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DAILY TECHNICAL & DERIVATIVES REPORT

- Macro Pulse
- Market Snapshot
- India Key News
- Institutional Activity
- Index View
- Sectors & Stocks
- Key Moving Averages

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Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	52,786.07	-628.18	-1.18%
S&P 500	7,673.52	-45.08	-0.58%
NASDAQ 100	29,507.70	-36.45	-0.12%
FTSE 100	10,811.66	-10.47	-0.10%
NIKKIE (8:00 AM)	65,448.00	178.67	0.27%
HANG SENG (8:00 AM)	25,246.00	-71.18	-0.28%
GOLD	4,414.36	-24.64	-0.56%
SILVER	66.60	-0.40	-0.60%
BRENT OIL	99.27	1.35	1.38%
DOLLAR INDEX	98.79	0.01	0.01%
USD/INR	94.82	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **The S&P 500** closed lower on Tuesday, dragged down by Salesforce and other software stocks, while escalating Middle East tensions pushed oil prices higher. Investors also remained cautious ahead of inflation data that could influence expectations for a U.S. rate hike.
- **Asian markets** traded higher in early Wednesday trade, with South Korea's Kospi gaining over 1%, supported by strong moves in chipmakers SK Hynix and Samsung Electronics.
- The **USD/INR** bounced from the 94.15 demand zone to close at 94.81 on Tuesday, indicating renewed buying interest in the dollar.
- **GIFT Nifty** trading at ~23,649.00 is indicating a negative bias for the Indian market on Wednesday.

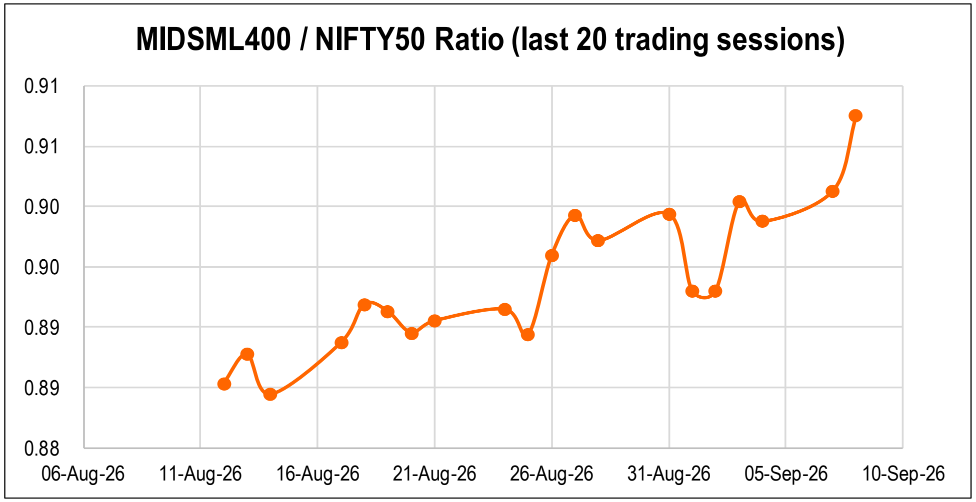
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	23,635.10	-144.05	-0.61%
SENSEX	75,577.58	-555.23	-0.73%
BANK NIFTY	56,777.55	-310.75	-0.54%
FIN NIFTY	25,695.55	-240.05	-0.93%
NIFTY MIDCAP 100	62,915.80	129.65	0.21%
NIFTY SMLCAP 100	20,133.75	33.55	0.17%
INDIA VIX	11.23	0.07	0.63%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	17	31	2
NIFTY 500	230	266	4
NIFTY F&O	92	114	4

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	11	22%
NIFTY 500	199	40%

Highlights

- Nifty closed marginally below the key support zone of 23650, keeping the near-term trend under pressure.
- The Nifty India Defence Index hit a fresh all-time high of 9,998.70, highlighting continued sectoral strength. Buying interest in Pharma & Healthcare segments provided some relief amid broader market weakness.
- Nifty's decline was largely driven by a relatively small number of higher-weight stocks, while the broader market remained comparatively resilient. Despite 68% stocks outperforming the index, Nifty 50 declined 0.61%, while the median stock fell only 0.29%.



Laxmi Organic Industries

Rajan Venkatesh has resigned as Managing Director and Chief Executive Officer (MD & CEO) of Laxmi Organic Industries, effective November 13, 2026, to pursue opportunities outside the company. The Board has appointed Harshvardhan Goenka, currently the Executive Director of the company, as MD & CEO for a period of five years, effective November 14, 2026.

Great Eastern Shipping Company

Great Eastern Shipping Company has contracted to purchase a second-hand Kamsarmax dry bulk carrier of approximately 81,609 dwt. The 2019-built vessel is expected to join the company's fleet in Q3 FY27. The proposed vessel will be financed entirely through internal accruals.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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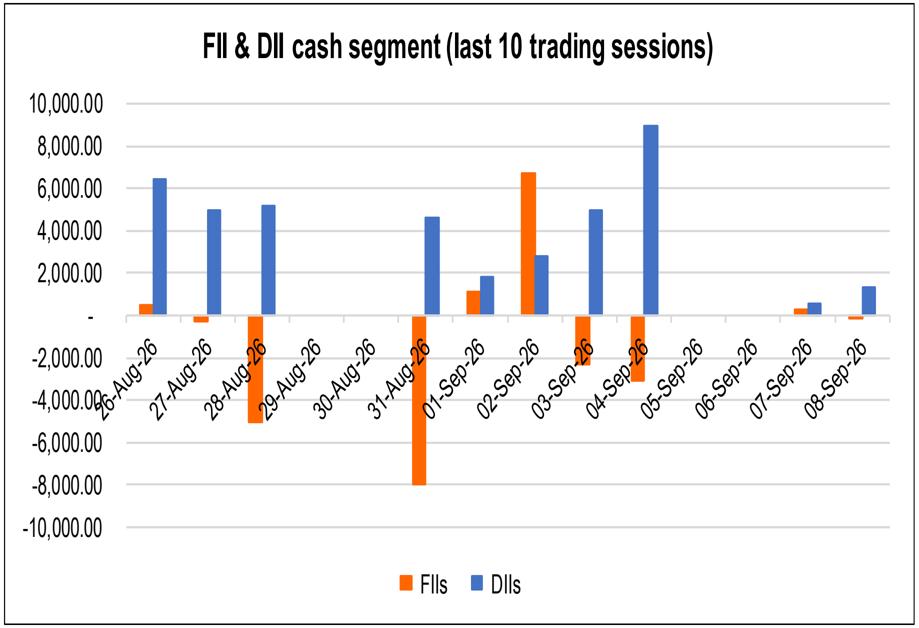
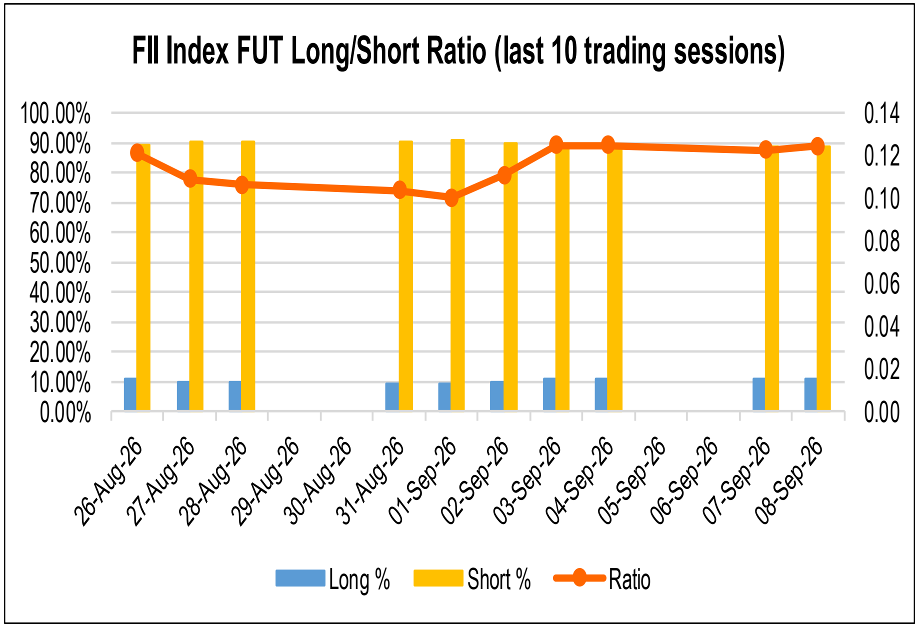
*INR in Crores

Cash Segment	8-Sept-2026	MTD	YTD
FII Net Flows	-123.19	2,530.88	-3,56,523.78
DII Net Flows	1,349.64	20,483.90	5,83,988.46

*INR in Crores

FIIs F&O Flows	8-Sept-2026	MTD
Index Futures	-1,822.58	-8,278.82
Index Options	17,952.86	-13,875.68
Stock Futures	-427.91	1,273.55
Stock Options	151.11	361.44





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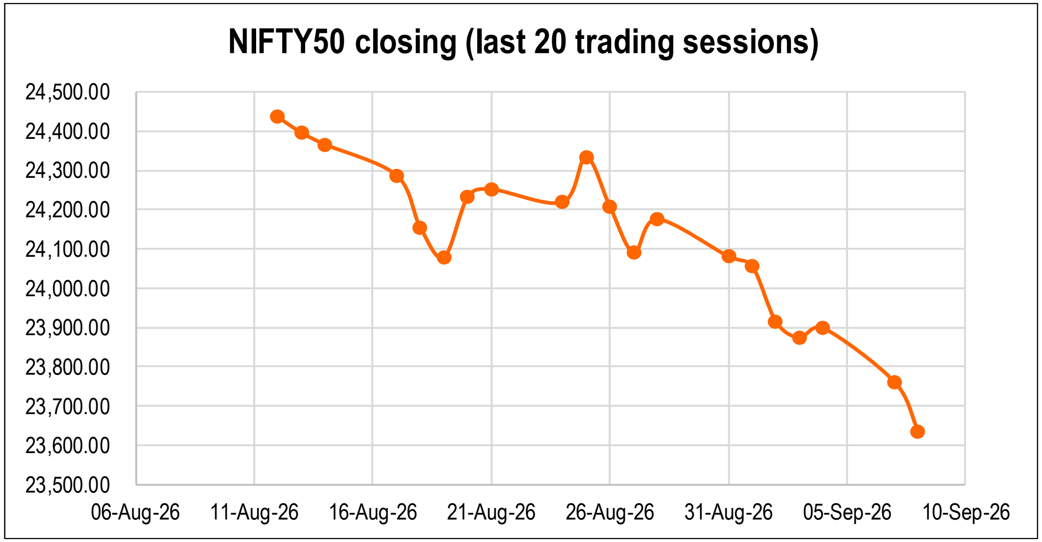
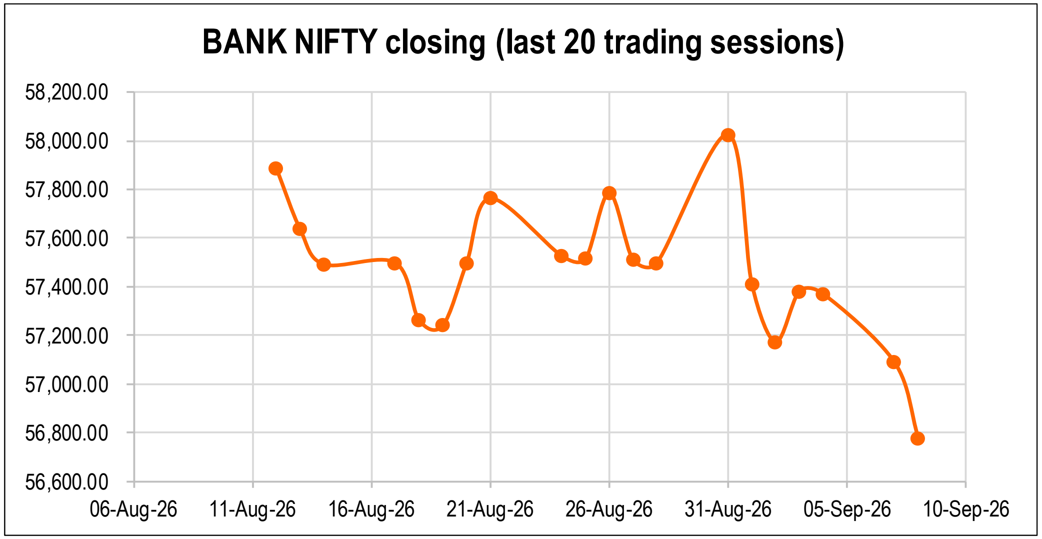
NIFTY	
Spot	23635.10
Futures	23749.60
Highest CE OI (29th SEPT)	24000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.04
Key Supply Zones	23800, 24000
Key Demand Zones	23300, 23000



BANK NIFTY	
Spot	56777.55
Futures	57128.20
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	0.88
Key Supply Zones	57200, 57800
Key Demand Zones	56000, 55500



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	9,998.70	2.50%	3.92%	3.77%	Out-performing	Out-performing	Out-performing
Nifty Infrastructure	9,144.05	-0.49%	-0.74%	-3.40%	Out-performing	Out-performing	Out-performing
Nifty Energy	38,093.50	0.32%	0.17%	-1.69%	Out-performing	Out-performing	Out-performing
Nifty Financial Services	25,695.55	-0.93%	-0.46%	-3.20%	Under-performing	Out-performing	Out-performing
Nifty IT	29,883.45	-0.37%	-3.92%	-5.53%	Out-performing	Under-performing	Under-performing
Nifty Realty	892.05	-0.05%	-0.12%	-0.66%	Out-performing	Out-performing	Out-performing
Nifty FMCG	45,749.85	0.35%	-1.06%	-7.32%	Out-performing	Out-performing	Under-performing
Nifty Pharma	26,880.80	0.77%	0.37%	1.52%	Out-performing	Out-performing	Out-performing
Nifty Healthcare	16,624.60	0.63%	-0.03%	-0.16%	Out-performing	Out-performing	Out-performing
Nifty Oil & Gas	11,044.75	-0.67%	-1.20%	-2.00%	Under-performing	Under-performing	Out-performing
Nifty Auto	27,775.35	0.28%	-0.74%	-6.23%	Out-performing	Out-performing	Under-performing
Nifty Metal	13,155.95	0.02%	-0.01%	-0.53%	Out-performing	Out-performing	Out-performing
Nifty PSU Bank	8,412.35	-0.15%	-1.17%	-2.63%	Out-performing	At Par	Out-performing
Nifty Private Bank	27,474.70	-0.98%	-0.48%	-0.22%	Under-performing	Out-performing	Out-performing
Nifty Bank	56,777.55	-0.54%	-0.69%	-1.58%	Out-performing	Out-performing	Out-performing
Nifty Consumer Durables	39,224.50	-0.24%	-1.30%	-2.53%	Out-performing	Under-performing	Out-performing

Stocks to watch: BANDHANBNK, LAURUSLAB, NYKAA.

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

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2953.10	0.11	2994.64	3054.96	2514.08
ADANIPORTS	1710.00	0.93	1684.68	1741.40	1605.61
APOLLOHOSP	8837.50	0.88	8762.30	8827.52	7899.90
ASIANPAINT	2481.60	-0.77	2617.92	2675.80	2599.00
AXISBANK	1244.90	-1.67	1249.05	1267.16	1288.34
BAJAJ_AUTO	11880.00	0.68	11834.50	11231.16	10019.55
BAJAJFINSV	1938.10	-0.03	1999.05	1956.30	1906.58
BAJFINANCE	1054.10	-0.56	1076.42	1066.30	977.84
BEL	410.55	1.62	409.80	406.86	419.04
BHARTIARTL	1844.00	-0.54	1904.65	1919.31	1935.28
CIPLA	1384.00	-0.79	1421.82	1436.41	1392.01
COALINDIA	420.25	0.33	408.05	417.85	429.07
DRREDDY	1151.00	0.59	1175.25	1203.66	1252.43
EICHERMOT	7747.50	0.98	7949.87	7762.80	7383.83
ETERNAL	321.60	0.25	323.76	306.88	274.43
GRASIM	3306.80	0.13	3292.92	3218.53	2939.76
HCLTECH	1277.00	-0.45	1318.29	1274.20	1387.36
HDFCBANK	703.00	-1.06	718.70	752.25	839.02
HDFCLIFE	533.80	0.11	541.87	550.53	640.79
HINDALCO	1009.00	0.30	1032.40	998.49	964.56
HINDUNILVR	1980.00	1.02	2014.65	2084.79	2223.10
ICICIBANK	1399.40	-1.97	1422.44	1425.20	1356.66
INDIGO	5000.00	-0.02	5158.95	5224.10	4876.58
INFY	1082.00	-0.51	1132.72	1112.85	1308.64
ITC	263.50	0.00	268.64	277.70	314.91

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	233.15	-0.53	242.46	243.47	255.46
JSWSTEEL	1297.30	-0.36	1302.95	1275.65	1225.64
KOTAKBANK	419.25	-0.68	408.37	395.69	400.88
LT	3946.10	-1.32	4036.21	3972.89	3982.46
M&M	3160.00	0.00	3330.72	3279.09	3332.96
MARUTI	12641.00	-0.93	13403.05	13723.30	14278.78
MAXHEALTH	993.00	0.10	1004.04	1060.96	1041.79
NESTLEIND	1400.50	0.18	1456.84	1467.23	1352.63
NTPC	330.80	-0.36	334.89	342.59	357.32
ONGC	236.00	0.98	235.97	240.46	257.35
POWERGRID	265.75	-0.26	266.71	276.62	284.28
RELIANCE	1294.90	-1.11	1307.81	1303.30	1388.90
SBILIFE	1696.60	-2.04	1764.91	1813.10	1905.97
SBIN	1008.00	0.21	1044.55	1041.16	1040.03
SHRIRAMFIN	1029.00	-0.77	1094.81	1073.14	993.34
SUNPHARMA	1885.90	-0.48	1913.79	1930.65	1803.59
TATACONSUM	1014.10	-0.09	1046.53	1076.79	1127.63
TATASTEEL	184.15	-0.79	185.31	186.74	192.46
TCS	2255.50	-0.64	2313.73	2278.98	2601.22
TECHM	1559.00	-0.32	1602.62	1569.63	1518.05
TITAN	4987.00	-0.16	5071.29	4863.76	4325.22
TMPV	306.45	-0.18	319.26	330.53	349.43
TRENT	2793.60	-0.74	2903.68	2962.65	2781.10
ULTRACEMCO	11009.00	-1.49	11508.40	11693.58	11761.42
WIPRO	171.50	-0.75	179.41	179.15	208.75

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