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DAILY TECHNICAL & DERIVATIVES REPORT

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8th September, 2026

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA*	53,414.25	-271.86	-0.51%
S&P 500*	7,718.60	-29.11	-0.38%
NASDAQ 100*	29,544.16	61.83	0.21%
FTSE 100	10,822.13	-8.96	-0.08%
NIKKIE (8:00 AM)	66,484.00	84.16	0.13%
HANG SENG (8:00 AM)	25,232.00	-181.12	-0.71%
GOLD	4,470.60	-6.00	-0.13%
SILVER	67.38	0.64	0.95%
BRENT OIL	97.25	0.25	0.26%
DOLLAR INDEX	98.76	-0.39	-0.39%
USD/INR	94.50	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **U.S. markets** remained closed on Monday for the Labor Day holiday.
- **Asian markets** traded mixed as a combination of regional economic data and fresh Iranian threats in the Persian Gulf pushed oil prices and bond yields higher, keeping investor sentiment cautious.
- **GIFT Nifty** trading at ~23,787.00 is indicating a cautious start for the Indian market on Tuesday.

MARKET SNAPSHOT

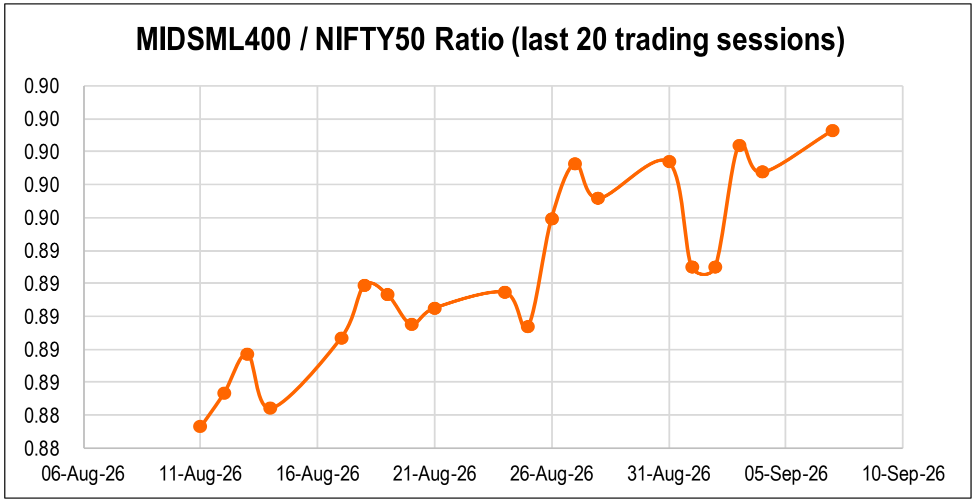
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,760.30	-137.40	-0.57%
SENSEX	76,132.81	-382.62	-0.50%
BANK NIFTY	57,088.30	-281.35	-0.49%
FIN NIFTY	25,928.60	-122.40	-0.47%
NIFTY MIDCAP 100	62,786.15	-292.90	-0.46%
NIFTY SMLCAP 100	20,100.20	4.75	0.02%
INDIA VIX	11.08	0.40	3.77%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	13	37	0
NIFTY 500	188	311	1
NIFTY F&O	56	154	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	12	24%
NIFTY 500	191	38%

Highlights

- Nifty fell 118 points, continuing its recent downward momentum amid persistent selling pressure. Weakness in IT stocks weighed significantly on Nifty, with the sector emerging as the key drag on the index. INFY declined 3.76% to close as Nifty's top loser, highlighting continued weakness among IT heavyweights.
- Nifty 500 declined 0.79% over the week and 2.34% over the month, while the typical stock fell only 0.47% and 1.10%, respectively. With 301 stocks outperforming the index weekly and 339 monthly, the weakness appears to be more concentrated in some larger-weight stocks, rather than being evenly spread across the broader market.



Mankind Pharma

Shareholders of Bharat Serums & Vaccines, a subsidiary of the company, have approved the voluntary liquidation of Bharat Serums & Vaccines.

GE Vernova T&D

The company has emerged as the L1 bidder for the design and establishment of a 6,000 MW, ±800 kV High Voltage Direct Current (HVDC) LCC terminal station (2x3,000 MW) for the evacuation of renewable power from Barmer II to South Kalamb.

Adani Power

Adani Power has received a Letter of Intent (LOI) from the Resolution Professional for the acquisition of GVK Energy, which owns and operates a 330 MW hydroelectric power plant located in Uttarakhand, through its subsidiary Alaknanda Hydro Power Company.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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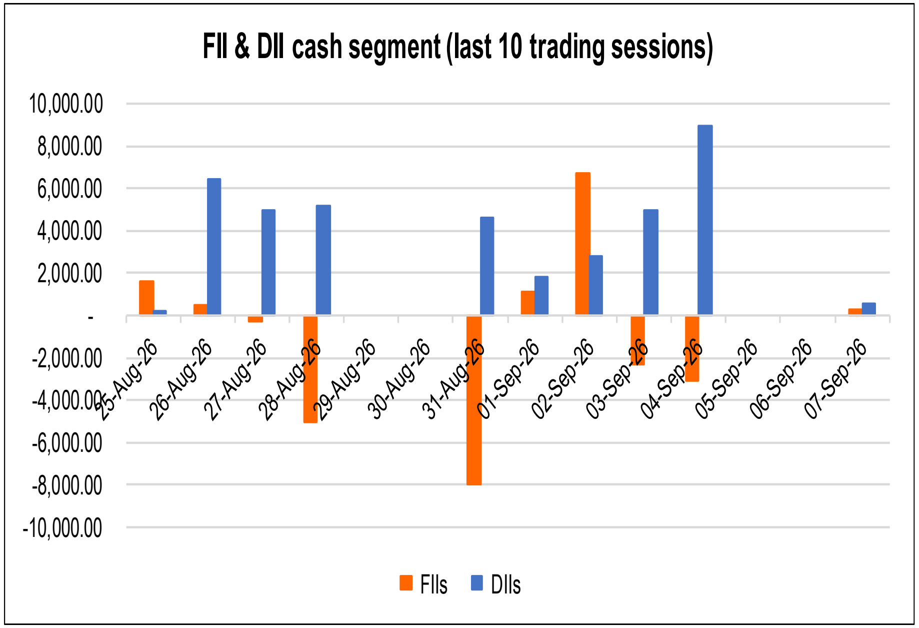
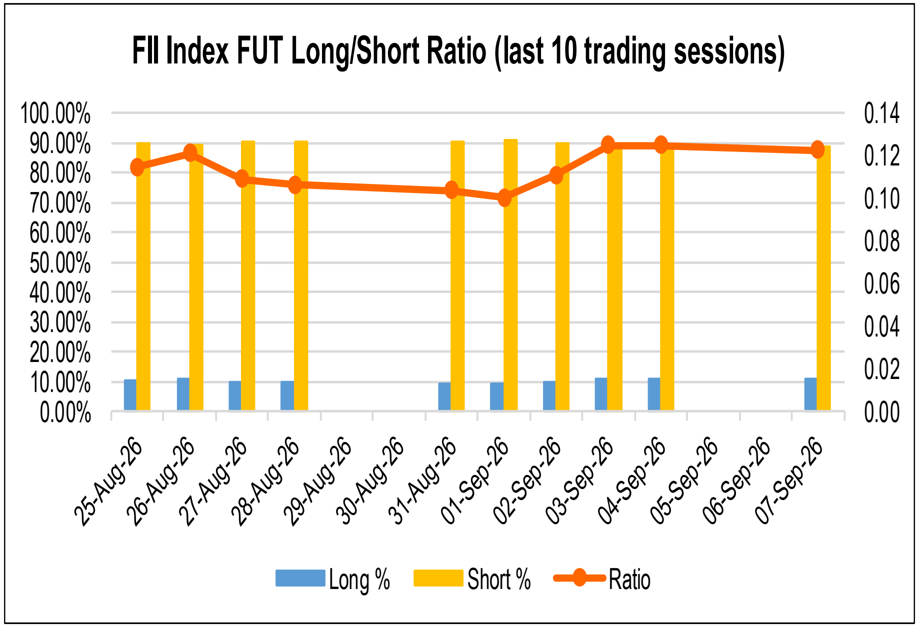
*INR in Crores

Cash Segment	7-Sept-2026	MTD	YTD
FII Net Flows	280.13	2,654.07	-3,56,400.59
DII Net Flows	566.76	19,134.26	5,82,638.82

*INR in Crores

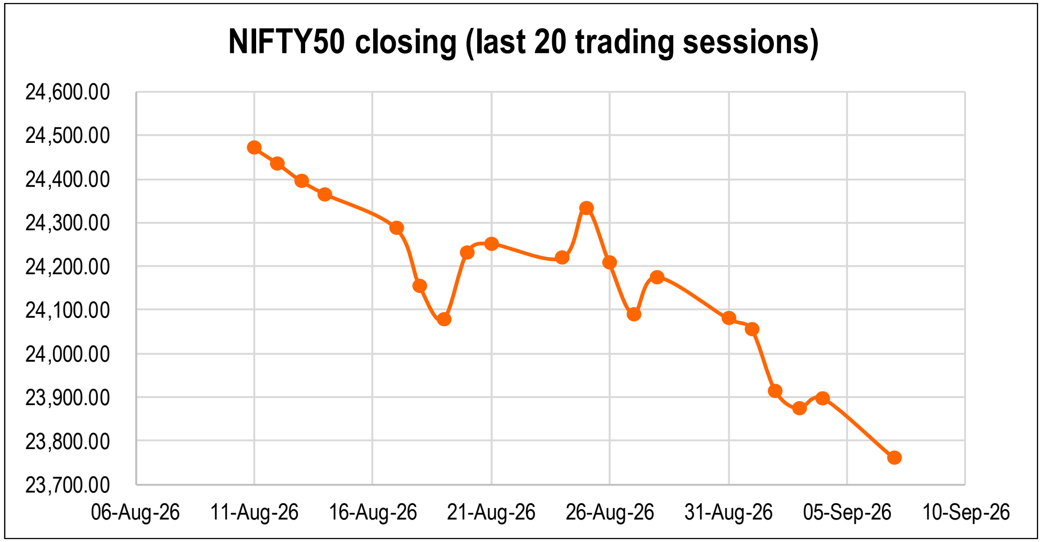
FIIs F&O Flows	7-Sept-2026	MTD
Index Futures	-2,262.33	-6,456.24
Index Options	9,651.39	-31,828.54
Stock Futures	-1,634.14	1,701.46
Stock Options	502.33	210.33



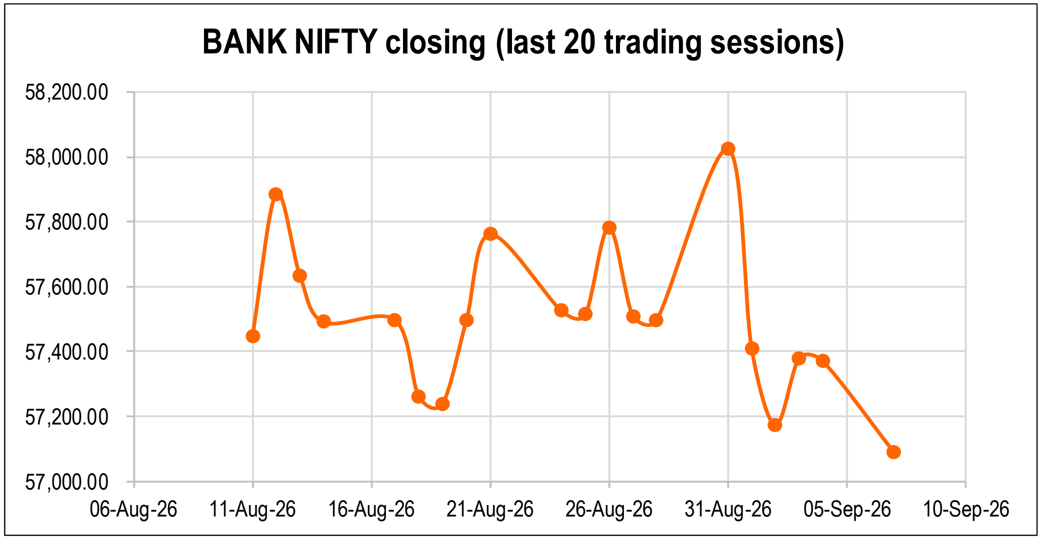


INDEX VIEW

NIFTY	
Spot	23760.30
Futures	23867.70
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.07
Key Supply Zones	24000, 24350
Key Demand Zones	23650, 23000



BANK NIFTY	
Spot	57088.30
Futures	57384.00
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	0.96
Key Supply Zones	57800, 58500
Key Demand Zones	57000, 56000



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	9,754.55	0.47%	1.11%	0.23%	Out-performance	Out-performance	Out-performance
Nifty Infrastructure	9,172.05	-0.28%	-0.40%	-3.49%	Out-performance	Out-performance	Under-performance
Nifty Energy	37,973.35	-0.25%	0.44%	-2.00%	Out-performance	Out-performance	Out-performance
Nifty Financial Services	25,928.60	-0.47%	-0.29%	-2.03%	Out-performance	Out-performance	Out-performance
Nifty IT	29,982.30	-2.32%	-4.81%	-4.96%	Under-performance	Under-performance	Under-performance
Nifty Realty	892.50	-1.70%	0.13%	0.74%	Under-performance	Out-performance	Out-performance
Nifty FMCG	45,592.15	-0.66%	-1.86%	-7.77%	Under-performance	Under-performance	Under-performance
Nifty Pharma	26,675.50	0.75%	-0.44%	0.50%	Out-performance	Out-performance	Out-performance
Nifty Healthcare	16,520.30	0.68%	-0.90%	-1.13%	Out-performance	Out-performance	Out-performance
Nifty Oil & Gas	11,118.85	-0.61%	-0.21%	-1.71%	Under-performance	Out-performance	Out-performance
Nifty Auto	27,698.75	-0.04%	-2.78%	-6.57%	Out-performance	Under-performance	Under-performance
Nifty Metal	13,152.90	-1.24%	-0.28%	-0.28%	Under-performance	Out-performance	Out-performance
Nifty PSU Bank	8,424.65	-1.06%	-0.95%	-4.11%	Under-performance	Out-performance	Under-performance
Nifty Private Bank	27,745.75	-0.28%	-0.06%	1.29%	Out-performance	Out-performance	Out-performance
Nifty Bank	57,088.30	-0.49%	-0.56%	-1.14%	Out-performance	Out-performance	Out-performance
Nifty Consumer Durables	39,318.80	-0.42%	-1.37%	-1.92%	Out-performance	Under-performance	Out-performance

Stocks to watch: NAM_INDIA, SBICARD.

Stocks in F&O ban: INOXWIND, KAYNES, LICHSGFIN, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2950.00	0.41	2996.76	3056.62	2511.50
ADANIPORTS	1694.30	-0.76	1682.59	1743.40	1604.54
APOLLOHOSP	8760.00	1.27	8757.95	8824.41	7892.64
ASIANPAINT	2500.90	-1.04	2630.62	2678.88	2601.13
AXISBANK	1266.00	-0.55	1248.30	1269.17	1288.44
BAJAJ_AUTO	11800.00	-1.00	11826.35	11187.88	10004.75
BAJAJFINSV	1938.60	-1.59	2003.75	1953.14	1907.14
BAJFINANCE	1060.00	-0.05	1078.38	1065.31	977.64
BEL	404.00	-0.33	409.56	406.88	419.09
BHARTIARTL	1854.00	0.76	1908.21	1919.47	1936.80
CIPLA	1395.00	0.72	1425.77	1438.03	1392.66
COALINDIA	418.85	0.84	407.67	418.22	428.89
DRREDDY	1144.20	-0.59	1177.95	1207.78	1252.89
EICHERMOT	7672.00	0.54	7962.50	7749.32	7379.16
ETERNAL	320.80	-0.60	323.58	305.74	274.35
GRASIM	3302.40	-0.59	3293.69	3214.39	2937.03
HCLTECH	1282.80	-0.82	1322.71	1270.10	1388.95
HDFCBANK	710.50	-0.22	720.00	754.15	840.47
HDFCLIFE	533.20	-2.42	541.98	551.37	641.93
HINDALCO	1006.00	-0.49	1034.41	997.44	963.50
HINDUNILVR	1960.00	-0.68	2018.89	2087.55	2225.03
ICICIBANK	1427.50	0.30	1423.95	1424.71	1356.53
INDIGO	5001.00	0.48	5173.15	5231.47	4880.28
INFY	1087.50	-3.76	1138.16	1111.22	1310.66
ITC	263.50	-0.23	269.42	278.17	315.62

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	234.40	-2.13	243.44	243.54	255.82
JSWSTEEL	1302.00	-1.74	1302.25	1274.23	1224.97
KOTAKBANK	422.10	-0.57	407.05	395.15	400.87
LT	3999.00	0.88	4040.77	3976.84	3982.72
M&M	3160.00	-0.32	3345.72	3277.27	3335.63
MARUTI	12760.00	0.52	13470.50	13752.78	14295.22
MAXHEALTH	992.00	0.73	1006.39	1063.68	1042.41
NESTLEIND	1398.00	-0.89	1461.47	1467.33	1351.96
NTPC	332.00	-0.15	335.27	343.11	357.31
ONGC	233.70	-0.40	236.14	240.44	257.40
POWERGRID	266.45	0.17	266.82	277.03	284.32
RELIANCE	1309.50	-0.95	1309.26	1303.28	1390.02
SBILIFE	1732.00	-2.42	1771.96	1814.48	1907.45
SBIN	1005.90	-1.00	1047.45	1041.53	1039.86
SHRIRAMFIN	1037.00	-0.38	1099.86	1073.40	992.30
SUNPHARMA	1895.00	-0.21	1916.59	1930.19	1802.95
TATACONSUM	1015.00	0.50	1049.72	1078.02	1128.33
TATASTEEL	185.61	-1.68	185.51	186.82	192.40
TCS	2270.00	-1.48	2323.24	2274.50	2605.38
TECHM	1564.00	-2.06	1606.82	1566.55	1517.36
TITAN	4995.00	-0.50	5078.34	4852.10	4319.68
TMPV	307.00	-1.44	321.32	331.45	349.76
TRENT	2814.50	-1.35	2914.00	2972.43	2781.71
ULTRACEMCO	11175.00	-2.04	11546.95	11698.46	11764.91
WIPRO	172.80	-2.04	180.06	179.12	209.10

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