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DAILY TECHNICAL & DERIVATIVES REPORT

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	46,565.74	224.23	0.48%
S&P 500	6,575.32	46.80	0.72%
NASDAQ 100	24,019.99	279.80	1.18%
FTSE 100	10,364.79	188.34	1.85%
NIKKEI (8:00 AM)	52,727.00	-1,012.68	-1.88%
HANG SENG (8:00 AM)	25,043.50	-250.53	-0.99%
GOLD	4,695.67	-117.43	-2.44%
SILVER	71.99	-4.09	-5.37%
BRENT OIL	105.92	4.76	4.71%
DOLLAR INDEX	99.79	0.33	0.33%
USD/INR	93.23	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

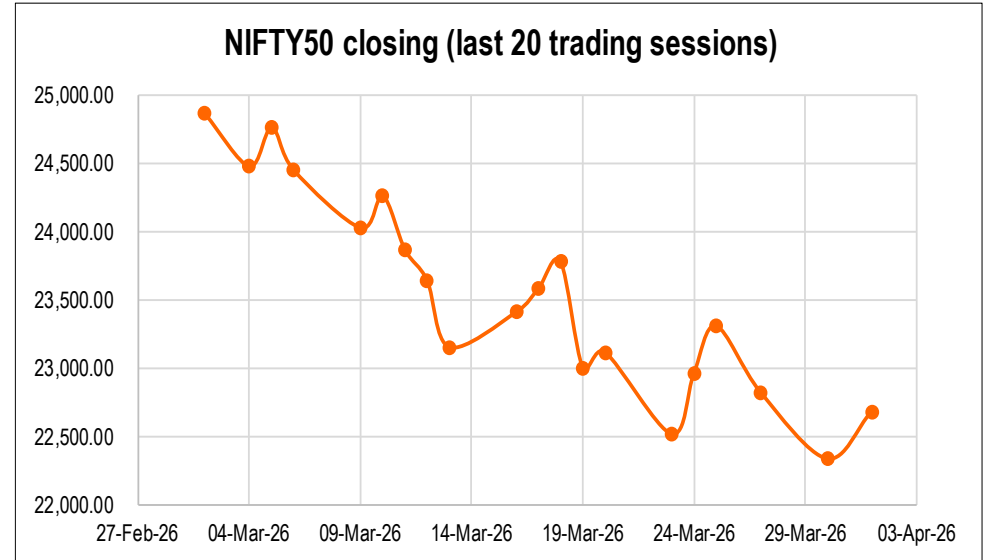
Global updates

- **U.S. equities** ended higher on Wednesday, led by gains in Alphabet and other heavyweights. **Asian equities** continued to decline after Trump signaled that the U.S. could intensify its stance against Iran over the next few weeks, reducing hopes of a quick resolution.
- **Oil** prices surged over \$4 on Thursday as the U.S. indicated continued attacks on Iran, including energy infrastructure, raising concerns over prolonged supply disruptions.
- **GIFT Nifty** trading at ~22,415.00 is indicating a negative start for the Indian market on Thursday.

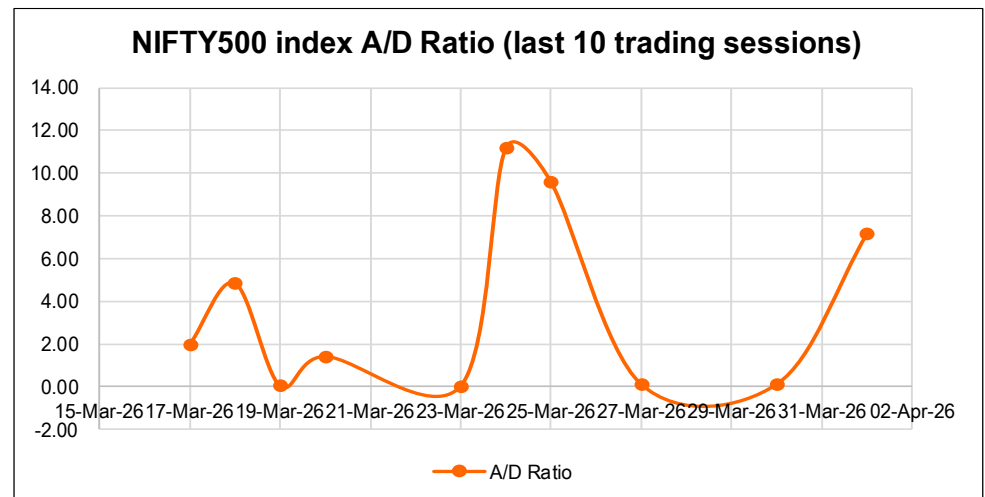


MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,679.40	348.00	1.56%
SENSEX	73,134.32	1,186.77	1.65%
BANK NIFTY	51,448.65	1,173.30	2.33%
FIN NIFTY	23,981.80	460.00	1.96%
MIDCAP NIFTY	12,460.05	301.30	2.48%
NIFTY SMLCAP 250	14,749.10	460.65	3.22%
INDIA VIX	24.87	-3.02	-10.82%



INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	40	10	0
NIFTY 500	438	61	1
NIFTY F&O	176	36	1



INDEX	SCRIPTS TRADING ABOVE 20 DSMA
NIFTY 50	6
NIFTY 500	135



InterGlobe Aviation

The company revised fuel charges on domestic and international routes for all new bookings, effective April 2. The domestic fuel surcharge has been revised to a range of Rs 275–Rs 950 based on distance slabs, while international routes have seen steeper hikes.

Hero MotoCorp

The company has completed the acquisition of 2,68,219 Series E cumulative compulsorily convertible preference shares in Euler Motors for Rs 210 crore. Following this acquisition, the company now holds a 36.67% stake.

Lupin

The company's subsidiary, Nanomi BV, Netherlands, has entered into definitive agreements to acquire a 43.38% stake in Multicare Pharmaceuticals Philippines, Inc. (MPPI), a subsidiary of Nanomi, for \$39.6 million. The transaction is expected to be completed by May 2026.

Glenmark Pharmaceuticals

Glenmark Pharmaceuticals Inc., USA, has announced that it will manage the end-to-end commercialization and distribution of Ryaltris (Olopatadine Hydrochloride and Mometasone Furoate) Nasal Spray, 665 mcg/25 mcg, in the United States, effective April 1. Ryaltris was launched in the United States in 2022 and is used for the treatment of symptoms associated with Seasonal Allergic Rhinitis (SAR) in adults and pediatric patients aged 12 years and above.

Varun Beverages

The Board has fixed April 8 as the record date for determining the eligibility of equity shareholders to receive a final dividend of Rs 0.50 per share for the financial year ended December 2025.



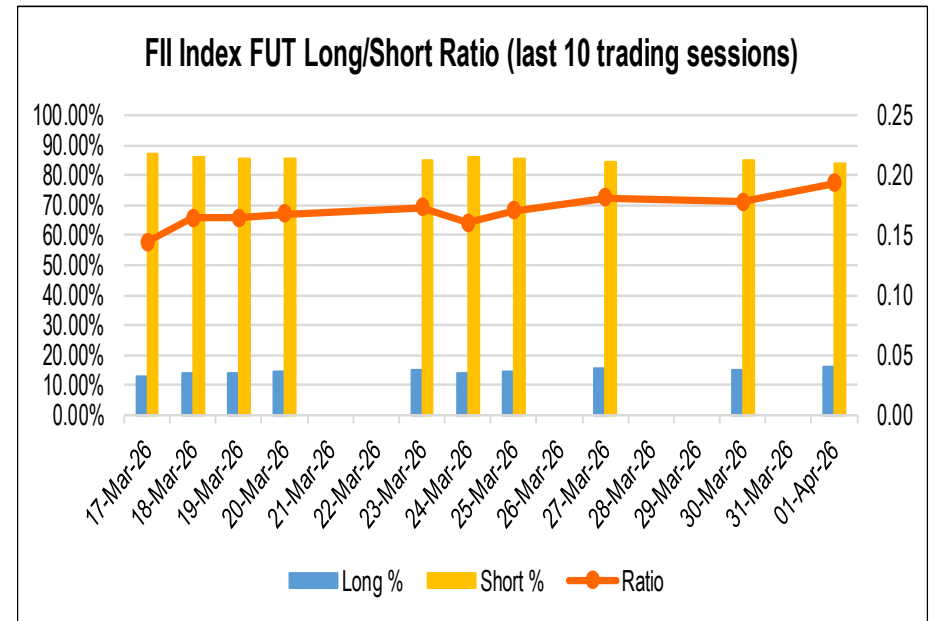
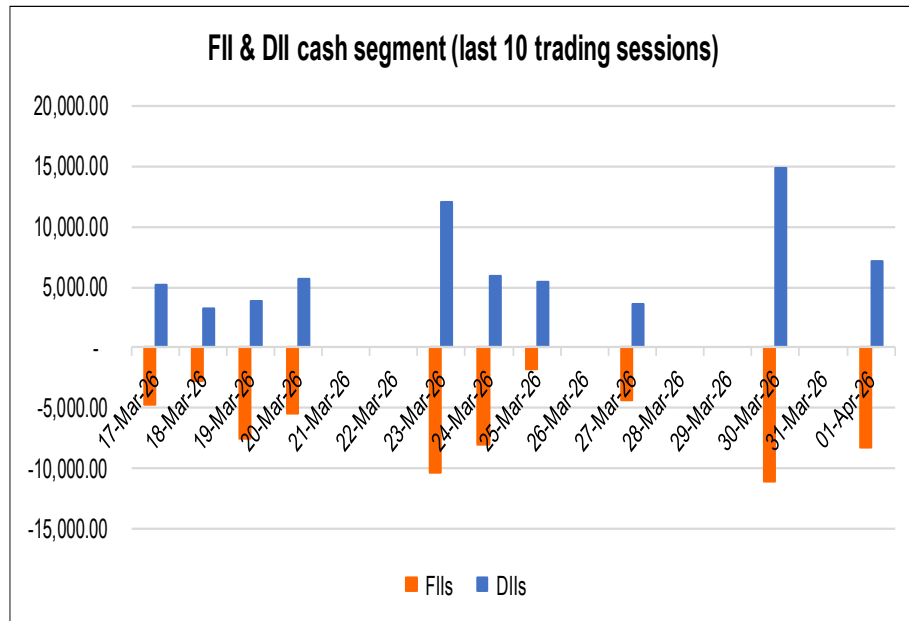
INSTITUTIONAL ACTIVITY

*INR in Crores

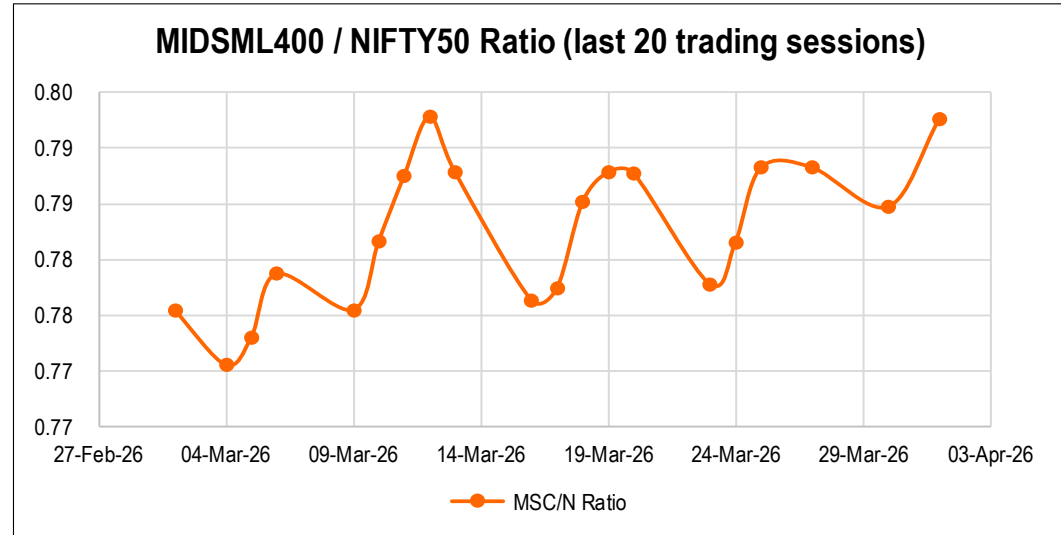
Cash Segment	1-4-2026	MTD	YTD
FII Net Flows	-8,331.15	-8,331.15	-1,78,947.56
DII Net Flows	7,171.80	7,171.80	2,57,776.02

*INR in Crores

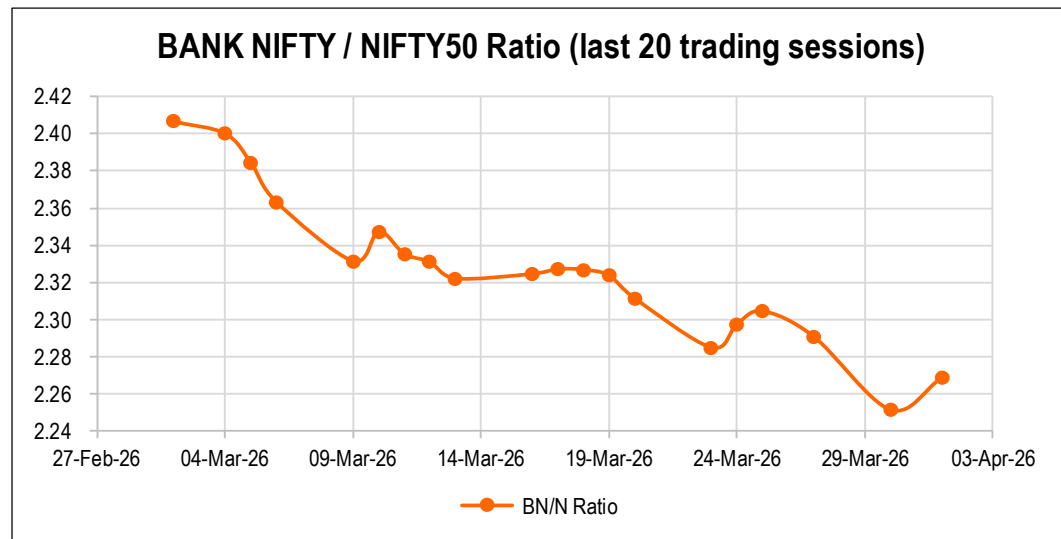
FII's F&O Flows	1-4-2026	MTD
Index Futures	-78.49	-78.49
Index Options	-4,459.99	-4,459.99
Stock Futures	3,199.31	3,199.31
Stock Options	-90.87	-90.87



NIFTY	
Spot	22679.40
Futures	22800.10
Highest CE OI (28 th APR)	23000
Highest PE OI (28 th APR)	23000
PCR (28 th APR)	0.98
Key Supply Zones	23000, 23600
Key Demand Zones	22400, 22000



BANK NIFTY	
Spot	51448.65
Futures	51784.60
Highest CE OI (28 th APR)	60000
Highest PE OI (28 th APR)	60000
PCR (28 th APR)	0.85
Key Supply Zones	52200, 52700
Key Demand Zones	50500, 50000





Index Trading View

- **Nifty** failed to capitalize on the gap-up opening, giving up more than 300 points from the day's high, but still managed to close with a gain of 348 points. The 23,000 level acted as a key hurdle, and going forward, a positive bias can only be considered if the index breaks and sustains above 23,000.
- **Bank Nifty** formed a Doji candlestick pattern on the daily chart, indicating indecision at current levels. A breakout above 52,200 on Thursday could revive optimism and offer long opportunities, with potential upside towards 52,700.

Stocks in Bullish Momentum

DMART, PREMIERENE, .

Stocks in Bearish Momentum

BLUESTAR, CIPLA.

Stocks in F&O ban list

Nil.



SECTORAL BREADTH

Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty PSU Bank	8,164.80	3.70%	-4.85%	-15.30%	-4.32%
Nifty Media	1,308.40	3.69%	-0.21%	-5.89%	-9.43%
Nifty Metal	11,412.05	2.46%	0.62%	-6.99%	2.19%
Nifty Bank	51,448.65	2.33%	-4.21%	-14.02%	-13.65%
Nifty Realty	665.00	2.13%	-3.92%	-13.42%	-24.26%
Nifty IT	29,669.05	2.09%	-0.01%	-1.99%	-21.68%
Nifty Auto	24,238.85	1.97%	-3.27%	-11.99%	-14.01%
Nifty Financial Services	23,981.80	1.96%	-4.29%	-13.00%	-13.15%
Nifty Consumer Durables	33,658.45	1.92%	-3.17%	-8.48%	-8.43%
Nifty Private Bank	24,569.80	1.76%	-3.64%	-13.36%	-14.45%
Nifty Energy	35,402.85	1.59%	-0.43%	-2.88%	0.22%
Nifty FMCG	46,135.95	1.31%	-2.43%	-9.09%	-16.84%
Nifty Oil & Gas	10,929.05	1.31%	-0.25%	-8.93%	-10.65%
Nifty Infrastructure	8,669.10	1.26%	-2.46%	-6.98%	-9.85%
Nifty Pharma	22,011.60	-0.99%	-2.95%	-4.12%	-3.13%
Nifty Healthcare	14,055.75	-1.02%	-3.20%	-5.40%	-3.99%

Sector Analysis

- Despite a significant gap-up opening on Wednesday, most sectoral indices barring Nifty PSU Bank and Nifty Media, failed to sustain above their respective opening levels. This reflects a lack of buying conviction and reinforces a sell-on-rise sentiment in the broader market.
- **Nifty PSU Bank** Index filled the gap near the 8,235 level and formed a Spinning Top candlestick pattern on the daily chart, further highlighting indecision and weak buyer confidence at current levels.
- Despite intermittent global support, elevated geopolitical tensions and rising crude may keep Indian markets volatile with a cautious bias on Thursday.
- Rising crude prices are negative for India, likely pressuring oil-sensitive sectors like OMCs, aviation, and paints while upstream companies such as **Oil and Natural Gas Corporation** and **Oil India Limited** may benefit from the same.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	1842.50	4.76	1952.50	2060.99	2284.30
ADANIPTS	1385.40	5.55	1390.73	1447.27	1432.97
APOLLOHOSP	7305.50	-1.53	7541.85	7379.77	7433.25
ASIANPAINT	2225.80	2.80	2230.87	2373.43	2514.62
AXISBANK	1193.10	2.74	1246.55	1305.00	1213.16
BAJAJ_AUTO	8895.50	1.30	9204.02	9477.42	8975.41
BAJAJFINSV	1647.00	0.93	1774.52	1911.79	1999.36
BAJFINANCE	817.30	1.96	881.11	937.02	963.54
BEL	418.70	4.51	436.14	435.04	410.41
BHARTIARTL	1781.90	-0.03	1833.55	1925.50	1975.17
CIPLA	1195.90	-2.31	1281.67	1316.41	1471.56
COALINDIA	449.40	-0.23	450.12	436.29	400.56
DRREDDY	1209.60	-3.61	1286.50	1262.96	1263.14
EICHERMOT	6825.50	3.64	7091.77	7339.97	6726.51
ETERNAL	236.52	3.29	231.96	257.84	290.72
GRASIM	2592.80	1.37	2654.87	2769.01	2785.66
HCLTECH	1354.40	0.95	1351.29	1482.32	1545.09
HDFCBANK	742.25	1.46	814.29	880.39	958.40
HDFCLIFE	572.95	-2.99	636.22	686.73	745.02
HINDALCO	904.60	2.28	914.90	930.73	805.42
HINDUNILVR	2064.70	0.46	2150.06	2282.17	2389.40
ICICIBANK	1212.70	0.56	1277.45	1342.63	1386.83
INDIGO	4180.80	6.02	4249.83	4615.97	5364.55
INFY	1275.70	2.01	1272.41	1409.76	1509.74
ITC	291.70	1.39	302.21	313.42	381.71

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	231.93	3.49	237.04	251.32	294.39
JSWSTEEL	1140.40	1.59	1171.29	1205.15	1128.11
KOTAKBANK	356.05	0.75	377.58	403.21	415.79
LT	3607.50	2.95	3666.34	3911.45	3811.83
M&M	3031.50	2.60	3126.24	3357.24	3434.44
MARUTI	12509.00	1.65	13115.25	14311.80	14741.04
MAXHEALTH	958.90	-0.35	1001.00	1019.59	1129.53
NESTLEIND	1180.80	0.51	1213.50	1266.06	1229.38
NTPC	364.65	-1.62	377.35	367.68	342.56
ONGC	288.05	1.19	272.15	267.95	248.51
POWERGRID	292.80	-1.11	297.75	288.32	283.34
RELIANCE	1369.20	1.88	1389.35	1406.41	1446.65
SBILIFE	1790.50	0.74	1901.87	1982.71	1917.00
SBIN	1017.80	3.92	1077.95	1106.16	938.96
SHRIRAMFIN	900.55	3.26	977.35	1012.39	801.26
SUNPHARMA	1728.50	-1.63	1781.19	1722.70	1696.26
TATACONSUM	1023.80	0.89	1072.45	1121.06	1125.02
TATASTEEL	194.60	1.43	194.19	197.52	175.21
TCS	2408.20	2.09	2450.06	2735.51	3052.42
TECHM	1404.50	1.48	1362.43	1502.53	1523.73
TITAN	4065.50	2.89	4098.92	4129.81	3788.17
TMPV	302.95	2.28	324.87	350.14	384.49
TRENT	3526.50	7.00	3575.43	3818.73	4630.70
ULTRACEMCO	10714.00	-0.29	11257.50	12140.82	12108.82
WIPRO	191.18	1.89	194.15	213.14	243.31

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