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DAILY TECHNICAL & DERIVATIVES REPORT

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Shantanu Vartak | Shantanu.Vartak@bobcaps.in

Research Analyst.

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,577.40	160.24	0.30%
S&P 500	7,677.28	24.42	0.32%
NASDAQ 100	29,209.23	186.05	0.64%
FTSE 100	10,886.16	31.84	0.29%
NIKKIE (8:00 AM)	66,273.00	416.57	0.63%
HANG SENG (8:00 AM)	25,760.00	248.90	0.98%
GOLD	4,718.25	23.75	0.51%
SILVER	69.56	0.88	1.28%
BRENT OIL	85.30	-1.97	-2.26%
DOLLAR INDEX	98.87	0.03	0.03%
USD/INR	95.25	-	0.00%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street's** major indices closed higher on Tuesday as technology stocks recovered from the recent selloff ahead of Nvidia's earnings, while easing crude oil prices and lower bond yields improved risk appetite. **Asian markets** traded mostly higher on Wednesday, supported by gains in technology stocks and softer global bond yields.

- **The 10-year U.S. Treasury** yield declined to 4.61%, easing pressure on equity valuations and providing some relief to growth-oriented sectors. **Crude oil** prices fell around 2% on Wednesday, extending the previous session's decline, after Iran indicated that talks with Oman regarding the management and potential reopening of the Strait of Hormuz had resumed.

- **GIFT Nifty** trading at ~24,552.00 is indicating a positive bias for the Indian market on Wednesday.

MARKET SNAPSHOT

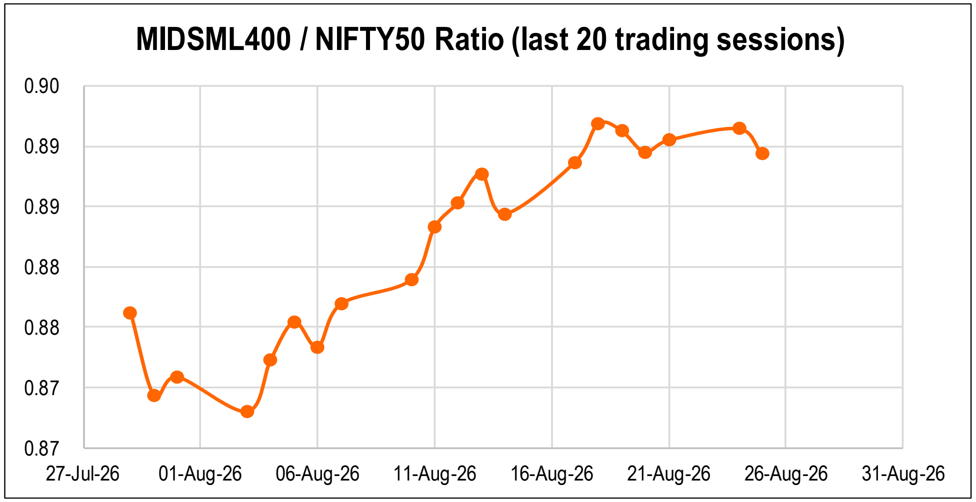
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,334.55	115.50	0.48%
SENSEX	77,656.09	286.98	0.37%
BANK NIFTY	57,514.20	-11.75	-0.02%
FIN NIFTY	26,246.95	88.45	0.34%
MIDCAP NIFTY	15,000.90	102.40	0.69%
NIFTY SMLCAP 250	18,347.15	-28.30	-0.15%
INDIA VIX	11.00	-0.53	-4.58%

Highlights

- Nifty witnessed sharp volatility during the final hour of the monthly expiry, recovering from around 24,115 to close near 24,334.
- The strong late-session reversal highlights robust buying interest at lower levels and improves the near-term market setup.
- Healthcare stocks such as Max Healthcare and Apollo Hospitals attracted fresh buying after recent profit booking.

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	34	16	0
NIFTY 500	268	232	0
NIFTY F&O	136	74	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	27	54%
NIFTY 500	253	51%



United Breweries

United Breweries announced the expansion of Heineken Silver across Kerala, Odisha and Madhya Pradesh to accelerate premiumisation. The strong response to Heineken Silver in existing markets reflects these evolving consumer preferences.

Honasa Consumer

The company has called off the proposed acquisition of a 58% stake in Fluence Pharma due to the non-fulfilment of closing conditions specified under the Share Purchase Agreement. The company remains committed to its nutraceutical strategy and will continue to evaluate the right opportunities, both organic and inorganic, to build a strong consumer-focused business in this category.

Cipla

The United States Food and Drug Administration (USFDA) conducted a follow-up current Good Manufacturing Practices (cGMP) inspection at the company's manufacturing facility in Pithampur from August 17 to 25, 2026. Following the inspection, the company received seven inspectional observations in Form 483.

Hindustan Copper

The Government of India has decided to exercise the oversubscription option to the extent of 2.90 crore equity shares, representing 3% of the total paid-up equity, in addition to the 2.9 crore shares forming part of the base offer size. Accordingly, the total offer size will be up to 5.8 crore equity shares, representing 6% of the total paid-up equity. The issue closes today.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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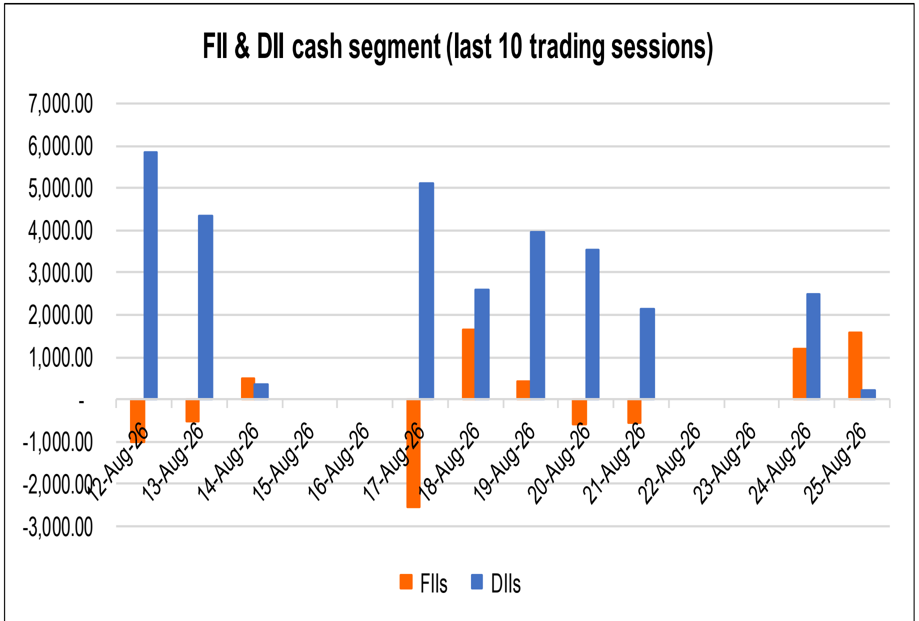
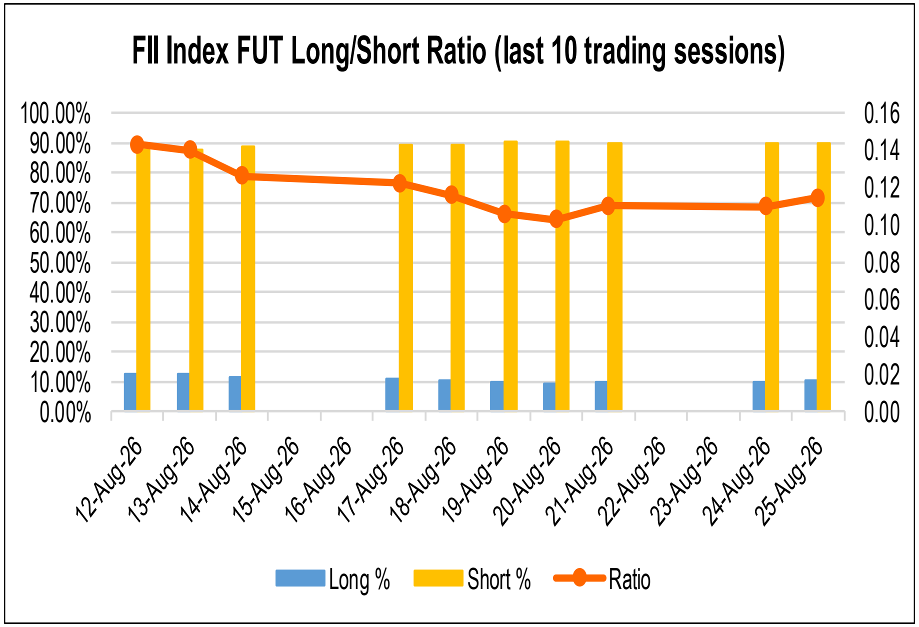
*INR in Crores

Cash Segment	25-Aug-2026	MTD	YTD
FII Net Flows	1,593.53	5,289.47	-3,46,233.35
DII Net Flows	230.26	37,093.01	5,42,329.42

*INR in Crores

FIIs F&O Flows	25-Aug-2026	MTD
Index Futures	-1,550.08	-8,959.80
Index Options	15,937.82	-24,081.03
Stock Futures	3,483.32	5,021.34
Stock Options	-944.78	-8,237.53





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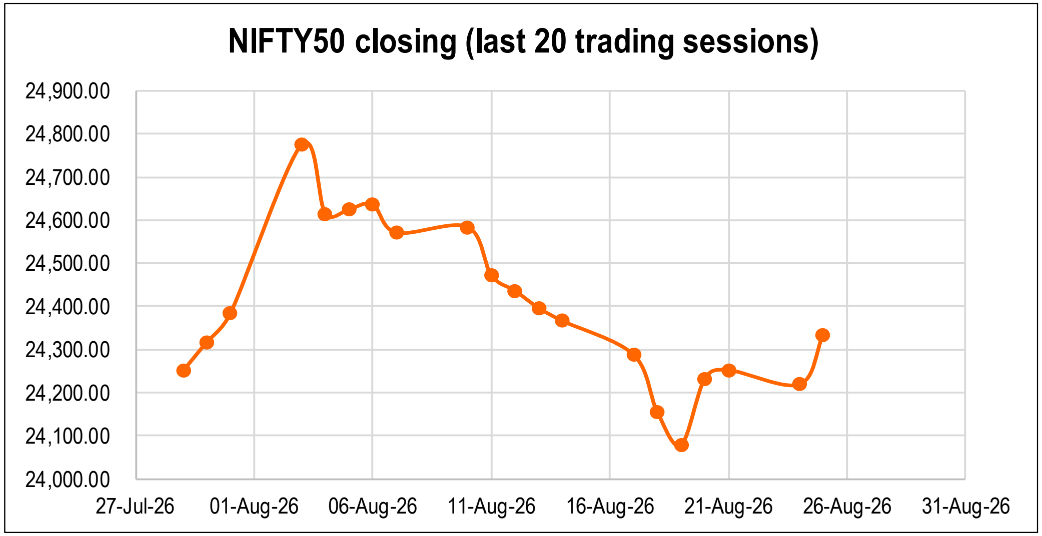
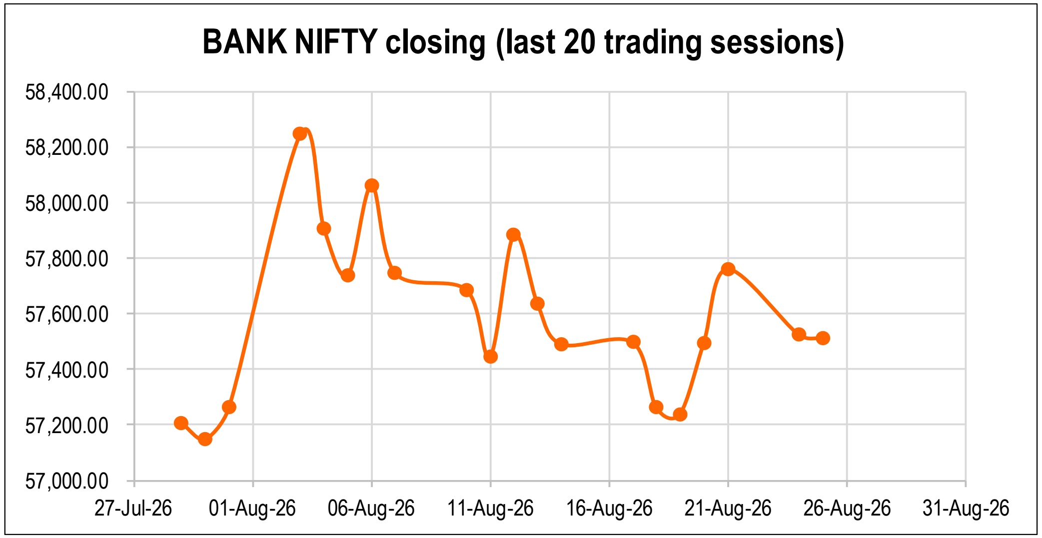
NIFTY	
Spot	24334.55
Futures	24471.70
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.23
Key Supply Zones	24500, 24700
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57514.20
Futures	57842.20
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	1.15
Key Supply Zones	57800, 58600
Key Demand Zones	57000, 56000



KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3110.00	3.72	3019.45	3060.36	2483.29
ADANIPORTS	1702.70	1.83	1688.74	1767.21	1595.24
APOLLOHOSP	8889.00	2.15	8838.55	8776.74	7838.80
ASIANPAINT	2639.80	-0.04	2712.83	2700.60	2607.44
AXISBANK	1235.00	-0.08	1239.74	1286.80	1286.75
BAJAJ_AUTO	11927.00	1.08	11670.92	10826.86	9863.60
BAJAJFINSV	2004.00	0.11	2021.72	1913.90	1910.52
BAJFINANCE	1087.40	0.97	1100.92	1048.08	976.31
BEL	413.25	1.04	402.53	408.64	419.58
BHARTIARTL	1947.00	0.62	1951.75	1921.94	1946.17
CIPLA	1422.00	-1.11	1453.25	1436.96	1397.58
COALINDIA	404.00	-0.71	410.29	425.13	427.66
DRREDDY	1193.50	0.29	1177.78	1233.04	1255.43
EICHERMOT	8055.00	0.10	7994.37	7694.79	7333.00
ETERNAL	331.00	1.18	316.81	293.60	273.44
GRASIM	3289.60	0.05	3249.23	3184.12	2913.09
HCLTECH	1315.80	-0.47	1342.85	1237.89	1400.38
HDFCBANK	727.50	-0.21	733.36	767.97	852.87
HDFCLIFE	546.70	-1.13	543.40	559.68	651.80
HINDALCO	1051.05	-0.70	1030.50	991.89	953.63
HINDUNILVR	2024.20	-0.29	2070.72	2122.87	2243.06
ICICIBANK	1422.70	0.54	1428.31	1410.80	1353.08
INDIGO	5218.00	2.01	5270.73	5228.21	4909.76
INFY	1144.00	1.24	1154.81	1102.36	1327.70
ITC	271.40	0.63	278.70	282.85	322.00

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	243.15	0.48	252.13	244.07	258.88
JSWSTEEL	1320.30	-0.50	1290.93	1263.97	1218.60
KOTAKBANK	401.60	0.04	394.22	391.72	400.66
LT	4119.00	0.71	4041.91	4010.49	3980.20
M&M	3443.00	0.85	3414.36	3250.25	3355.22
MARUTI	13678.00	0.43	13925.45	13822.46	14407.96
MAXHEALTH	1016.00	2.57	1044.62	1078.17	1047.31
NESTLEIND	1479.00	0.52	1499.82	1460.14	1344.35
NTPC	339.85	0.10	341.88	348.30	357.17
ONGC	234.00	-1.08	238.97	241.94	258.15
POWERGRID	271.00	-0.15	273.24	281.15	284.57
RELIANCE	1317.00	0.55	1311.93	1306.63	1398.97
SBILIFE	1755.00	-0.39	1831.77	1820.57	1918.38
SBIN	1048.00	0.82	1055.40	1041.48	1036.50
SHRIRAMFIN	1138.50	1.74	1108.29	1062.28	980.69
SUNPHARMA	1922.00	0.63	1936.65	1916.96	1793.87
TATACONSUM	1060.50	-0.19	1079.66	1093.69	1134.50
TATASTEEL	186.94	0.34	187.20	188.48	192.06
TCS	2296.20	0.53	2371.80	2241.87	2638.58
TECHM	1599.90	1.00	1625.54	1536.65	1509.21
TITAN	5124.80	0.90	5017.08	4720.49	4263.10
TMPV	314.25	-0.05	335.33	340.09	353.71
TRENT	2930.00	0.86	2997.56	3025.96	2786.48
ULTRACEMCO	11540.00	0.31	11803.75	11686.48	11782.48
WIPRO	180.09	-0.67	183.65	179.27	211.96

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Name of the Research Entity: BOB Capital Markets Limited
Registered office Address: 1704, B Wing, Parinee Crescenzo, G Block, BKC, Bandra East, Mumbai 400051
SEBI Research Analyst Registration No: INH000000040 (Perpetual)
SEBI Stock Broker Registration No: INZ000159332
SEBI Depository Participant Registration No: IN-DP-728-2022
SEBI Merchant Banker Registration No: INM000009926
Phone: +91-22-61389300
Name of the Compliance Officer: Mr. Sameer Khobrekar
Email ID: Compliance@bobcaps.in; Phone no.: +91-22-61389358
For any queries or grievances, you may contact the Grievance Officer.
Name of the Grievance Officer: Mr. Nilesh Mehta
Email ID: head-customercare@bobcaps.in; Phone no: 92288 60945
Brand Name: BOBCAPS
Website: https://www.bobcaps.in/
CIN: U65999MH1996GOI098009

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