Stocks to watch: ADANI PORT, DRREDDY, GLENMARK, HYUNDAI.

Stocks in F&O ban: SAIL.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2972.90	5.01	2955.86	3004.41	2560.80
ADANIPTS	1822.00	4.49	1748.71	1724.26	1624.80
APOLLOHSP	8659.00	-2.27	8817.65	8834.12	8008.55
ASIANPAINT	2415.00	-0.21	2467.71	2605.38	2566.79
AXISBANK	1212.10	0.18	1241.05	1241.80	1285.31
BAJAJ_AUTO	10811.00	-1.93	11586.20	11579.99	10185.75
BAJAJFINSV	1742.40	-0.55	1876.67	1947.91	1890.54
BAJFINANCE	973.80	-1.14	1026.62	1062.69	977.47
BEL	387.75	0.58	398.47	401.75	417.90
BHARTIARTL	1771.20	-0.01	1831.54	1893.49	1914.11
CIPLA	1379.30	-0.32	1384.58	1418.35	1382.26
COALINDIA	425.00	0.59	420.78	415.59	432.27
DRREDDY	1251.90	2.53	1176.10	1175.24	1247.41
EICHERMOT	7179.00	-0.48	7542.27	7783.14	7407.68
ETERNAL	327.85	-0.94	327.12	318.65	276.41
GRASIM	3100.00	-1.59	3228.63	3231.06	2972.24
HCLTECH	1222.00	-2.44	1264.83	1299.39	1359.85
HDFCBANK	722.70	0.51	716.89	727.04	819.45
HDFCLIFE	523.55	-1.51	536.89	542.60	624.80
HINDALCO	955.20	-0.07	990.45	1004.61	977.12
HINDUNILVR	1863.80	-1.70	1945.04	2022.48	2190.70
ICICIBANK	1292.20	-0.75	1368.67	1406.74	1354.10
INDIGO	4872.00	-0.05	4938.68	5119.17	4822.70
INFY	1015.40	1.22	1060.19	1104.14	1271.46
ITC	265.10	-0.04	264.39	272.39	305.17

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	217.56	-1.33	230.16	240.41	250.13
JSWSTEEL	1272.40	0.66	1282.90	1286.22	1234.30
KOTAKBANK	406.00	1.11	414.80	403.39	400.03
LT	3749.10	-0.46	3899.22	3957.17	3971.08
M&M	2947.80	-1.58	3089.66	3254.05	3287.22
MARUTI	11877.00	-1.09	12385.50	13232.42	14012.41
MAXHEALTH	982.10	-1.80	1022.10	1039.40	1034.66
NESTLEIND	1345.70	-0.02	1384.08	1446.11	1360.39
NTPC	323.50	0.75	328.72	336.49	357.52
ONGC	230.00	0.00	234.98	237.75	256.67
POWERGRID	261.50	-0.13	266.15	271.51	283.88
RELIANCE	1182.00	-1.30	1258.38	1284.81	1367.18
SBILIFE	1735.00	0.40	1726.47	1786.21	1886.36
SBIN	964.70	0.28	996.22	1027.31	1041.14
SHRIRAMFIN	971.50	-0.49	1013.86	1061.77	1004.69
SUNPHARMA	1865.00	1.47	1870.05	1912.04	1807.41
TATACONSUM	967.70	0.80	998.23	1045.73	1115.24
TATASTEEL	188.00	0.91	185.91	186.31	193.74
TCS	2032.40	-1.85	2190.49	2282.51	2529.47
TECHM	1510.50	-2.06	1559.82	1591.89	1520.03
TITAN	4675.00	-3.00	4924.35	4954.08	4396.11
TMPV	280.95	-0.28	301.88	319.26	345.28
TRENT	2635.00	0.34	2777.02	2889.45	2775.24
ULTRACEMCO	10829.00	-1.78	11051.70	11503.20	11713.53
WIPRO	156.79	-2.95	168.37	176.41	202.75



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