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DAILY TECHNICAL & DERIVATIVES REPORT

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4th September, 2026

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,686.11	624.16	1.18%
S&P 500	7,747.71	81.11	1.06%
NASDAQ 100	29,482.32	338.99	1.16%
FTSE 100	10,831.52	75.07	0.70%
NIKKIE (8:00 AM)	64,782.00	567.52	0.88%
HANG SENG (8:00 AM)	25,759.00	545.69	2.16%
GOLD	4,519.10	-20.80	-0.46%
SILVER	67.27	-0.44	-0.64%
BRENT OIL	95.99	0.47	0.49%
DOLLAR INDEX	98.97	0.09	0.09%
USD/INR	94.54	0.05	0.06%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** advanced on Wednesday, marking a partial rebound from a three-day losing streak as investors bought into stocks and sectors that appeared oversold after recent risk-off moves.
- **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** declined further to 94.28 on Thursday, providing additional support to Indian equities, particularly IT and other rate-sensitive sectors.
- **GIFT Nifty** trading at ~24,023.00 is indicating a positive bias for the Indian market on Friday.

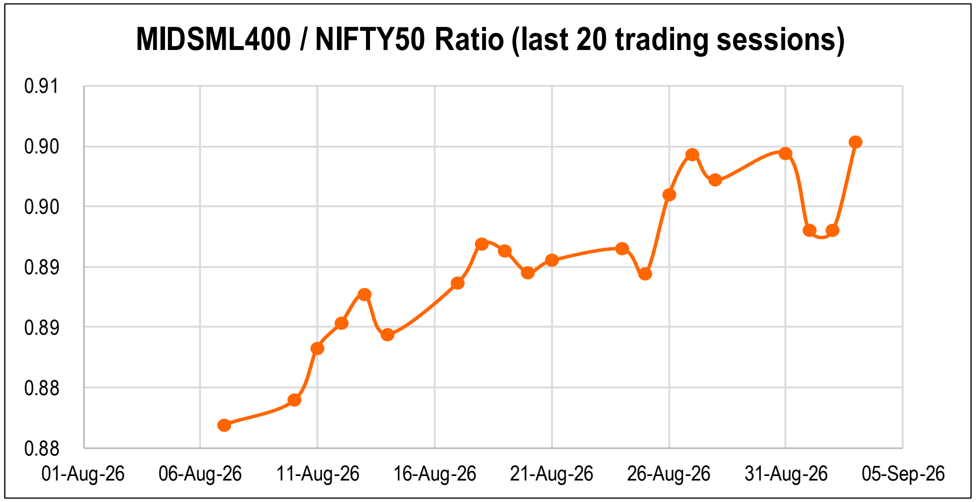
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,873.45	-41.00	-0.17%
SENSEX	76,152.86	-417.49	-0.55%
BANK NIFTY	57,380.60	208.60	0.36%
FIN NIFTY	25,923.05	110.00	0.43%
NIFTY MIDCAP 100	63,235.20	233.60	0.37%
NIFTY SMLCAP 100	20,050.75	238.50	1.20%
INDIA VIX	11.34	-0.26	-2.20%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	21	29	0
NIFTY 500	307	190	3
NIFTY F&O	109	100	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	15	30%
NIFTY 500	212	42%

Highlights

- Nifty's failure to sustain gains above 24,000 followed by sharp profit booking keeps the 24,000 level as an important near-term resistance.
- FMCG remained under pressure, with the Nifty FMCG index declining 0.62%, indicating continued weakness in the defensive segment.
- Realty extended its rebound for the second consecutive session, suggesting improving buying interest after the recent weakness.



INDIA KEY NEWS

RBL Bank

The bank has received a show-cause notice (SCN) from the Assistant Commissioner, Delhi, proposing a GST demand aggregating to Rs 164.13 crore, including applicable interest and penalty, for financial year 2022-23. The notice relates to an alleged mismatch between input tax credit reported in GST returns under the separate GST registration obtained for the bank's bullion business vertical.

WeWork India Management

The Board has given in-principle approval for setting up a 10 MWp captive solar power plant in Karnataka, aimed at reducing the company's electricity costs, increasing the use of renewable energy and supporting its sustainability objectives.

Cipla

The company's subsidiary, Invagen Pharmaceuticals Inc., has entered into a strategic partnership with Qilu Pharmaceutical Co. for the exclusive licensing and supply of QL2107, a biosimilar to Keytruda (pembrolizumab), in the United States. Under the agreement, Qilu will be responsible for the development, regulatory registration and supply of the product, while Cipla USA Inc. will be responsible for commercialising the asset by leveraging its strong commercial presence in the defined territory.

Cohance Lifesciences

Cohance Lifesciences has announced two proposed transactions to strengthen its antibody-drug conjugate (ADC) strategy – an additional investment of $13 million in NJ Bio and a controlling investment of $5 million in Aruka Bio. Both transactions will be funded through internal accruals.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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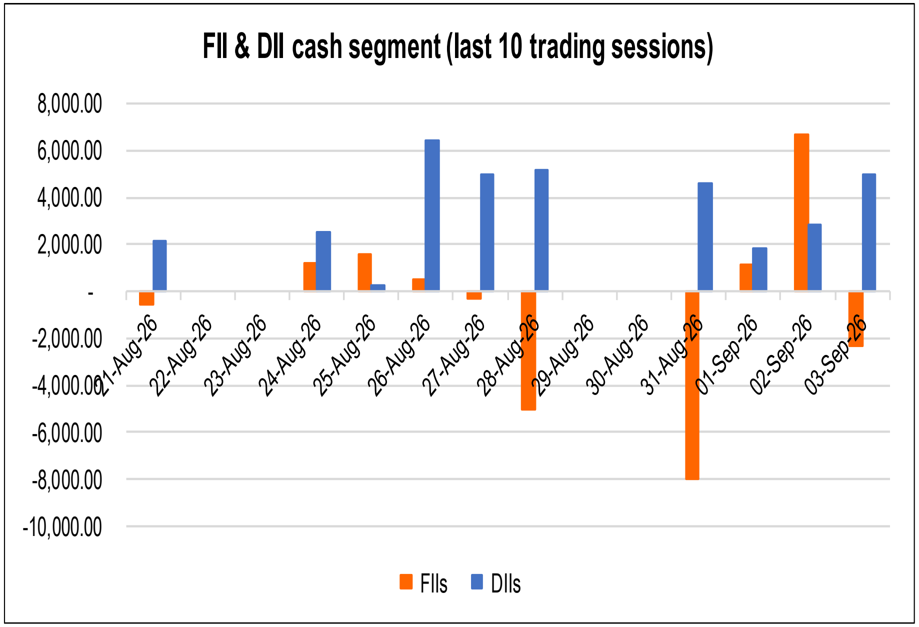
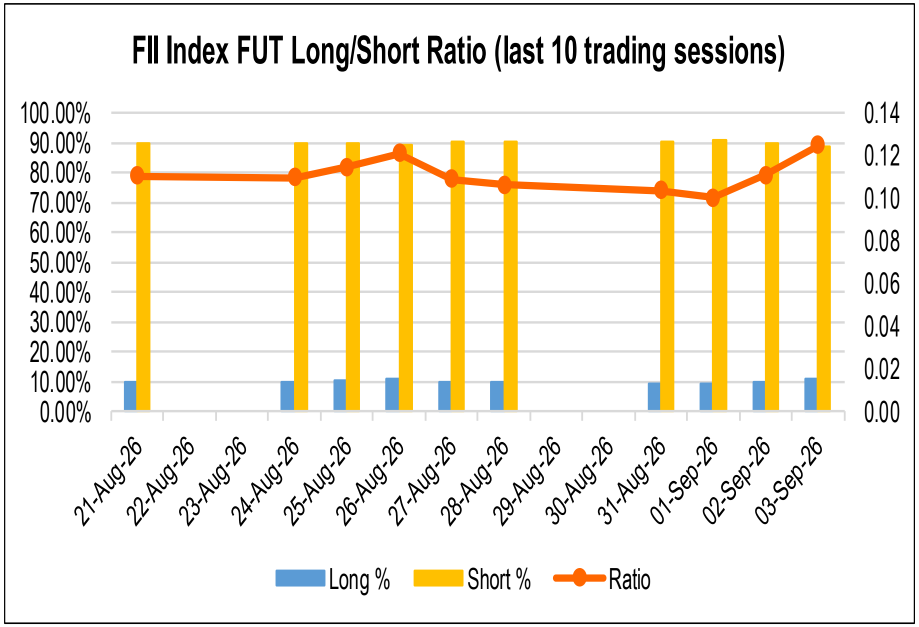
*INR in Crores

Cash Segment	3-Sept-2026	MTD	YTD
FII Net Flows	-2,345.87	5,485.88	-3,53,568.78
DII Net Flows	4,977.46	9,637.38	5,73,141.94

*INR in Crores

FIIs F&O Flows	3-Sept-2026	MTD
Index Futures	-926.15	-4,071.05
Index Options	7,186.18	-31,576.64
Stock Futures	1,120.89	2,399.68
Stock Options	220.92	-357.99





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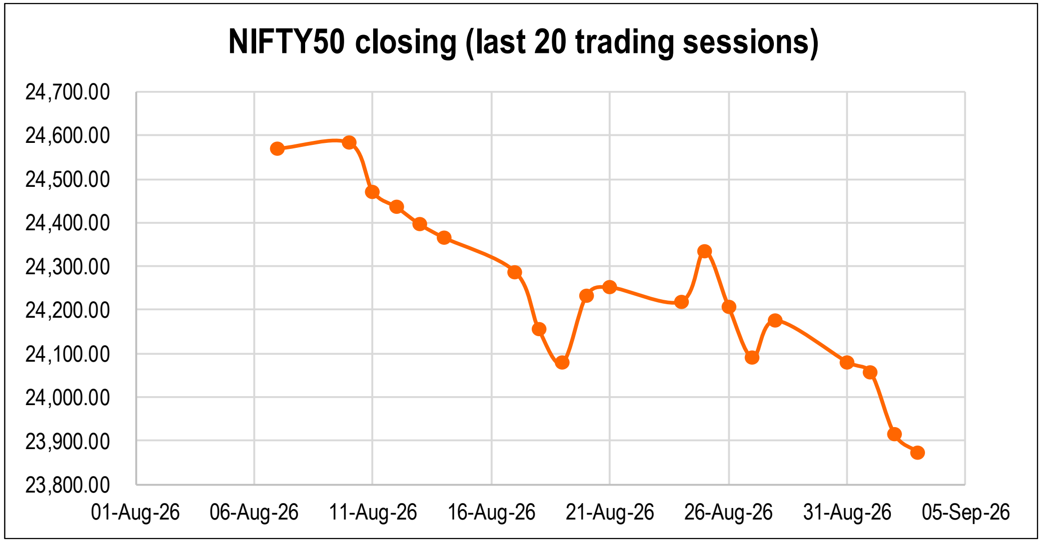
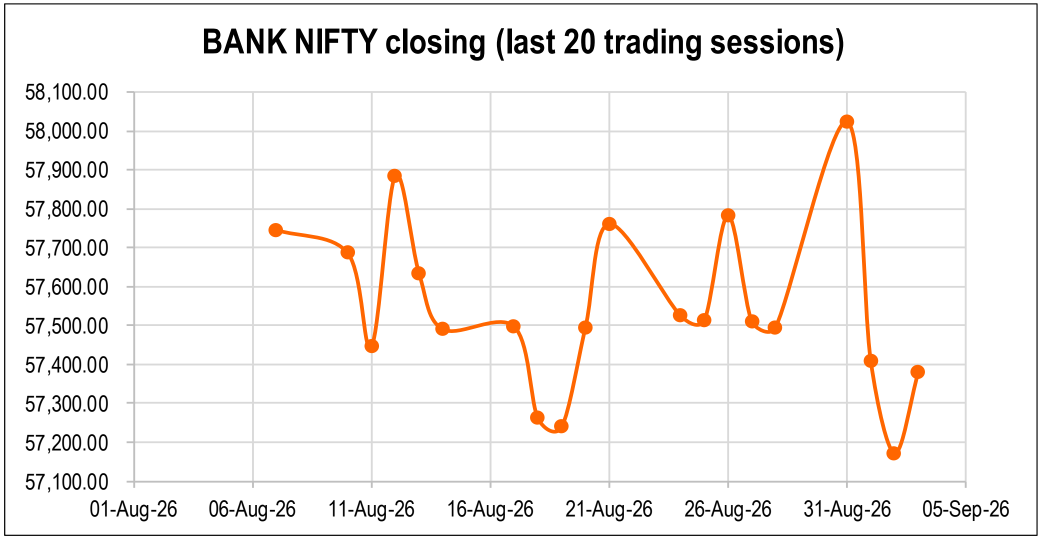
NIFTY	
Spot	23873.45
Futures	24000.10
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.12
Key Supply Zones	24000, 24350
Key Demand Zones	23650, 23000



BANK NIFTY	
Spot	57380.60
Futures	57713.40
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	1.04
Key Supply Zones	57800, 58500
Key Demand Zones	57000, 56000



KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2901.00	0.32	3003.86	3058.87	2506.57
ADANIPORTS	1706.50	2.02	1681.23	1746.81	1602.63
APOLLOHOSP	8692.00	-0.31	8780.30	8821.15	7880.13
ASIANPAINT	2541.60	0.56	2653.46	2684.36	2604.96
AXISBANK	1267.00	1.04	1245.61	1273.07	1288.20
BAJAJ_AUTO	11920.00	-1.73	11807.35	11102.96	9975.10
BAJAJFINSV	1992.10	0.11	2009.83	1945.45	1908.32
BAJFINANCE	1049.00	-0.65	1081.37	1062.15	977.26
BEL	408.60	0.70	409.36	407.07	419.30
BHARTIARTL	1869.00	0.33	1918.66	1919.42	1939.40
CIPLA	1394.70	-1.28	1433.34	1440.32	1394.10
COALINDIA	420.05	0.53	407.27	419.14	428.59
DRREDDY	1155.00	-0.13	1179.73	1216.40	1253.87
EICHERMOT	7690.00	-0.28	7997.12	7743.75	7370.12
ETERNAL	324.80	-0.76	322.66	303.16	274.20
GRASIM	3310.00	0.46	3297.64	3206.04	2931.78
HCLTECH	1319.00	-0.94	1329.59	1262.64	1392.08
HDFCBANK	706.65	0.83	721.97	757.60	843.29
HDFCLIFE	533.50	0.09	542.00	553.15	644.26
HINDALCO	1010.00	0.03	1039.24	995.44	961.47
HINDUNILVR	1962.00	-0.66	2031.38	2095.39	2229.26
ICICIBANK	1430.00	0.25	1424.05	1423.20	1356.04
INDIGO	4980.00	-0.80	5207.58	5247.21	4889.29
INFY	1130.30	-0.85	1145.19	1108.43	1314.63
ITC	263.00	-1.24	271.47	279.23	317.06

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	237.45	0.23	245.29	243.58	256.59
JSWSTEEL	1308.00	0.15	1300.98	1270.96	1223.55
KOTAKBANK	421.15	-0.55	403.93	394.30	400.82
LT	3975.00	-0.15	4049.42	3985.21	3983.07
M&M	3150.00	-1.25	3380.17	3276.17	3341.15
MARUTI	12857.00	0.06	13604.50	13786.84	14325.76
MAXHEALTH	994.90	0.09	1014.50	1069.61	1043.65
NESTLEIND	1416.00	-0.63	1474.48	1466.95	1350.62
NTPC	330.90	0.27	336.20	343.98	357.28
ONGC	236.00	-0.63	236.66	240.41	257.54
POWERGRID	265.60	-0.45	267.28	277.79	284.38
RELIANCE	1302.50	-0.81	1310.79	1303.03	1392.05
SBILIFE	1715.00	-0.28	1782.14	1814.35	1909.90
SBIN	1023.40	0.24	1054.76	1042.72	1039.45
SHRIRAMFIN	1044.20	-0.27	1108.59	1073.13	990.04
SUNPHARMA	1916.00	-0.81	1921.36	1929.06	1801.59
TATACONSUM	1019.20	0.71	1058.02	1082.40	1129.88
TATASTEEL	184.20	0.19	185.68	186.89	192.27
TCS	2320.10	-1.19	2338.46	2266.87	2613.55
TECHM	1598.00	-1.54	1612.52	1560.75	1516.02
TITAN	5027.00	-0.93	5079.14	4823.17	4308.10
TMPV	312.00	-0.24	325.10	333.04	350.48
TRENT	2815.60	-1.29	2931.73	2988.57	2782.69
ULTRACEMCO	11275.00	-1.04	11624.95	11703.30	11770.25
WIPRO	175.72	-0.77	181.25	179.15	209.79

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