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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,356.12	1,569.40	3.03%
S&P 500	7,688.62	119.70	1.58%
NASDAQ 100	28,437.17	256.90	0.91%
FTSE 100	10,829.21	190.78	1.79%
NIKKIE (8:00 AM)	62,002.00	-186.63	-0.30%
HANG SENG (8:00 AM)	24,682.50	763.00	3.19%
GOLD	4,136.92	63.92	1.57%
SILVER	53.17	0.89	1.70%
BRENT OIL	94.25	-0.37	-0.39%
DOLLAR INDEX	101.18	-0.21	-0.21%
USD/INR	94.57	0.03	0.03%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. equities** closed sharply higher on Wednesday as the Democrats' sweeping midterm election victory eased political uncertainty and lifted risk appetite. However, data-centre stocks declined amid concerns over tighter AI regulation.
- **Brent crude** steadied after tumbling more than 8% in the previous session, as investors anticipated that the Democratic sweep could accelerate efforts to end the Middle East conflict.
- **Gold** held on to its strongest single-session gain since August, supported by a weaker dollar and lower U.S. Treasury yields following the Democratic sweep.
- **GIFT Nifty** trading at ~24,298.00 is indicating a positive start for the Indian market on Thursday.

MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,960.60	149.75	0.63%
SENSEX	77,301.40	383.55	0.50%
BANK NIFTY	55,913.60	373.55	0.67%
FIN NIFTY	25,580.60	222.70	0.88%
NIFTY MIDCAP 100	59,505.50	909.25	1.55%
NIFTY SMLCAP 100	19,026.40	373.55	2.00%
INDIA VIX	15.17	-0.56	-3.53%

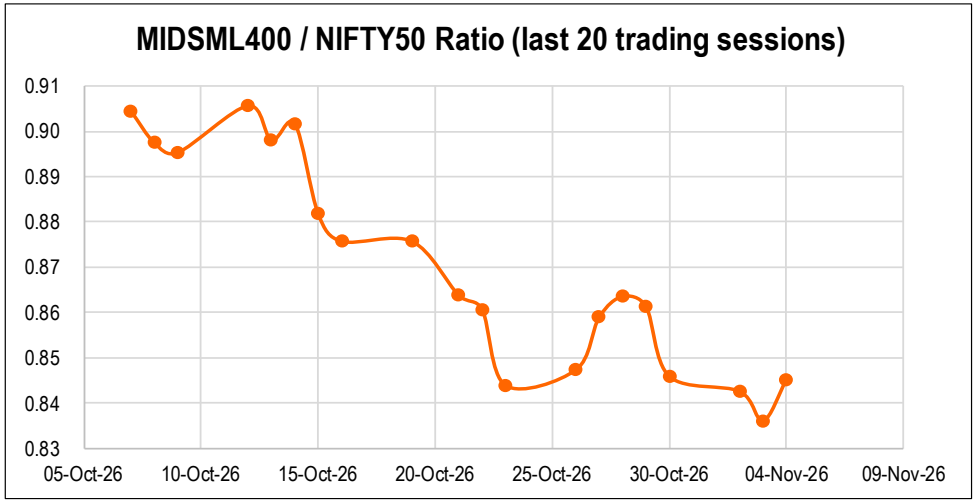
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	36	14	0
NIFTY 500	411	88	1
NIFTY F&O	182	36	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	31	62%
NIFTY 500	186	37%

Highlights

- Nifty extended its gains on Wednesday, although bulls seemed reluctant to challenge the key psychological resistance of 24000. Sectoral participation remained broad-based, with all major indices closing in positive territory, barring Nifty IT, which declined 1.50%.

- However, the recent market recovery remains largely large-cap driven, with broader market participation yet to catch up. While 62% of Nifty 50 constituents are trading above their respective 50-day moving averages, the corresponding figure for the Nifty MidSmallcap 400 index stands at just 34%, highlighting the relative weakness in the broader market.



Adani Power

Adani Power has signed a 25-year Power Supply Agreement with Uttarakhand Power Corporation Limited (UPCL) for the supply of 1,234 MW of ex-bus net thermal power, backed by an installed capacity of 1,320 MW.

*Source: moneycontrol.com

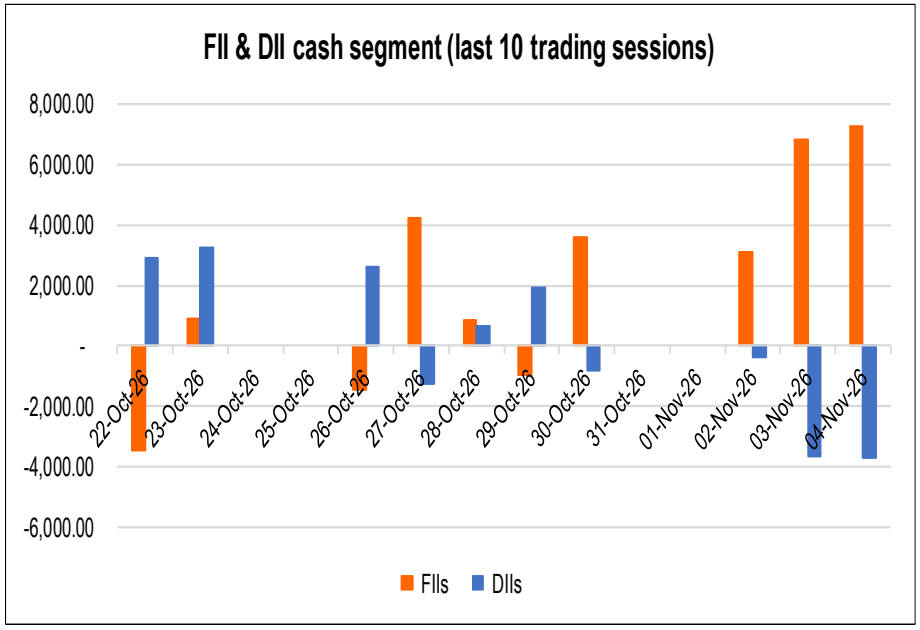
INSTITUTIONAL ACTIVITY

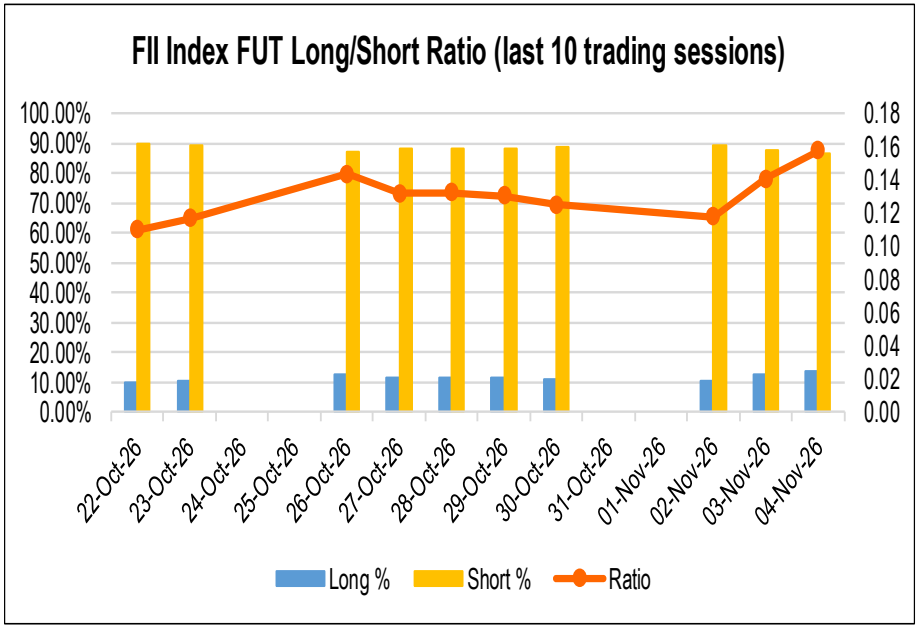
*INR in Crores

Cash Segment	4-Nov-2026	MTD	YTD
FII Net Flows	7,284.03	17,235.52	-4,30,993.67
DII Net Flows	-3,712.23	-7,783.28	6,93,971.68

*INR in Crores

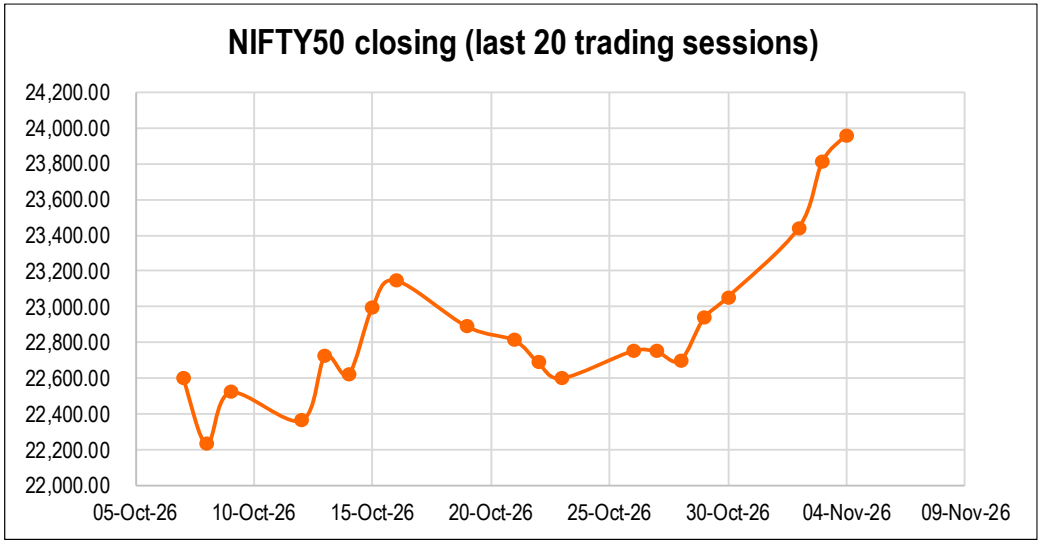
FIIs F&O Flows	4-Nov-2026	MTD
Index Futures	2,618.87	8,443.34
Index Options	-7,853.32	-172.35
Stock Futures	-126.93	6,645.32
Stock Options	-398.77	216.85



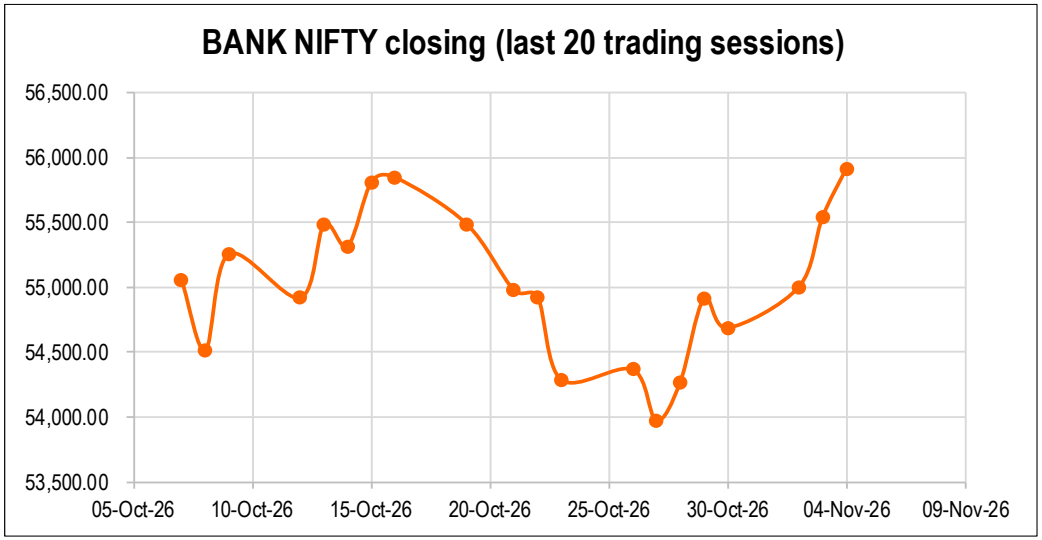


INDEX VIEW

NIFTY	
Spot	23960.60
Futures	23970.70
Highest CE OI (23rd NOV)	23500
Highest PE OI (23rd NOV)	23000
PCR (23rd NOV)	1.27
Key Supply Zones	24000, 24500
Key Demand Zones	23600, 23350



BANK NIFTY	
Spot	55913.60
Futures	55983.20
Highest CE OI (23rd NOV)	58000
Highest PE OI (23rd NOV)	55000
PCR (23rd NOV)	0.98
Key Supply Zones	56000, 56000
Key Demand Zones	55000, 54600



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	9,167.15	2.49%	3.20%	-1.93%	Strong Out-performance	Under-performing	Strong Under-performance
Nifty Infrastructure	9,317.30	1.00%	5.97%	5.91%	Out-performing	Out-performing	In Line
Nifty Energy	37,078.85	2.17%	5.04%	0.44%	Strong Out-performance	Out-performing	Strong Under-performance
Nifty Financial Services	25,580.60	0.88%	3.55%	2.54%	Out-performing	Under-performing	Under-performing
Nifty IT	32,061.90	-1.50%	0.61%	13.95%	Strong Under-performance	Strong Under-performance	Strong Out-performance
Nifty Realty	865.40	2.85%	5.56%	3.34%	Strong Out-performance	Out-performing	Under-performing
Nifty FMCG	46,264.05	1.50%	5.43%	2.34%	Out-performing	Out-performing	Under-performing
Nifty Pharma	27,333.45	0.42%	2.33%	2.95%	In Line	Strong Under-performance	Under-performing
Nifty Healthcare	16,701.55	0.73%	3.13%	3.73%	In Line	Under-performing	Under-performing
Nifty Oil & Gas	11,178.20	1.54%	7.98%	4.70%	Out-performing	Strong Out-performance	In Line
Nifty Auto	26,504.80	1.16%	3.35%	3.77%	Out-performing	Under-performing	Under-performing
Nifty Metal	12,485.90	2.80%	5.38%	-0.90%	Strong Out-performance	Out-performing	Strong Under-performance
Nifty PSU Bank	8,302.30	0.74%	-0.12%	3.67%	In Line	Strong Under-performance	Under-performing
Nifty Private Bank	27,632.30	0.29%	2.14%	1.99%	Under-performing	Strong Under-performance	Under-performing
Nifty Bank	55,913.60	0.67%	1.83%	1.42%	In Line	Strong Under-performance	Under-performing
Nifty Consumer Durables	36,521.45	2.04%	3.90%	-0.62%	Strong Out-performance	Under-performing	Strong Under-performance

Stocks to watch: ADANIENT, BDL, BEL, JIOFIN.

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	2709.20	4.47	2613.75	2824.87	2610.55
ADANIPORTS	1910.00	2.31	1778.38	1754.32	1659.96
APOLLOHOSP	8599.50	1.89	7970.67	8417.19	8112.65
ASIANPAINT	2418.30	-0.80	2335.21	2429.17	2513.24
AXISBANK	1232.00	-0.06	1237.37	1240.58	1282.55
BAJAJ_AUTO	10608.00	0.65	10222.15	10966.76	10304.12
BAJAJFINSV	1756.50	2.24	1703.47	1812.40	1851.22
BAJFINANCE	994.00	2.47	951.39	997.41	972.58
BEL	398.00	4.71	373.55	389.01	415.11
BHARTIARTL	2067.60	0.13	1902.45	1862.50	1888.81
BSE	3601.50	-1.75	3397.37	3317.74	3380.31
CIPLA	1402.00	0.37	1342.20	1368.33	1363.47
COALINDIA	399.65	-2.05	405.64	412.55	433.10
DRREDDY	1374.00	0.42	1270.55	1217.16	1247.54
EICHERMOT	7420.00	-0.27	7170.85	7413.09	7389.23
ETERNAL	344.50	-1.42	326.73	326.61	281.29
GRASIM	3138.00	1.55	2931.17	3099.15	2987.15
HCLTECH	1405.00	-2.37	1359.51	1304.26	1322.00
HDFCBANK	736.70	1.54	704.26	711.86	786.21
HDFCLIFE	532.50	1.33	536.01	537.61	597.82
HINDALCO	935.80	2.19	896.19	954.69	980.48
HINDUNILVR	1977.10	0.73	1865.45	1914.41	2136.12
ICICIBANK	1424.10	-0.03	1381.68	1378.03	1354.38
INDIGO	5140.80	2.30	4771.93	4905.68	4798.71
INFY	1128.20	-1.73	1114.03	1086.60	1208.39

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	280.00	2.23	263.25	264.18	290.75
JIOFIN	222.27	3.73	212.38	223.08	240.15
JSWSTEEL	1343.00	1.74	1230.68	1264.43	1247.17
KOTAKBANK	459.40	-1.13	445.28	427.44	401.06
LT	3944.40	-0.10	3725.22	3836.54	3930.36
M&M	2961.90	1.85	2858.64	3013.80	3190.31
MARUTI	11995.00	1.06	11422.65	12077.08	13398.18
MAXHEALTH	927.15	3.53	859.03	947.79	1012.00
NESTLEIND	1248.00	-0.03	1247.99	1334.01	1359.45
NTPC	321.95	0.12	310.72	321.44	355.39
ONGC	235.00	1.22	225.86	230.26	255.40
POWERGRID	262.05	0.96	252.92	260.25	282.65
RELIANCE	1311.00	0.24	1203.76	1235.46	1326.22
SBILIFE	1710.20	1.62	1666.46	1705.92	1842.84
SBIN	979.00	0.90	961.33	985.42	1038.73
SHRIRAMFIN	908.75	2.71	897.82	975.41	1001.55
SUNPHARMA	1773.40	0.20	1759.78	1826.95	1808.84
TATACONSUM	1068.00	-0.47	988.34	997.16	1092.03
TATASTEEL	179.93	1.94	173.15	180.38	193.75
TCS	2436.00	-2.52	2388.13	2275.05	2420.68
TECHM	1783.00	-0.34	1703.32	1619.38	1529.19
TITAN	4754.40	4.22	4426.14	4719.15	4449.93
TMPV	278.50	0.65	274.98	291.21	335.69
TRENT	3060.00	0.77	2909.62	2836.40	2787.88
ULTRACEMCO	11816.00	0.99	10982.85	11069.48	11617.60

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