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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,343.40	-116.38	-0.22%
S&P 500	7,691.76	-53.30	-0.69%
NASDAQ 100	29,490.96	-504.42	-1.68%
FTSE 100	10,728.04	7.74	0.07%
NIKKIE (8:00 AM)	65,738.00	-1,722.73	-2.55%
HANG SENG (8:00 AM)	25,475.50	4.35	0.02%
GOLD	4,410.09	-10.51	-0.24%
SILVER	63.11	-0.93	-1.45%
BRENT OIL	91.80	0.78	0.86%
DOLLAR INDEX	99.49	-0.06	-0.06%
USD/INR	95.80	0.12	0.12%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street's** major indices ended lower on Tuesday, led by weakness in semiconductor stocks as renewed Middle East uncertainty pushed bond yields to multi-year highs. Higher yields increased concerns over borrowing costs and persistent inflation, weighing particularly on technology and high-valuation stocks.

- **Asian markets** followed the negative trend on Wednesday, with South Korea leading the selloff in semiconductor stocks. Rising bond yields further intensified concerns over the massive capital expenditure being undertaken by Big Tech companies for AI infrastructure and whether these investments can generate adequate returns.

- **GIFT Nifty** trading at ~24,219.00 is indicating a positive bias for the Indian market on Wednesday.

MARKET SNAPSHOT

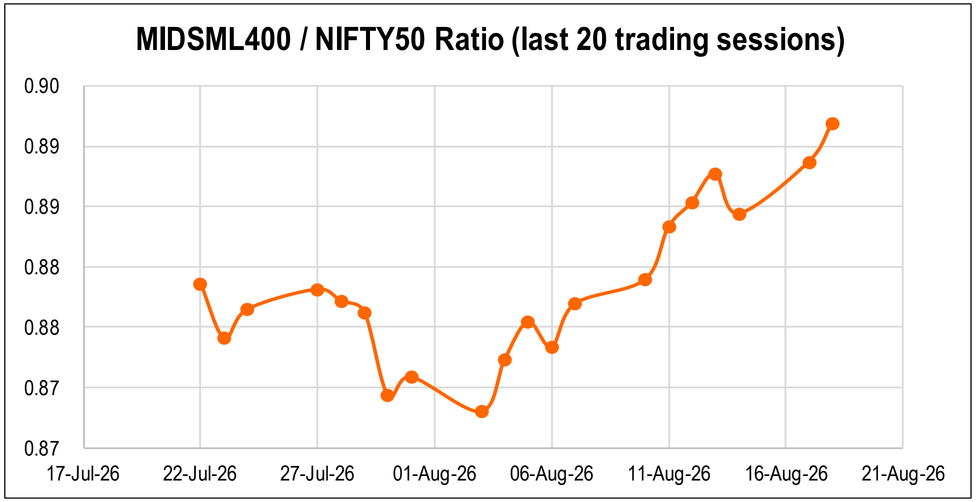
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,154.90	-132.75	-0.55%
SENSEX	77,235.46	-492.70	-0.63%
BANK NIFTY	57,262.40	-235.40	-0.41%
FIN NIFTY	26,108.00	-109.15	-0.42%
MIDCAP NIFTY	14,840.75	-107.85	-0.72%
NIFTY SMLCAP 250	18,346.75	34.55	0.19%
INDIA VIX	11.39	0.06	0.53%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	10	40	0
NIFTY 500	190	306	4
NIFTY F&O	66	141	1

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	25	50%
NIFTY 500	267	53%

Highlights

- Nifty slipped below the key 24,200 support on the weekly expiry, weakening the near-term technical setup.
- IT stocks remained under pressure, with Infosys, HCL Technologies and Wipro declining by more than 2% each. Axis Bank emerged as the top Nifty gainer and provided some relief to the benchmark.
- As the market approaches the monthly expiry, resistance levels in both Nifty and Bank Nifty have shifted lower, indicating weakening momentum and a cautious near-term outlook.



Oil and Natural Gas Corporation

ONGC has commissioned gas evacuation facilities at Khoraghat GGS-1 in Golaghat, Assam. The facility will enable surplus associated natural gas from the Upper Assam Shelf to be processed and evacuated through the North East Gas Grid (NEGG), developed by Indradhanush Gas Grid (IGGL). The development complements the commissioning of the Dergaon–Dimapur Pipeline, which has connected Nagaland to the North East Gas Grid and the National Gas Grid. The new connectivity will facilitate the utilisation of nearly 1 lakh Standard Cubic Metres (SCM) of gas per day from ONGC's Jorhat asset.

Hindustan Zinc

The company has increased the share of renewable power in its overall power consumption to 22 percent, up from approximately 18 percent in FY26, marking continued progress in its clean energy transition. The company is progressing towards meeting approximately 70 percent of its overall power requirements through renewable energy by FY28, as it scales up clean energy adoption across its mining and smelting operations.

Exide Industries

The company has invested Rs 200 crore in its wholly owned subsidiary, Exide Energy Solutions (EESL), through a rights issue. With this investment, the total investment made by the company in EESL stands at Rs 5,102.23 crore. There is no change in Exide Industries' shareholding percentage in EESL following the acquisition of the shares. The investment is part of the additional funding of up to Rs 1,400 crore approved by the board of Exide Industries for setting up a greenfield, multi-gigawatt lithium-ion cell manufacturing facility in India.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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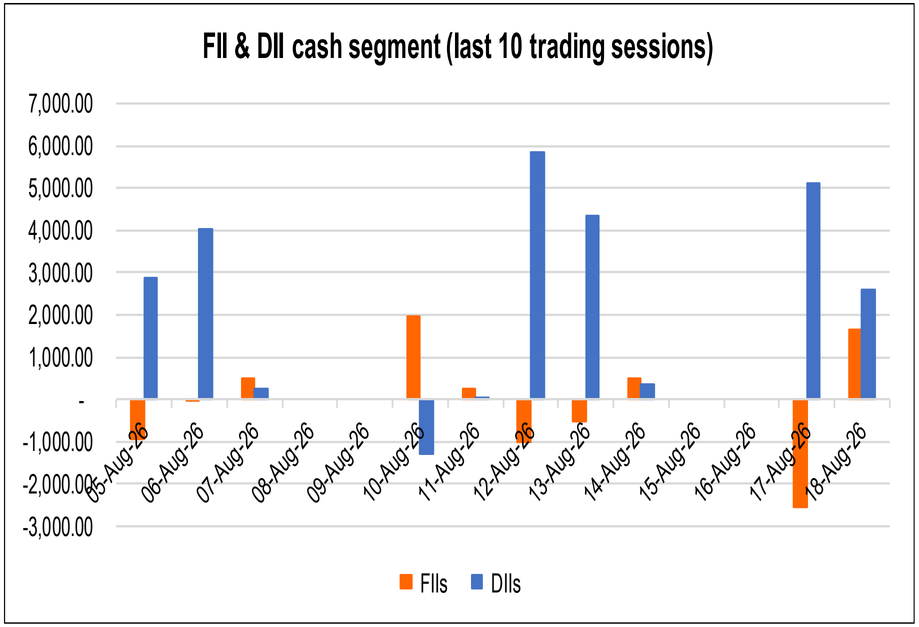
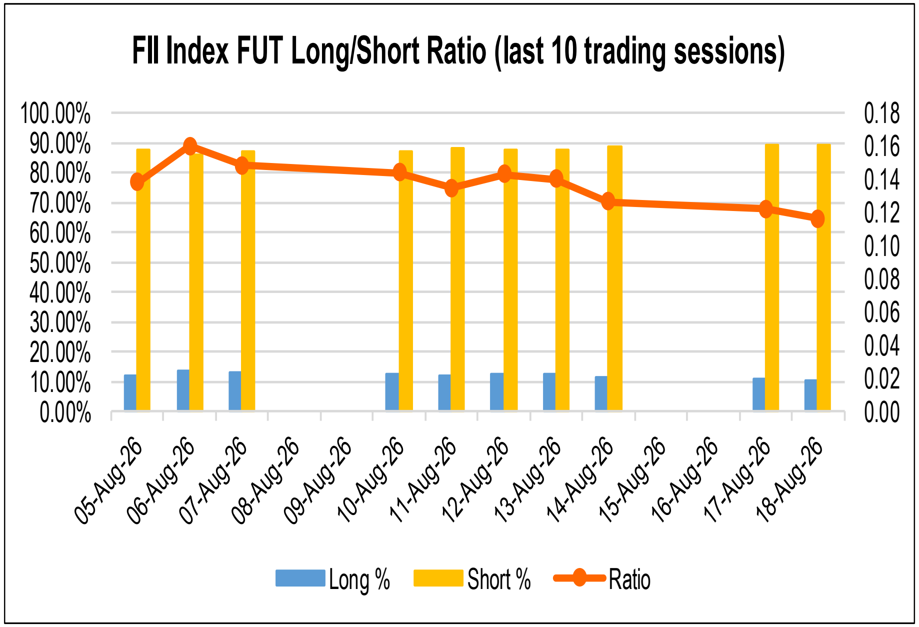
*INR in Crores

Cash Segment	18-Aug-2026	MTD	YTD
FII Net Flows	1,651.53	3,232.36	-3,48,290.46
DII Net Flows	2,579.31	24,733.77	5,29,970.18

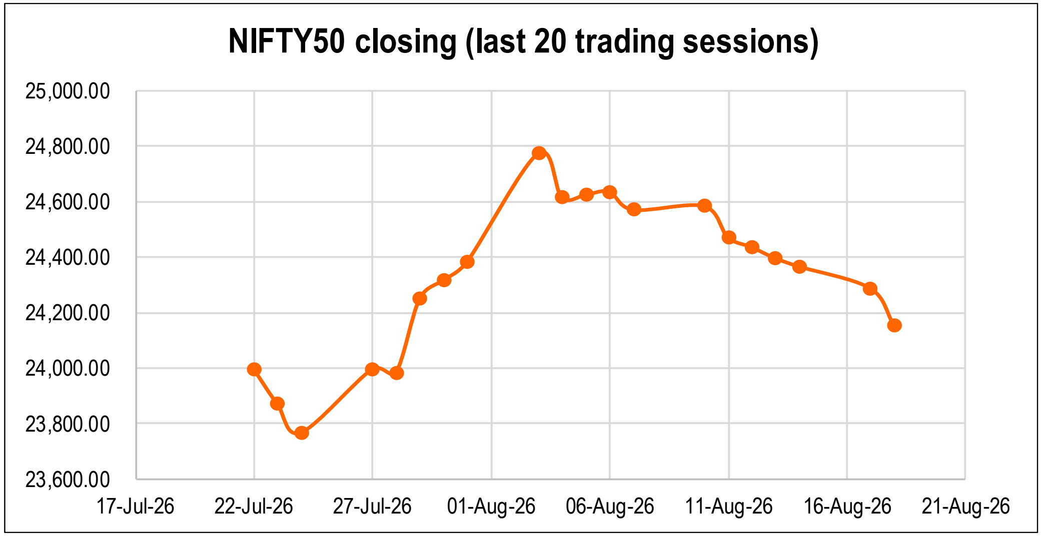
*INR in Crores

FIIs F&O Flows	18-Aug-2026	MTD
Index Futures	-2,029.03	-3,352.93
Index Options	-24,163.05	-41,285.58
Stock Futures	-1,753.00	-3,215.84
Stock Options	-1,141.29	-5,127.81

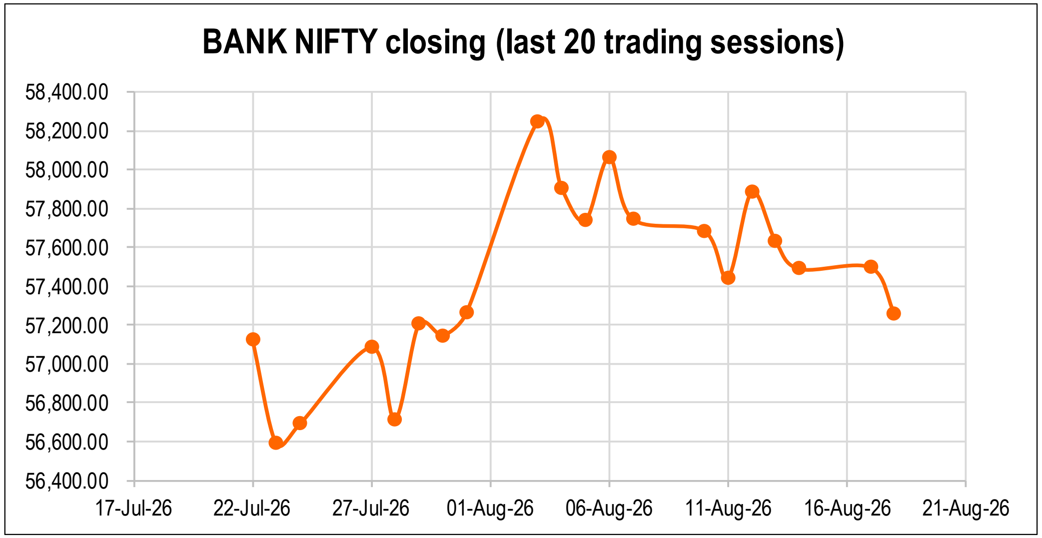




NIFTY	
Spot	24154.90
Futures	24230.10
Highest CE OI (25th AUG)	25000
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	0.81
Key Supply Zones	24700, 25000
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57262.40
Futures	57433.20
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	58000
PCR (25th AUG)	0.69
Key Supply Zones	57800, 58600
Key Demand Zones	57000, 56000



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Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty India Defence	9,968.25	1.29%	3.18%	6.45%	28.67%
Nifty Auto	29,264.55	0.30%	-0.34%	8.27%	3.81%
Nifty Healthcare	16,463.70	0.21%	-1.01%	-0.16%	12.46%
Nifty Oil & Gas	11,231.15	0.20%	-0.56%	-1.21%	-8.18%
Nifty Pharma	26,361.90	0.08%	-1.50%	1.38%	16.01%
Nifty Energy	38,578.85	-0.19%	-0.51%	-2.73%	9.21%
Nifty Private Bank	27,247.90	-0.23%	-0.59%	-2.20%	-5.13%
Nifty Consumer Durables	40,264.70	-0.40%	0.35%	1.47%	9.55%
Nifty Bank	57,262.40	-0.41%	-1.08%	-1.18%	-3.89%
Nifty Infrastructure	9,376.55	-0.42%	-0.35%	-0.70%	-2.49%
Nifty Financial Services	26,108.00	-0.42%	-1.21%	-1.76%	-5.45%
Nifty Metal	13,025.30	-0.61%	-1.11%	3.84%	16.63%
Nifty FMCG	47,734.80	-0.77%	-1.43%	-2.72%	-13.95%
Nifty PSU Bank	8,618.50	-1.01%	-2.26%	0.04%	1.00%
Nifty Realty	895.80	-1.42%	0.67%	-2.37%	2.03%
Nifty IT	30,213.45	-1.93%	-3.57%	3.61%	-20.25%

Sector View

Nifty FMCG Index has remained under sustained selling pressure over the past three months. The index has broken down from a contracting triangle pattern, with buyers failing to defend the 48,200 support zone. The breakdown signals further weakness, with the technical setup indicating a potential decline towards 45,500 in the coming sessions.

Stocks to watch

ABCAPITAL, LTF, MAXHEALTH, MCX.

Stocks in F&O ban list

BANDHANBNK, LICI, MANAPPURAM, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3002.50	-0.16	3026.06	3052.22	2468.49
ADANIPORTS	1682.40	-0.51	1711.67	1779.20	1589.11
APOLLOHOSP	8817.00	-0.10	8867.70	8750.80	7815.13
ASIANPAINT	2628.40	-2.20	2726.30	2709.09	2604.53
AXISBANK	1243.00	1.28	1236.59	1295.72	1286.74
BAJAJ_AUTO	11607.00	-0.48	11526.15	10658.52	9793.42
BAJAJFINSV	2011.20	0.31	1992.58	1881.41	1913.00
BAJFINANCE	1094.30	0.46	1089.67	1029.43	975.51
BEL	412.00	-0.11	400.45	408.31	419.70
BHARTIARTL	1934.20	-1.78	1946.43	1908.52	1949.64
CIPLA	1431.10	-0.03	1449.28	1432.07	1400.33
COALINDIA	406.90	-0.38	415.39	429.79	427.26
DRREDDY	1178.80	-1.11	1171.73	1242.30	1256.57
EICHERMOT	8018.50	-0.39	7916.50	7622.67	7306.65
ETERNAL	315.90	-0.66	307.89	285.25	273.44
GRASIM	3278.70	0.87	3206.32	3165.53	2903.98
HCLTECH	1298.00	-2.04	1332.05	1218.57	1406.03
HDFCBANK	723.00	-0.82	737.84	770.99	859.68
HDFCLIFE	538.25	-0.87	545.30	560.87	656.75
HINDALCO	1041.60	-0.79	1006.39	991.16	948.87
HINDUNILVR	2035.00	-0.97	2097.76	2135.85	2253.42
ICICIBANK	1412.00	-0.23	1433.97	1400.44	1351.66
INDIGO	5220.00	-1.05	5261.98	5175.29	4924.10
INFY	1115.00	-2.18	1138.83	1103.29	1336.83
ITC	270.00	-1.12	282.04	284.25	325.72

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	245.80	-1.58	250.08	243.09	260.50
JSWSTEEL	1267.60	-0.80	1276.90	1261.60	1215.99
KOTAKBANK	387.65	-1.29	390.51	391.29	401.36
LT	4064.30	-0.55	3972.37	3999.99	3977.73
M&M	3421.50	0.92	3362.72	3210.49	3357.93
MARUTI	13691.00	-0.50	13903.45	13784.46	14468.61
MAXHEALTH	1014.40	1.07	1067.80	1079.43	1051.51
NESTLEIND	1462.50	-0.51	1498.44	1453.56	1339.41
NTPC	337.10	0.03	344.25	349.66	357.22
ONGC	239.50	0.42	241.32	243.34	258.61
POWERGRID	268.00	0.70	278.15	282.89	285.11
RELIANCE	1322.00	0.46	1302.90	1303.11	1403.39
SBILIFE	1778.00	-0.69	1851.90	1816.78	1923.02
SBIN	1053.00	-0.77	1048.08	1037.72	1033.79
SHRIRAMFIN	1108.40	-1.21	1085.65	1042.86	971.31
SUNPHARMA	1875.10	-0.37	1949.15	1905.66	1788.69
TATACONSUM	1061.60	-1.03	1088.84	1098.24	1137.45
TATASTEEL	185.50	-0.27	187.03	189.92	192.02
TCS	2280.00	-1.44	2368.29	2227.76	2657.36
TECHM	1592.00	-1.12	1622.35	1523.30	1505.35
TITAN	5048.60	-0.39	4929.57	4624.76	4229.41
TMPV	322.80	-2.24	337.32	346.95	356.09
TRENT	2942.10	-0.13	2989.54	3010.18	2791.93
ULTRACEMCO	11499.00	-1.56	11896.00	11637.50	11793.68
WIPRO	178.06	-2.11	182.82	179.21	213.48

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