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DAILY TECHNICAL & DERIVATIVES REPORT

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20th August, 2026

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,463.05	119.65	0.22%
S&P 500	7,707.98	16.22	0.21%
NASDAQ 100	29,426.02	-64.93	-0.22%
FTSE 100	10,743.35	15.31	0.14%
NIKKIE (8:00 AM)	65,994.00	667.58	1.02%
HANG SENG (8:00 AM)	25,660.00	164.93	0.65%
GOLD	4,550.14	4.84	0.11%
SILVER	67.15	1.33	2.01%
BRENT OIL	91.90	0.28	0.31%
DOLLAR INDEX	98.75	0.02	0.02%
USD/INR	95.63	-0.12	-0.12%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street** ended higher on Wednesday, with the S&P 500 snapping a three-session losing streak as U.S. Treasury yields declined, easing pressure on equities and particularly high-valuation technology stocks. **Asian equities** and bonds advanced on Thursday after reports that the U.S. Treasury plans to buy back longer-dated Treasuries to help lower borrowing costs, improving investor sentiment.

- **Gold** remained near a more than two-month high as lower Treasury yields and a weaker U.S. Dollar increased the appeal of the precious metal. The **U.S. Dollar Index** also remained near three-month lows after the Treasury's measures helped ease concerns in the bond market, where long-term yields had reached their highest levels since 2007.

- **GIFT Nifty** trading at ~24,235.00 is indicating a positive start for the Indian market on Thursday.

MARKET SNAPSHOT

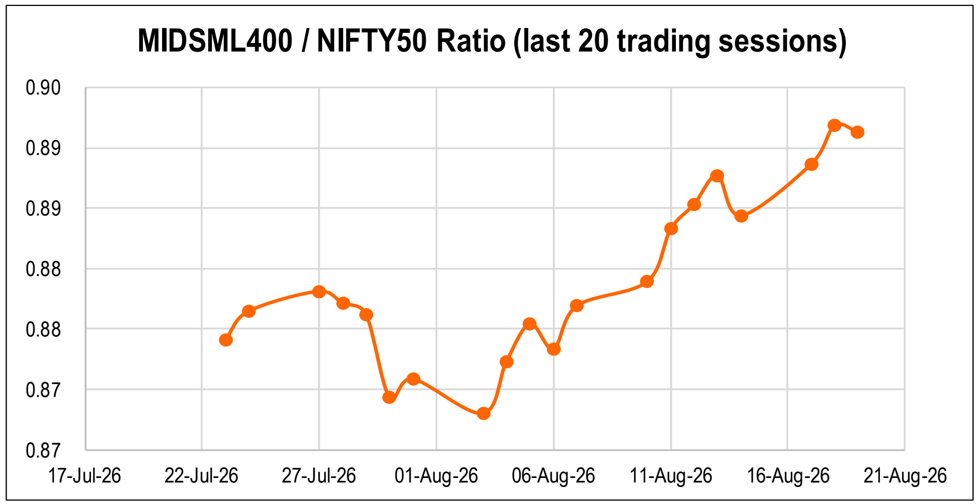
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,078.30	-76.60	-0.32%
SENSEX	76,909.68	-325.78	-0.42%
BANK NIFTY	57,239.75	-22.65	-0.04%
FIN NIFTY	26,013.00	-95.00	-0.36%
MIDCAP NIFTY	14,867.90	27.15	0.18%
NIFTY SMLCAP 250	18,232.00	-114.75	-0.63%
INDIA VIX	11.30	-0.09	-0.79%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	16	34	0
NIFTY 500	151	347	2
NIFTY F&O	69	137	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	23	46%
NIFTY 500	249	50%

Highlights

- Nifty continued its decline and filled the gap around 24,041, keeping the near-term setup under pressure.
- IT stocks attempted a recovery after recent profit booking, while FMCG stocks remained weak. ITC declined for the third consecutive session, adding to the pressure in the FMCG segment.
- The shift in Call writing from 25,000 to 24,000 strike in Nifty, points towards weakening sentiment and a lower resistance zone ahead of the 25th August monthly expiry.



HDFC Life Insurance Company

The Insurance Regulatory and Development Authority of India (IRDAI) has approved the reappointment of Vibha Padalkar as Managing Director and Chief Executive Officer of HDFC Life for a further term of five years, effective September 12, 2026. IRDAI has also approved the reappointment of Niraj Shah as Executive Director and Chief Financial Officer for a further term of five years, effective April 26, 2026.

Dr Lal PathLabs

Dr Lal PathLabs FZCO, Dubai, United Arab Emirates, a wholly owned subsidiary of the company, incorporated a company in Tashkent, Uzbekistan, named Dr Lal PathLabs Indomed LLC on August 19 and has agreed to subscribe to 70% of its share capital.

United Spirits

The Food Safety and Standards Authority of India (FSSAI) has revoked its order dated June 29, 2026, in relation to the sale of one of the products manufactured at the company's Baramati unit.

Hyundai Motor India

Hyundai Motor India has planned to increase the prices of its vehicles by up to 1% across its portfolio, effective September 2026. The quantum of the increase will vary depending on the model and variant. The price revision has been necessitated by a combination of rising input and commodity costs, higher operating expenses and continuing geopolitical and macroeconomic uncertainties, among other factors.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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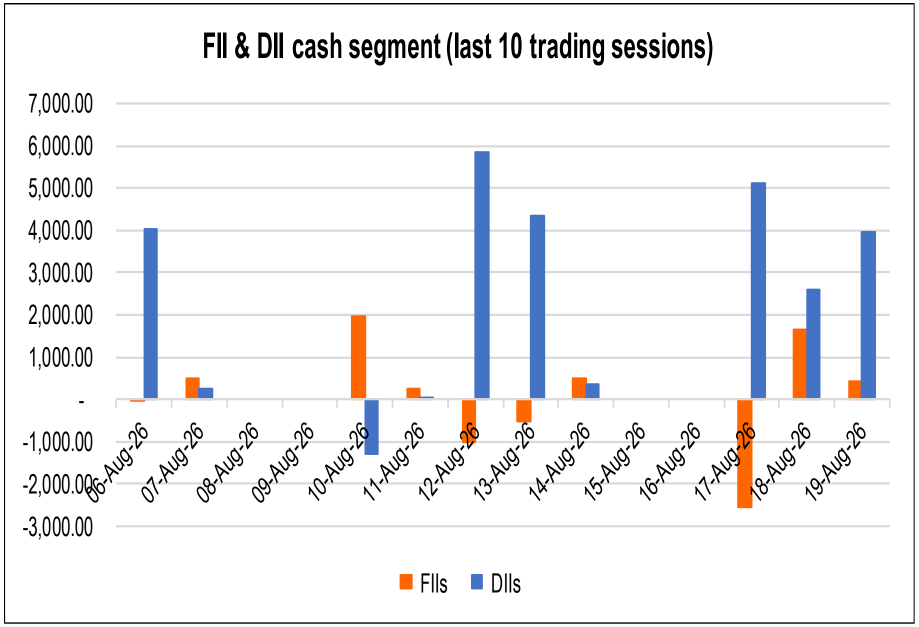
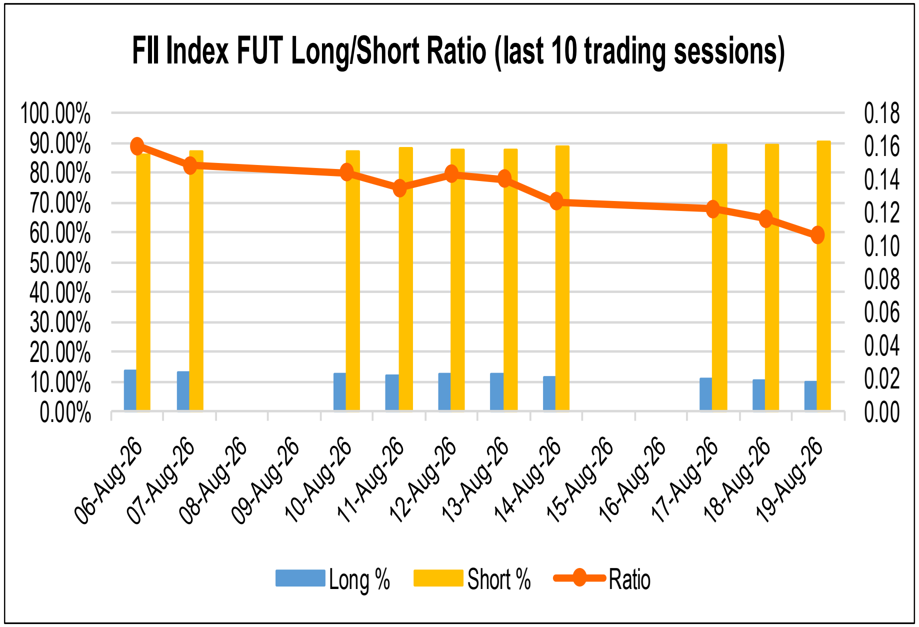
*INR in Crores

Cash Segment	19-Aug-2026	MTD	YTD
FII Net Flows	407.99	3,640.35	-3,47,882.47
DII Net Flows	3,973.72	28,707.49	5,33,943.90

*INR in Crores

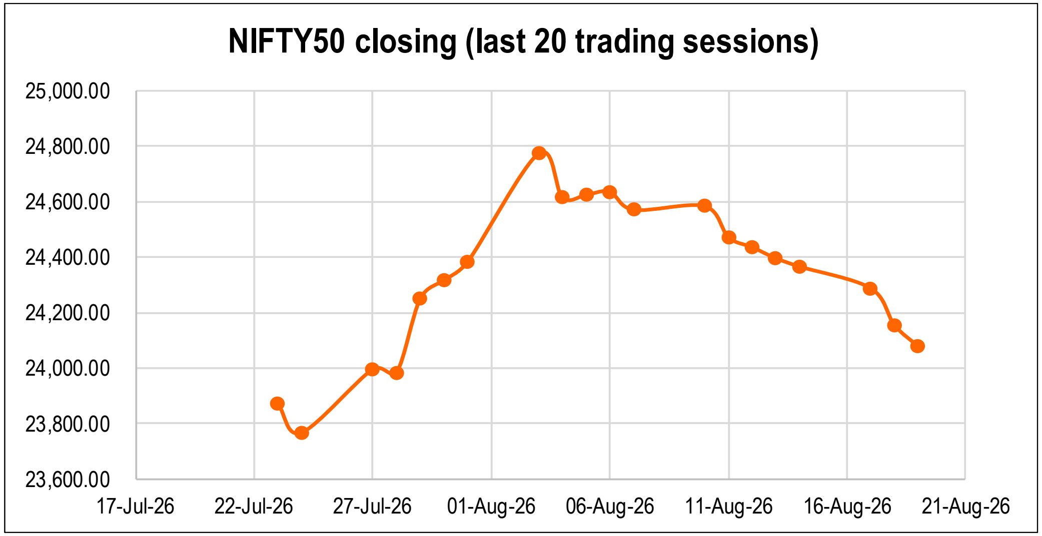
FIIs F&O Flows	19-Aug-2026	MTD
Index Futures	-2,492.77	-5,845.70
Index Options	-19,126.13	-60,411.71
Stock Futures	447.42	-2,768.42
Stock Options	-1,097.32	-6,225.13



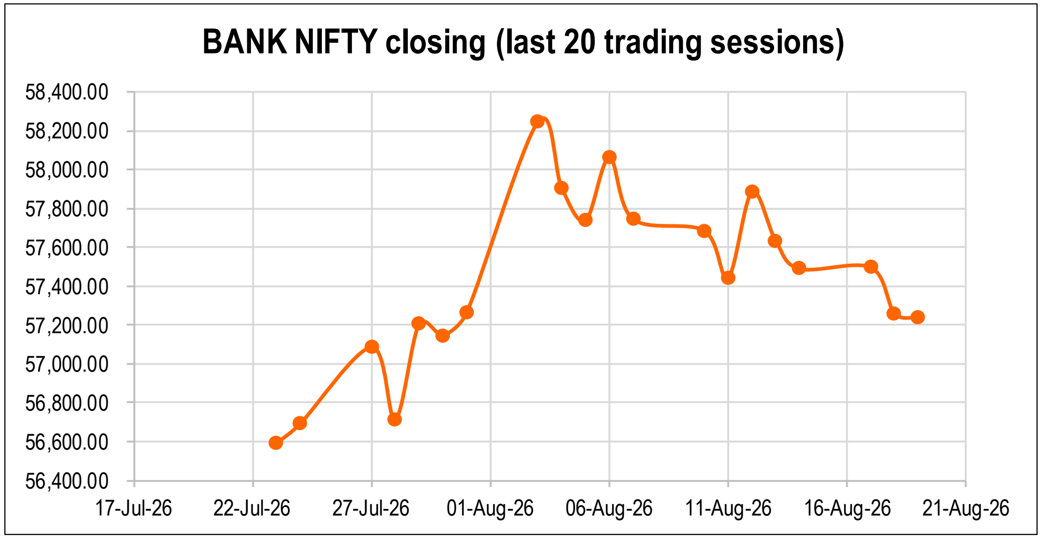


INDEX VIEW

NIFTY	
Spot	24078.30
Futures	24117.60
Highest CE OI (25th AUG)	24500
Highest PE OI (25th AUG)	24000
PCR (25th AUG)	0.70
Key Supply Zones	24200, 24700
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57239.75
Futures	57349.80
Highest CE OI (25th AUG)	58000
Highest PE OI (25th AUG)	57000
PCR (25th AUG)	0.70
Key Supply Zones	57400, 57800
Key Demand Zones	57000, 56000



Index	LTP	1 Day	1 Week	1 Month	YTD
Nifty IT	30,433.05	0.73%	-3.25%	5.00%	-19.67%
Nifty Consumer Durables	40,276.55	0.03%	-0.07%	1.89%	9.58%
Nifty PSU Bank	8,617.65	-0.01%	-1.95%	0.92%	0.99%
Nifty Metal	13,023.25	-0.02%	-0.08%	3.17%	16.62%
Nifty Bank	57,239.75	-0.04%	-0.69%	-1.03%	-3.93%
Nifty Realty	895.35	-0.05%	-0.34%	-3.45%	1.98%
Nifty Private Bank	27,207.70	-0.15%	-0.19%	-2.42%	-5.27%
Nifty Pharma	26,313.80	-0.18%	-1.40%	0.85%	15.80%
Nifty Auto	29,185.40	-0.27%	-0.70%	6.98%	3.53%
Nifty Healthcare	16,412.80	-0.31%	-1.02%	-0.81%	12.11%
Nifty Financial Services	26,013.00	-0.36%	-1.20%	-1.95%	-5.80%
Nifty Oil & Gas	11,176.90	-0.48%	-0.67%	-1.19%	-8.62%
Nifty FMCG	47,473.90	-0.55%	-2.79%	-2.95%	-14.42%
Nifty Infrastructure	9,305.55	-0.76%	-0.93%	-1.53%	-3.23%
Nifty Energy	38,124.45	-1.18%	-1.46%	-3.70%	7.92%
Nifty India Defence	9,819.45	-1.49%	0.09%	4.07%	26.75%

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

DIXON, HDFCAMC, NAMINDIA, PNBHOUSING.

Stocks in F&O ban list

BANDHANBNK, MANAPPURAM, SAIL.

KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2990.30	-0.41	3018.19	3052.43	2471.34
ADANIPORTS	1681.90	-0.03	1704.80	1776.31	1590.43
APOLLOHOSP	8750.00	-0.76	8858.30	8755.32	7819.47
ASIANPAINT	2630.80	0.09	2723.20	2707.54	2605.13
AXISBANK	1235.00	-0.64	1236.42	1294.57	1286.68
BAJAJ_AUTO	11645.00	0.33	11558.47	10687.74	9806.36
BAJAJFINSV	2012.00	0.04	1999.36	1887.79	1912.36
BAJFINANCE	1080.20	-1.29	1090.66	1033.30	975.55
BEL	409.20	-0.68	400.57	408.26	419.68
BHARTIARTL	1922.00	-0.63	1945.08	1910.98	1948.79
CIPLA	1422.00	-0.64	1449.63	1432.98	1399.60
COALINDIA	400.00	-1.70	413.97	428.45	427.30
DRREDDY	1170.00	-0.75	1171.09	1240.33	1255.97
EICHERMOT	7990.50	-0.35	7934.42	7638.42	7311.59
ETERNAL	320.00	1.30	309.67	286.74	273.37
GRASIM	3270.00	-0.27	3211.50	3169.02	2905.66
HCLTECH	1324.80	2.06	1336.42	1222.14	1405.05
HDFCBANK	720.00	-0.41	736.18	770.62	858.26
HDFCLIFE	536.30	-0.36	544.46	560.38	655.69
HINDALCO	1038.95	-0.25	1010.84	990.40	949.82
HINDUNILVR	2020.70	-0.70	2091.06	2133.61	2251.23
ICICIBANK	1402.00	-0.71	1432.03	1402.98	1351.85
INDIGO	5193.00	-0.52	5265.78	5188.40	4921.02
INFY	1119.80	0.43	1142.22	1102.08	1334.93
ITC	267.05	-1.09	281.35	283.99	324.97

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	243.15	-1.08	250.50	243.27	260.17
JSWSTEEL	1285.80	1.44	1277.85	1262.08	1216.49
KOTAKBANK	390.25	0.67	390.96	391.46	401.15
LT	4041.30	-0.57	3983.56	4002.80	3978.07
M&M	3415.00	-0.19	3374.70	3218.98	3357.11
MARUTI	13690.00	-0.01	13910.70	13795.86	14455.50
MAXHEALTH	997.00	-1.72	1063.60	1079.31	1050.59
NESTLEIND	1465.00	0.17	1497.01	1454.65	1340.38
NTPC	336.55	-0.16	343.56	349.28	357.21
ONGC	238.00	-0.63	240.63	242.92	258.54
POWERGRID	263.50	-1.68	276.86	282.45	284.98
RELIANCE	1311.00	-0.83	1304.02	1303.94	1402.51
SBILIFE	1780.40	0.13	1850.58	1817.00	1922.24
SBIN	1048.60	-0.42	1049.26	1038.64	1034.38
SHRIRAMFIN	1106.00	-0.22	1088.00	1046.75	973.22
SUNPHARMA	1900.00	1.33	1947.00	1908.08	1789.76
TATACONSUM	1068.00	0.60	1087.50	1097.47	1136.94
TATASTEEL	184.00	-0.81	186.90	189.53	192.04
TCS	2289.00	0.39	2372.33	2230.52	2653.52
TECHM	1589.80	-0.14	1623.81	1525.42	1506.06
TITAN	5068.00	0.38	4947.39	4644.03	4236.16
TMPV	321.30	-0.46	337.00	345.62	355.63
TRENT	2953.00	0.37	2992.82	3013.82	2790.95
ULTRACEMCO	11450.00	-0.43	11873.85	11648.28	11791.28
WIPRO	179.55	0.84	183.07	179.17	213.17

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