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DAILY TECHNICAL & DERIVATIVES REPORT

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28th August, 2026

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GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,569.44	105.56	0.20%
S&P 500	7,730.99	55.29	0.72%
NASDAQ 100	29,641.56	417.04	1.43%
FTSE 100	10,792.54	-85.58	-0.79%
NIKKIE (8:00 AM)	66,620.00	488.02	0.74%
HANG SENG (8:00 AM)	25,598.00	32.26	0.13%
GOLD	4,636.79	-27.21	-0.58%
SILVER	68.99	-0.45	-0.64%
BRENT OIL	88.53	0.01	0.01%
DOLLAR INDEX	99.10	0.01	0.01%
USD/INR	95.56	0.02	0.02%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **The Nasdaq** outperformed Wall Street peers on Thursday, supported by a strong rally in semiconductor stocks after Nvidia's robust revenue outlook reaffirmed the strength of the AI-driven growth cycle and eased concerns over slowing AI infrastructure spending.

- **Japanese equities** also advanced, led by gains in electronics and banking stocks, as investors assessed the outlook for global monetary policy ahead of Fed Chair Kevin Warsh's first major speech since taking office.

- **GIFT Nifty** trading at ~24,251.00 is indicating a positive start for the Indian market on Friday.

MARKET SNAPSHOT

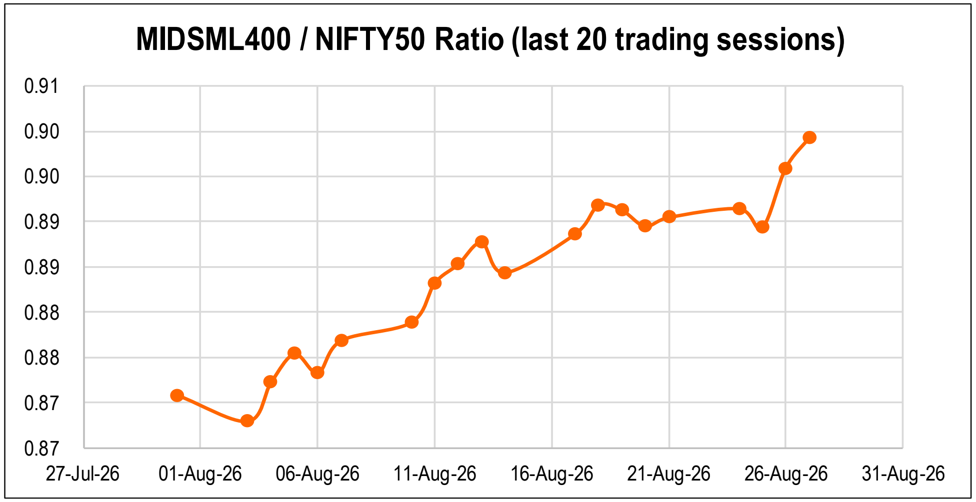
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,090.85	-116.90	-0.48%
SENSEX	76,933.59	-539.35	-0.70%
BANK NIFTY	57,509.95	-273.80	-0.47%
FIN NIFTY	26,280.65	-106.10	-0.40%
NIFTY MIDCAP 100	64,035.45	-65.75	-0.10%
NIFTY SMLCAP 100	20,040.65	-26.65	-0.13%
INDIA VIX	11.16	0.60	5.66%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	18	31	1
NIFTY 500	186	310	4
NIFTY F&O	83	123	4

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	23	46%
NIFTY 500	242	48%

Highlights

- Nifty broke below its six-day low after facing rejection near 24,300, signalling weakening near-term momentum.
- Kotak Bank continued to outperform with a 1.80% gain, while HDFC Bank touched a fresh 52-week low of ₹710.
- More than 50% stocks from the Nifty500 index trading below their respective 50-day moving averages suggests that bullish momentum is gradually fading, increasing the importance of support levels and selective stock-specific opportunities.



Wipro

The company announced the expansion of its partnership with Google Cloud to accelerate the enterprise-wide adoption of Gemini Enterprise and agentic AI. Additionally, Wipro is scaling the internal deployment of Gemini Enterprise and will empower more than 10,000 AI-certified specialists, including 1,500 Forward Deployed Engineers (FDEs), with advanced AI capabilities to enhance productivity, streamline operations and accelerate decision-making.

Adani Power

Adani Power has executed a Share Purchase Agreement with its subsidiary Chandenvalle Infra Park (CIPL), and AdaniConneX (ACPL) for the sale of its entire stake in CIPL to ACPL for Rs 535.69 crore. Upon completion of the transaction, Chandenvalle Infra Park will cease to be a subsidiary of the company.

Star Cement

In view of the amended provisions of the MMDR (Mines and Minerals (Development and Regulation)) Act, 1957, the company and its subsidiaries are no longer required to pay mineral cess with effect from August 22, 2026. The company and its subsidiaries had been paying mineral cess of Rs 25 per tonne on shale and Rs 60 per tonne on limestone in Meghalaya. They paid Rs 35.50 crore in FY26 and Rs 10.15 crore so far in the current FY27. The Central Government has amended the MMDR Act to restrict the imposition of taxes, cess and other levies by state governments on mineral rights or mineral-bearing lands. The Amendment Act, 2026, further provides that any levy not paid or collected by a state before the Amendment Act, 2026, shall be deemed invalid.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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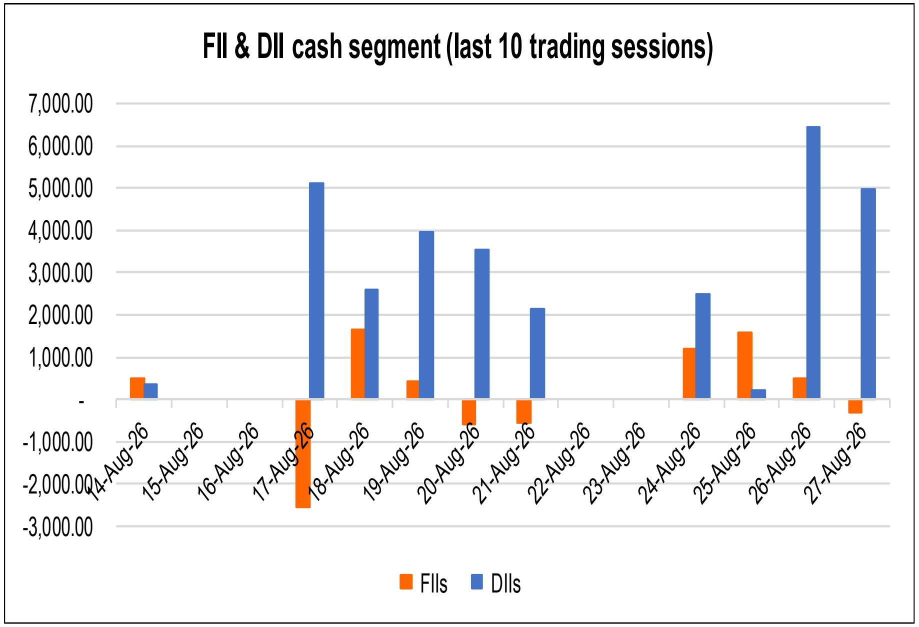
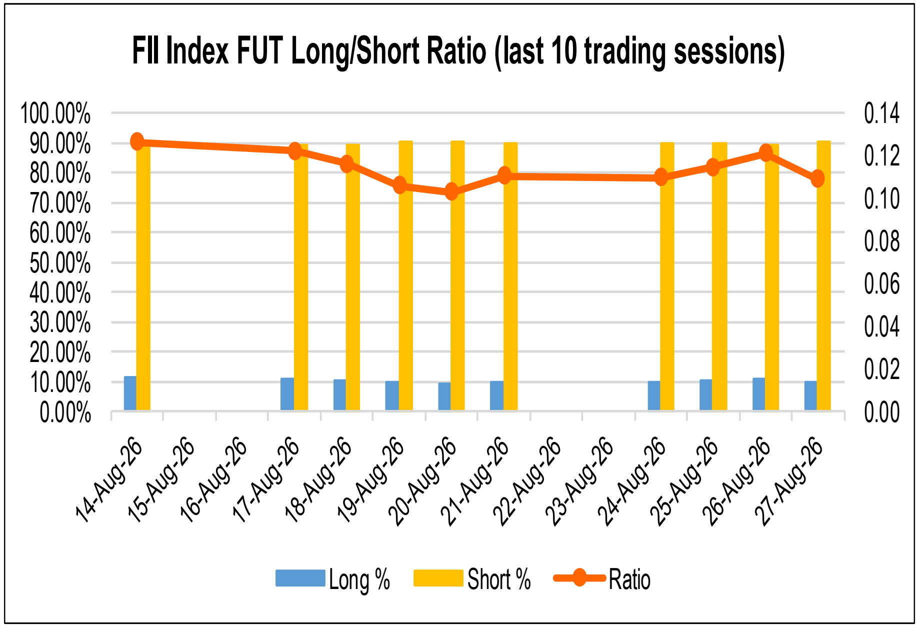
*INR in Crores

Cash Segment	27-Aug-2026	MTD	YTD
FII Net Flows	-298.26	5,493.84	-3,46,028.98
DII Net Flows	4,977.17	48,495.34	5,53,731.75

*INR in Crores

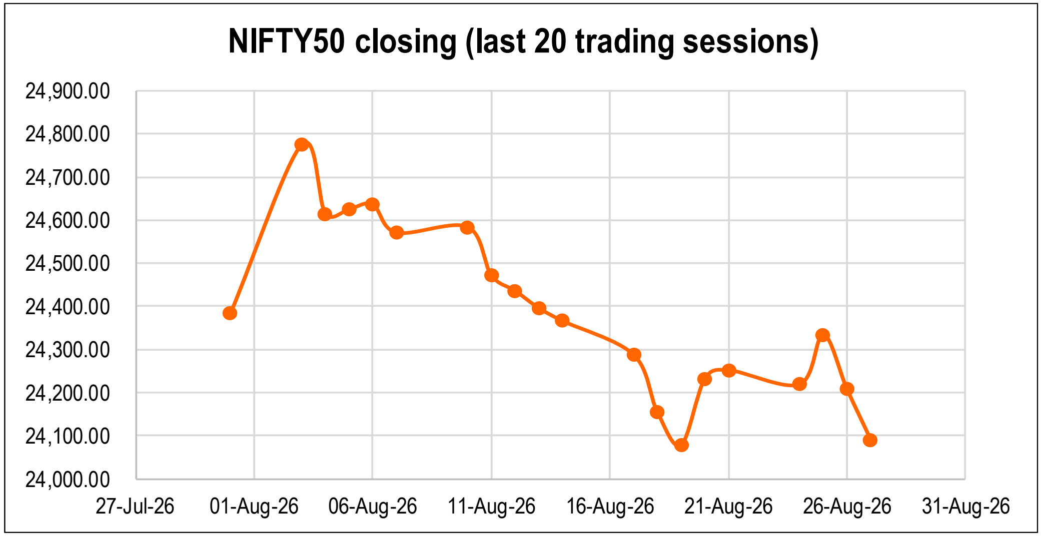
FIIs F&O Flows	27-Aug-2026	MTD
Index Futures	-1,871.04	-11,088.78
Index Options	6,885.99	-21,542.50
Stock Futures	-1,714.67	794.51
Stock Options	-641.97	-9,917.14



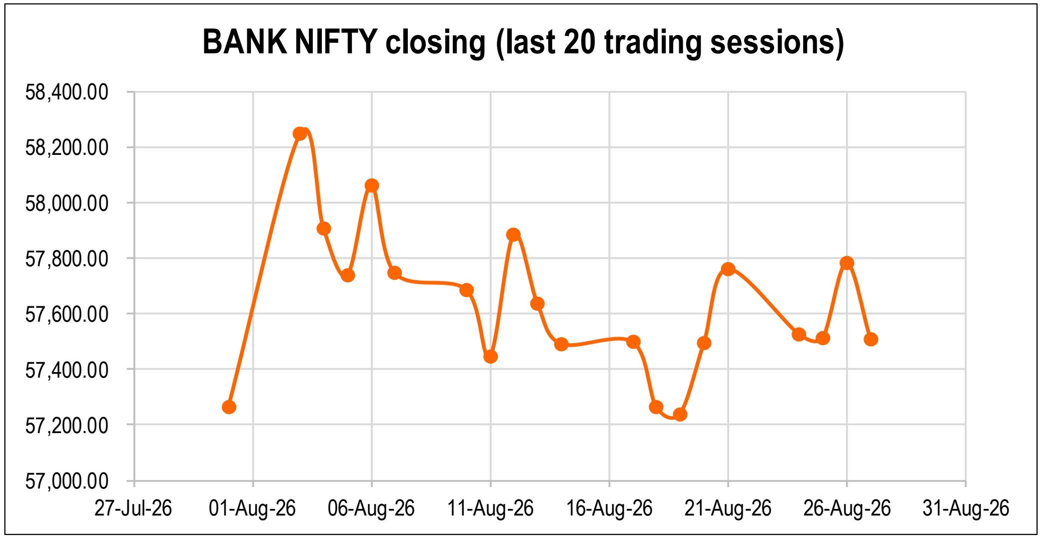


INDEX VIEW

NIFTY	
Spot	24090.85
Futures	24281.90
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.17
Key Supply Zones	24350, 24700
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57509.95
Futures	57902.60
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	1.09
Key Supply Zones	58000, 58600
Key Demand Zones	57450, 57000



KEY MOVING AVERAGES (NIFTY50 STOCKS)

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Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	3169.00	1.83	3029.82	3068.07	2491.73
ADANIPORTS	1714.00	1.33	1689.83	1762.30	1597.86
APOLLOHOSP	8800.00	0.38	8820.73	8791.71	7848.67
ASIANPAINT	2631.00	0.17	2700.48	2696.03	2608.28
AXISBANK	1256.00	0.08	1242.08	1282.69	1287.03
BAJAJ_AUTO	11720.00	-0.03	11704.62	10896.12	9893.46
BAJAJFINSV	2011.00	0.05	2031.08	1923.28	1909.95
BAJFINANCE	1083.00	-0.18	1103.92	1053.08	976.66
BEL	411.00	1.01	404.80	408.45	419.55
BHARTIARTL	1878.30	-1.25	1945.42	1922.98	1944.03
CIPLA	1420.00	1.23	1447.35	1438.93	1396.67
COALINDIA	400.00	-0.87	409.10	423.07	427.93
DRREDDY	1177.00	-0.42	1181.37	1229.30	1255.20
EICHERMOT	8100.00	0.81	8016.55	7716.10	7345.00
ETERNAL	328.50	0.46	318.46	296.47	273.62
GRASIM	3258.00	-1.27	3266.24	3189.46	2917.97
HCLTECH	1282.00	-1.27	1337.02	1242.98	1398.00
HDFCBANK	711.00	-2.23	730.16	765.29	850.22
HDFCLIFE	548.00	-0.90	543.35	558.58	649.91
HINDALCO	1024.00	-2.75	1037.71	993.62	955.91
HINDUNILVR	2009.00	-0.59	2060.93	2115.52	2239.18
ICICIBANK	1443.00	0.91	1428.37	1414.84	1354.15
INDIGO	5189.00	-1.17	5267.35	5242.63	4905.31
INFY	1110.80	-0.82	1150.81	1100.95	1324.18
ITC	269.00	-0.46	277.10	281.99	320.62

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	238.10	-1.20	251.27	243.96	258.27
JSWSTEEL	1337.50	-0.26	1297.48	1266.31	1220.24
KOTAKBANK	424.20	1.80	397.28	392.29	400.69
LT	4027.00	-0.27	4051.71	4003.91	3981.50
M&M	3330.00	-2.01	3425.50	3259.40	3352.86
MARUTI	13440.00	-0.59	13866.65	13815.24	14388.63
MAXHEALTH	1009.00	0.40	1033.51	1077.45	1046.06
NESTLEIND	1450.00	-0.10	1493.69	1462.19	1346.21
NTPC	330.90	-1.11	340.74	347.39	357.21
ONGC	232.00	-0.09	238.18	241.36	257.96
POWERGRID	264.90	-0.11	271.31	280.33	284.47
RELIANCE	1282.20	-1.22	1312.49	1305.00	1397.02
SBILIFE	1773.20	0.28	1820.22	1820.18	1916.37
SBIN	1042.90	-0.87	1058.20	1042.54	1037.38
SHRIRAMFIN	1101.00	-1.48	1115.62	1066.38	983.84
SUNPHARMA	1913.30	0.73	1927.74	1920.80	1796.05
TATACONSUM	1042.00	-0.49	1074.59	1090.36	1133.10
TATASTEEL	186.80	-0.64	187.23	188.08	192.15
TCS	2248.40	-0.95	2353.80	2243.79	2631.17
TECHM	1585.00	0.89	1617.68	1541.58	1510.88
TITAN	5139.30	0.77	5044.04	4750.90	4276.36
TMPV	316.00	0.93	333.59	337.58	352.79
TRENT	2878.50	-1.02	2986.67	3021.68	2784.28
ULTRACEMCO	11717.00	0.00	11783.20	11699.88	11781.00
WIPRO	176.40	-0.54	182.84	179.01	211.34

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