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DAILY TECHNICAL & DERIVATIVES REPORT

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| GLOBAL SCRIPS | LTP | CHANGE | % CHG |
|---------------------|-----------|---------|--------|
| DJIA | 49,395.16 | -267.50 | -0.54% |
| S&P 500 | 6,861.89 | -19.42 | -0.28% |
| NASDAQ 100 | 24,797.34 | -101.53 | -0.41% |
| FTSE 100 | 10,627.04 | -59.14 | -0.55% |
| NIKKEI 22 (8:00 AM) | 56,746.00 | -721.83 | -1.26% |
| HANG SENG (8:00 AM) | 26,440.00 | -265.94 | -1.00% |
| GOLD | 5,017.44 | 20.04 | 0.40% |
| SILVER | 78.15 | 0.51 | 0.66% |
| BRENT OIL | 71.94 | 0.03 | 0.04% |
| DOLLAR INDEX | 97.92 | 0.19 | 0.19% |
| USD/INR | 91.03 | 0.01 | 0.01% |

Global updates

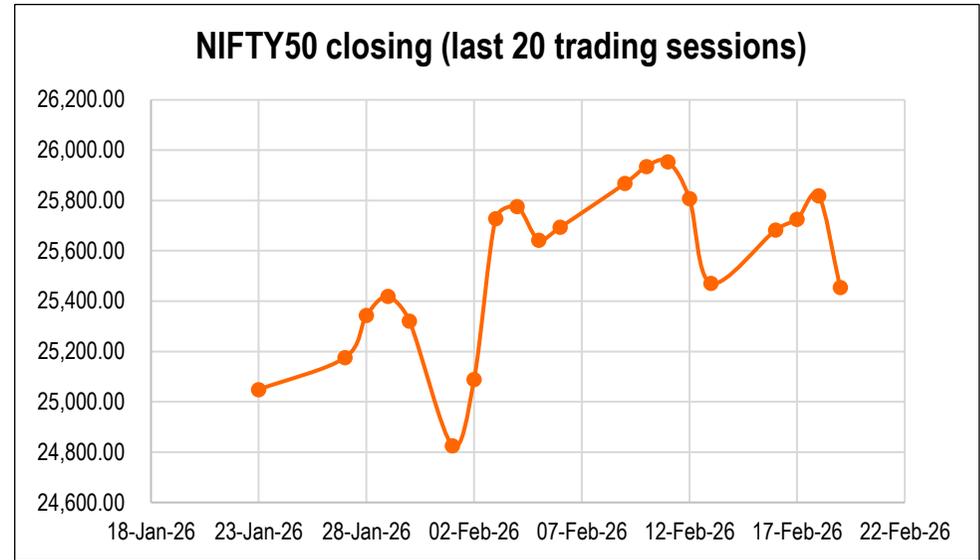
- US equities closed lower on Thursday, pressured by declines in private equity firms and weakness in Walmart and Apple.
- Early on Friday, Asian equities traded lower as escalating geopolitical tensions involving Iran dampened investor sentiment and triggered cautious positioning.
- Oil prices climbed to their highest level since August 2025, driven by rising concerns over potential military escalation in Iran, adding a geopolitical risk premium to energy markets.
- **GIFT Nifty** trading at ~25,429.00 is indicating a muted start for the Indian market on Friday.

*Closed

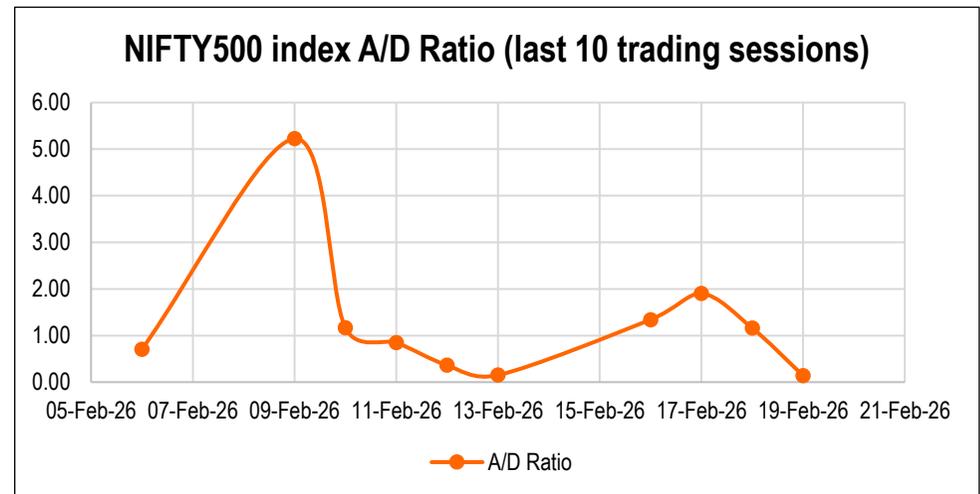


MARKET SNAPSHOT

| INDIAN INDICES | LTP | CHANGE | % CHG |
|-------------------------|-----------|-----------|--------|
| NIFTY 50 | 25,454.35 | -365.00 | -1.41% |
| SENSEX | 82,325.93 | -1,408.32 | -1.68% |
| BANK NIFTY | 60,739.55 | -811.25 | -1.32% |
| FIN NIFTY | 28,069.50 | -393.75 | -1.38% |
| MIDCAP NIFTY | 13,442.50 | -287.05 | -2.09% |
| NIFTY SMLCAP 250 | 15,988.00 | -192.85 | -1.19% |
| INDIA VIX | 13.65 | 1.43 | 11.70% |



| INDEX | ADVANCE | DECLINE | UNCHANGED |
|----------------------|---------|---------|-----------|
| NIFTY 50 | 3 | 48 | 0 |
| NIFTY 500 | 62 | 439 | 0 |
| NIFTY F&O | 15 | 192 | 0 |



| INDEX | SCRIPTS TRADING ABOVE 20 DSMA |
|------------------|-------------------------------|
| NIFTY 50 | 28 |
| NIFTY 500 | 263 |



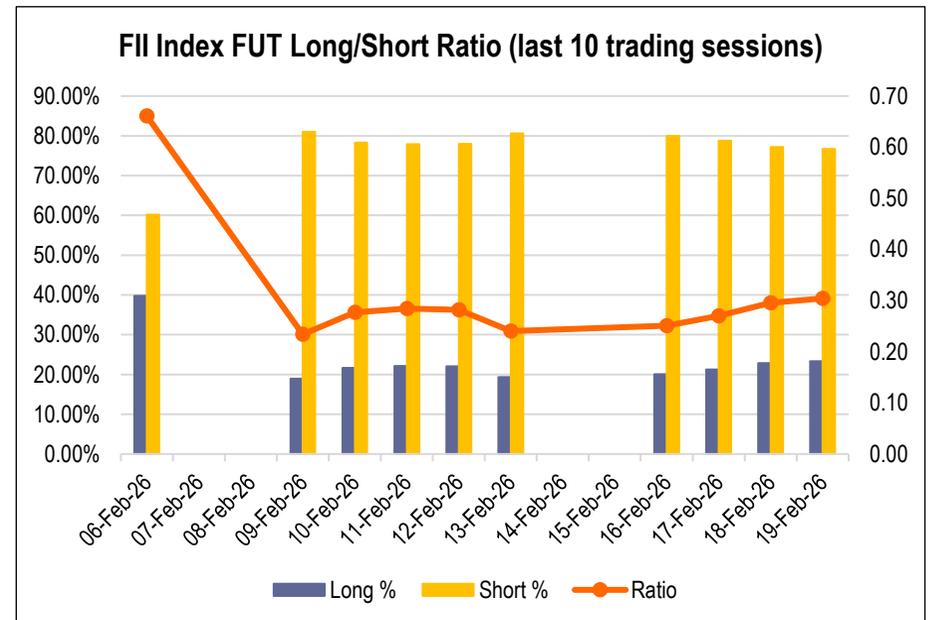
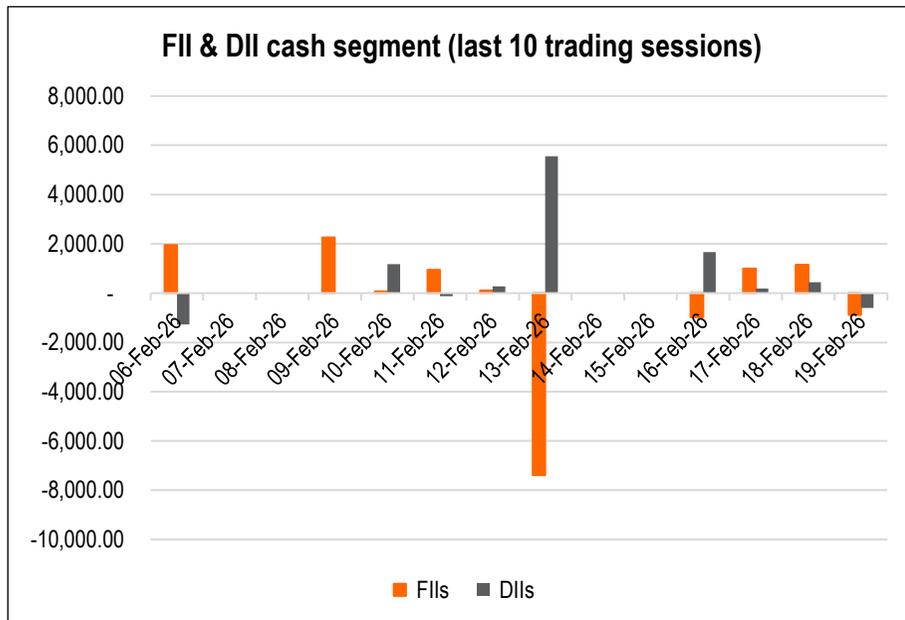
INSTITUTIONAL ACTIVITY

*INR in Crores

| Cash Segment | 19-2-2026 | MTD | YTD |
|----------------------|-----------|-----------|------------|
| FII Net Flows | -880.49 | -1,076.63 | -42,511.85 |
| DII Net Flows | -596.28 | 11,474.03 | 80,694.77 |

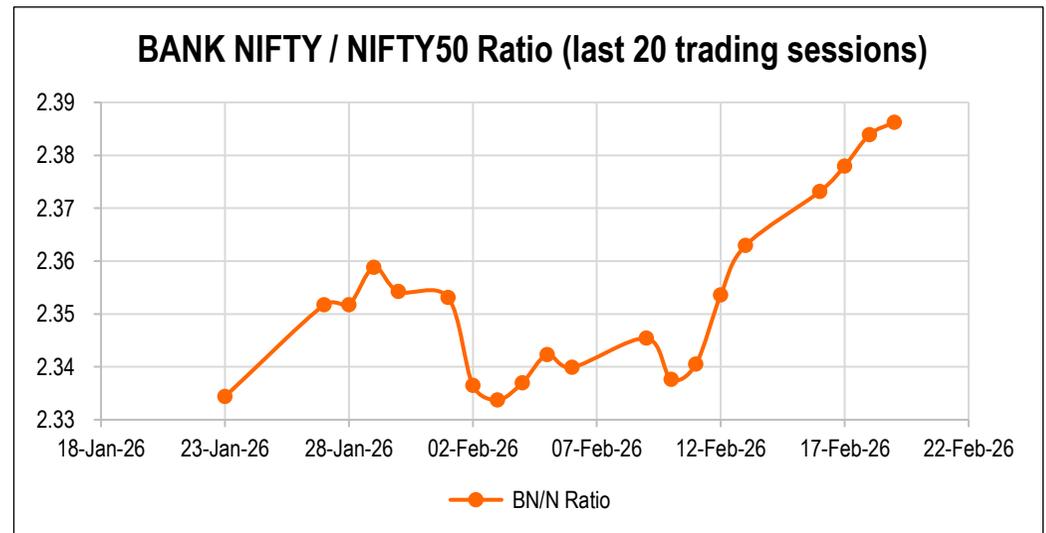
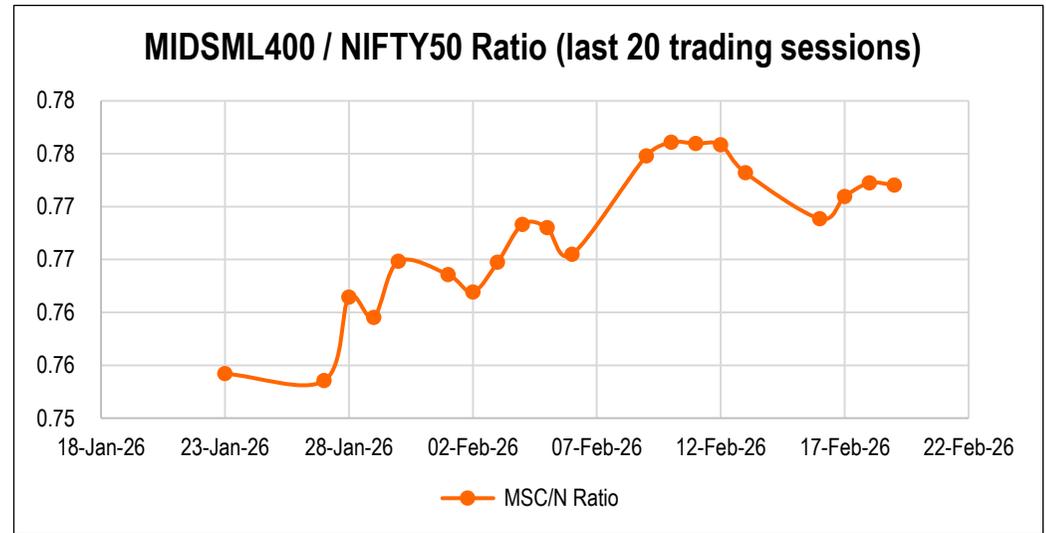
*INR in Crores

| FII's F&O Flows | 19-2-2026 | MTD |
|-----------------|-----------|------------|
| Index Futures | -586.69 | 9,653.68 |
| Index Options | 3,681.88 | -38,300.83 |
| Stock Futures | -2,030.29 | -9,150.3 |
| Stock Options | 1,071.94 | -2,925.06 |



| NIFTY | |
|--------------------------------------|---------------------|
| Spot | 25454.35 |
| Futures | 25410.00 |
| Highest CE OI (24 th FEB) | 27000 |
| Highest PE OI (24 th FEB) | 25000 |
| PCR (24 th FEB) | 0.57 |
| Key Supply Zones | 25650, 26000 |
| Key Demand Zones | 25350, 25100 |

| BANK NIFTY | |
|--------------------------------------|---------------------|
| Spot | 60739.55 |
| Futures | 60640.00 |
| Highest CE OI (24 th FEB) | 61000 |
| Highest PE OI (24 th FEB) | 60000 |
| PCR (24 th FEB) | 0.88 |
| Key Supply Zones | 61000, 61650 |
| Key Demand Zones | 60300, 59800 |





Index Trading Strategy

- **Nifty:** A close below 25500 on Thursday has triggered put unwinding, increasing the probability of further downside towards 25100 in the next 1-2 sessions. Resistance is placed at 25650, making a sell-on-rise strategy preferable for Friday.
- **Bank Nifty:** The index has formed a bearish engulfing pattern, indicating strong seller dominance. Any rejection near 61000 can be used as a shorting opportunity, while 60300 may act as an intraday support and profit-booking zone.

Stocks in Bullish Momentum

ONGC, SBICARD.

Stocks in Bearish Momentum

HINDPETRO, DLF.

Stocks in F&O ban list

SAIL, SAMMAANCAP.

| Index | LTP | 1 Day | 1 Week | 1 Month | YTD |
|--------------------------|-----------|--------|--------|---------|---------|
| Nifty Pharma | 22,429.10 | -0.50% | 0.19% | 3.29% | -1.30% |
| Nifty Healthcare | 14,521.20 | -0.51% | 0.10% | 3.77% | -0.81% |
| Nifty Oil & Gas | 12,036.15 | -1.02% | -1.39% | 5.84% | -1.59% |
| Nifty IT | 32,319.40 | -1.07% | -2.54% | -15.17% | -14.69% |
| Nifty Energy | 36,088.00 | -1.18% | -1.00% | 8.18% | 2.16% |
| Nifty Metal | 11,842.40 | -1.20% | -3.56% | 4.11% | 6.04% |
| Nifty PSU Bank | 9,505.95 | -1.24% | 3.00% | 7.18% | 11.40% |
| Nifty Bank | 60,739.55 | -1.32% | 0.00% | 2.25% | 1.94% |
| Nifty Financial Services | 28,069.50 | -1.38% | -1.11% | 3.19% | 1.65% |
| Nifty Private Bank | 28,760.45 | -1.46% | -0.78% | 1.25% | 0.14% |
| Nifty FMCG | 51,483.60 | -1.76% | -0.78% | -0.44% | -7.20% |
| Nifty Infrastructure | 9,559.05 | -1.79% | -1.08% | 6.17% | -0.60% |
| Nifty Consumer Durables | 37,459.10 | -1.93% | -1.71% | 6.03% | 1.91% |
| Nifty Auto | 27,734.00 | -2.10% | -2.70% | 2.92% | -1.62% |
| Nifty Media | 1,430.75 | -2.23% | -2.94% | 5.17% | -0.97% |
| Nifty Realty | 817.85 | -2.56% | -2.91% | 3.02% | -6.85% |

Sector Analysis

- Crude at multi-month highs is marginally negative for India, as elevated oil prices may pressure OMCs like **IOC, BPCL & HINDPETRO** due to margin concerns, while benefiting upstream players such as **ONGC** and **Oil India Limited**. Higher crude may also increase input and fuel costs for aviation and paint companies, weighing on their margins.
- **Nifty PSU Bank:** After a strong bull run, the index formed a 'bearish engulfing' pattern on Thursday, signaling potential exhaustion at higher levels. The setup suggests a short-term correction of 3-5% in the coming sessions, with 9,000-9,100 likely to act as a key support zone.
- **Nifty Consumer Durables:** A 'hanging man' formation has appeared on the daily chart near the resistance zone of 38,450, indicating possible supply at higher levels. A running correction of 3-5% may unfold, with 36,500 expected to provide immediate support.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

| Symbol | LTP | %Change | 20 DSMA | 50 DSMA | 200 DSMA |
|------------|---------|---------|---------|---------|----------|
| ADANIENT | 2156.70 | -2.46 | 2127.33 | 2176.75 | 2337.68 |
| ADANIPTS | 1513.30 | -2.42 | 1488.12 | 1474.74 | 1430.67 |
| APOLLOHOSP | 7592.50 | -0.72 | 7203.70 | 7145.27 | 7349.03 |
| ASIANPAINT | 2400.80 | -1.29 | 2440.07 | 2645.45 | 2517.16 |
| AXISBANK | 1356.60 | -1.48 | 1340.67 | 1295.71 | 1202.25 |
| BAJAJ_AUTO | 9729.00 | -2.52 | 9645.55 | 9429.19 | 8861.00 |
| BAJAJFINSV | 2033.20 | -1.33 | 1996.60 | 2014.17 | 2022.53 |
| BAJFINANCE | 1017.05 | -0.66 | 966.61 | 975.79 | 963.80 |
| BEL | 435.35 | -2.76 | 436.89 | 416.10 | 401.50 |
| BHARTIARTL | 1988.60 | -1.64 | 1998.08 | 2042.80 | 1974.17 |
| CIPLA | 1328.90 | -1.55 | 1331.48 | 1417.96 | 1496.71 |
| COALINDIA | 416.15 | -0.44 | 427.30 | 415.42 | 394.39 |
| DRREDDY | 1282.30 | 0.16 | 1245.47 | 1243.23 | 1256.88 |
| EICHERMOT | 7897.00 | -1.40 | 7418.22 | 7345.08 | 6478.64 |
| ETERNAL | 271.75 | -2.02 | 280.41 | 282.98 | 290.89 |
| GRASIM | 2864.30 | -2.37 | 2860.47 | 2829.32 | 2780.04 |
| HCLTECH | 1450.40 | -1.15 | 1597.89 | 1635.24 | 1581.74 |
| HDFCBANK | 915.60 | -0.98 | 929.79 | 953.41 | 975.63 |
| HDFCLIFE | 733.15 | 0.49 | 715.17 | 738.60 | 757.74 |
| HINDALCO | 905.65 | 0.71 | 945.45 | 913.75 | 770.18 |
| HINDUNILVR | 2279.30 | -1.90 | 2372.06 | 2349.27 | 2406.74 |
| ICICIBANK | 1388.80 | -1.38 | 1388.42 | 1379.92 | 1404.66 |
| INDIGO | 4815.10 | -3.32 | 4851.43 | 4918.54 | 5500.10 |
| INFY | 1370.50 | -0.23 | 1527.33 | 1589.03 | 1547.10 |
| ITC | 326.00 | -1.94 | 319.50 | 350.00 | 397.43 |

| Symbol | LTP | %Change | 20 DSMA | 50 DSMA | 200 DSMA |
|------------|----------|---------|----------|----------|----------|
| JIOFIN | 258.60 | -2.08 | 260.91 | 278.93 | 299.37 |
| JSWSTEEL | 1228.40 | -1.82 | 1228.88 | 1174.84 | 1102.87 |
| KOTAKBANK | 416.40 | -2.33 | 418.32 | 425.76 | 419.73 |
| LT | 4280.50 | -1.05 | 4054.19 | 4031.14 | 3783.12 |
| M&M | 3431.80 | -2.80 | 3516.46 | 3601.63 | 3416.44 |
| MARUTI | 14903.00 | -1.72 | 14979.00 | 15867.92 | 14602.87 |
| MAXHEALTH | 1081.45 | -0.44 | 1020.11 | 1036.77 | 1147.32 |
| NESTLEIND | 1278.50 | -1.72 | 1298.54 | 1286.05 | 1224.51 |
| NTPC | 363.20 | -1.41 | 359.71 | 343.83 | 337.48 |
| ONGC | 274.65 | 3.80 | 265.82 | 249.08 | 244.48 |
| POWERGRID | 294.65 | -1.96 | 280.89 | 269.74 | 283.14 |
| RELIANCE | 1409.50 | -2.21 | 1422.17 | 1478.49 | 1450.75 |
| SBILIFE | 2043.00 | -0.81 | 2021.59 | 2035.36 | 1895.30 |
| SBIN | 1205.70 | -1.08 | 1115.94 | 1042.98 | 898.61 |
| SHRIRAMFIN | 1054.70 | -2.00 | 1031.38 | 983.49 | 756.54 |
| SUNPHARMA | 1713.40 | -0.64 | 1674.98 | 1709.38 | 1687.17 |
| TATACONSUM | 1160.50 | -0.79 | 1146.08 | 1165.47 | 1129.43 |
| TATASTEEL | 205.41 | -1.73 | 198.92 | 186.08 | 169.82 |
| TCS | 2677.90 | -0.63 | 2969.23 | 3124.87 | 3180.84 |
| TECHM | 1479.30 | -1.69 | 1639.10 | 1623.93 | 1550.68 |
| TITAN | 4198.20 | -1.19 | 4119.80 | 4070.26 | 3710.42 |
| TMPV | 375.70 | -1.87 | 367.49 | 359.64 | 396.71 |
| TRENT | 4067.90 | -2.85 | 4016.17 | 4057.43 | 4872.96 |
| ULTRACEMCO | 12688.00 | -2.79 | 12779.15 | 12238.12 | 12090.56 |
| WIPRO | 211.21 | -0.35 | 229.41 | 248.54 | 250.27 |

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