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DAILY TECHNICAL & DERIVATIVES REPORT

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MACRO PULSE

GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	53,559.99	-9.45	-0.02%
S&P 500	7,711.76	-19.23	-0.25%
NASDAQ 100	29,433.43	-208.13	-0.70%
FTSE 100	10,824.26	31.72	0.29%
NIKKIE (8:00 AM)	65,292.00	-1,113.56	-1.68%
HANG SENG (8:00 AM)	25,365.00	-219.79	-0.86%
GOLD	4,465.41	-64.49	-1.42%
SILVER	66.54	-1.25	-1.85%
BRENT OIL	90.52	4.40	5.11%
DOLLAR INDEX	99.54	-0.12	-0.12%
USD/INR	95.60	0.23	0.24%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- **Wall Street's** major indices ended lower on Friday as investors turned cautious after Fed Chair Kevin Warsh reiterated the central bank's focus on controlling inflation, increasing expectations of a possible rate hike.

- **The 10-year U.S. Treasury yield** remained elevated around 4.71%, while the 2-year yield held near 4.33% after rising sharply on Friday.

- **Crude oil** prices jumped more than $1 per barrel after fresh U.S.-Iran military escalation around the Strait of Hormuz raised concerns over energy supply disruptions.

- **GIFT Nifty** trading at ~24,228.00 is indicating a negative start for the Indian market on Monday.

MARKET SNAPSHOT

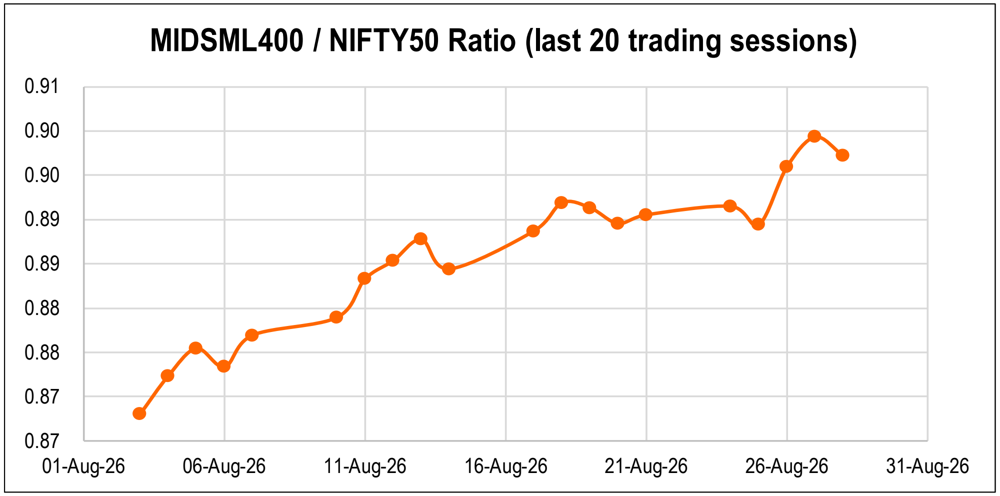
INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	24,175.65	84.80	0.35%
SENSEX	77,264.51	330.92	0.43%
BANK NIFTY	57,496.30	-13.65	-0.02%
FIN NIFTY	26,286.50	5.85	0.02%
NIFTY MIDCAP 100	64,069.50	34.05	0.05%
NIFTY SMLCAP 100	20,080.00	39.35	0.20%
INDIA VIX	10.68	-0.39	-3.50%

INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	30	19	1
NIFTY 500	225	271	4
NIFTY F&O	91	117	2

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	23	46%
NIFTY 500	241	48%

Highlights

- Nifty remained range-bound but managed to close in the green, indicating some stability after the recent weakness.
- IT stocks staged a strong rebound, with TCS gaining over 4% and Tech Mahindra rising over 3%.
- More than 50% of Nifty 50 and Nifty 500 stocks are trading below their respective 50-day SMAs, signalling weakening breadth beneath the benchmark. India VIX at 10.68 reflects subdued volatility; however, the combination of low volatility and weak market breadth warrants a cautious approach until stronger participation emerges.



Reliance Industries

Jio Platforms (JPL), a subsidiary of the company, has received the observation letter from the Securities and Exchange Board of India (SEBI) on the Draft Red Herring Prospectus (DRHP) filed for its proposed initial public offering (IPO).

HDFC Bank

Sashidhar Jagdishan has decided not to seek reappointment as the Managing Director & Chief Executive Officer (MD & CEO) of HDFC Bank. Accordingly, he will retire from the services of the bank effective October 26, 2026. The Board has decided to fast-track the process for the selection and appointment of his successor well within time.

Cipla

The United States Food and Drug Administration (USFDA) has classified the inspection of Unit 3, a manufacturing facility of Cipla's subsidiary InvaGen Pharmaceuticals Inc. in the US, as Voluntary Action Indicated. The USFDA conducted an inspection of the said facility from July 13 to 17, 2026.

Prestige Estates Projects

Prestige Estates announced the launch of a new residential development in Madhavaram, North Chennai, named Prestige Palm Court. The development is spread across 7.98 acres of land in Madhavaram, with an estimated gross development value (GDV) of Rs 1,330 crore.

Mahindra and Mahindra

Mahindra announced the expansion of its Battery-as-a-Service (BaaS) programme across its entire electric-origin SUV portfolio, making it available on the BE 6 SPORTEQ, XEV 9S and XEV 9e.

*Source: moneycontrol.com

INSTITUTIONAL ACTIVITY

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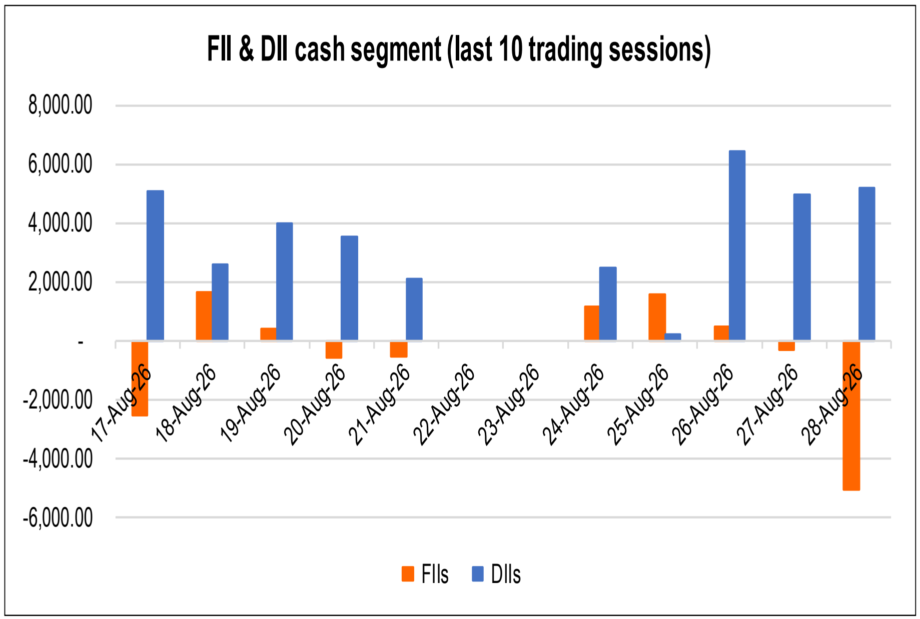
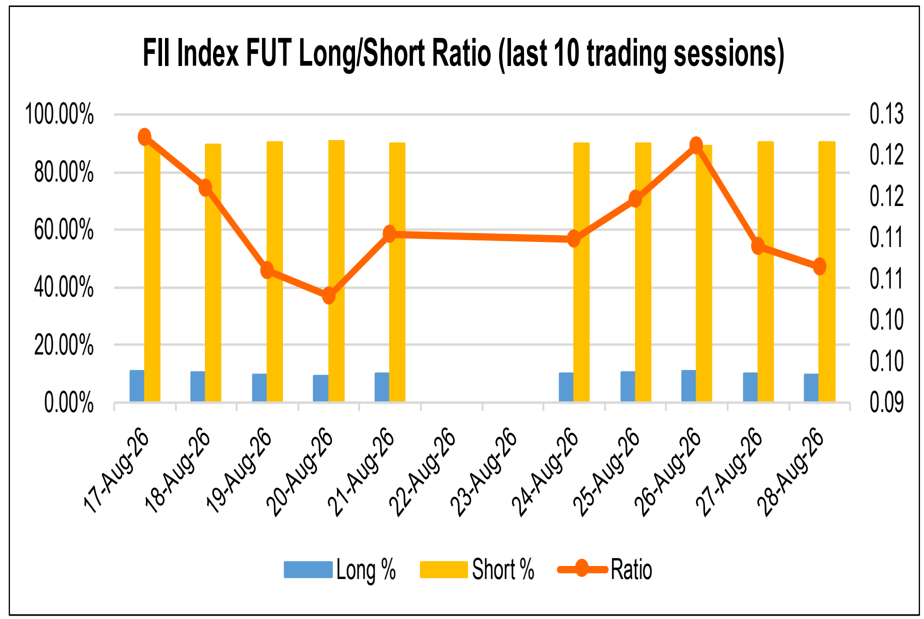
*INR in Crores

Cash Segment	28-Aug-2026	MTD	YTD
FII Net Flows	-5,039.80	454.04	-3,51,068.78
DII Net Flows	5,183.93	53,679.27	5,58,915.68

*INR in Crores

FIIs F&O Flows	28-Aug-2026	MTD
Index Futures	-774.13	-11,862.91
Index Options	298.58	-21,243.92
Stock Futures	148.46	942.97
Stock Options	100.96	-9,816.18





INDEX VIEW

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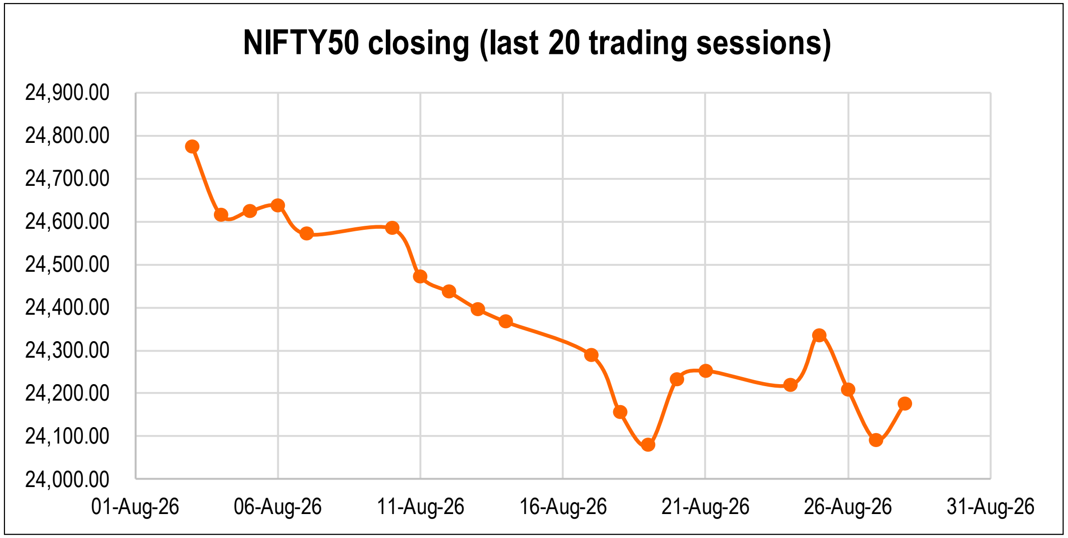
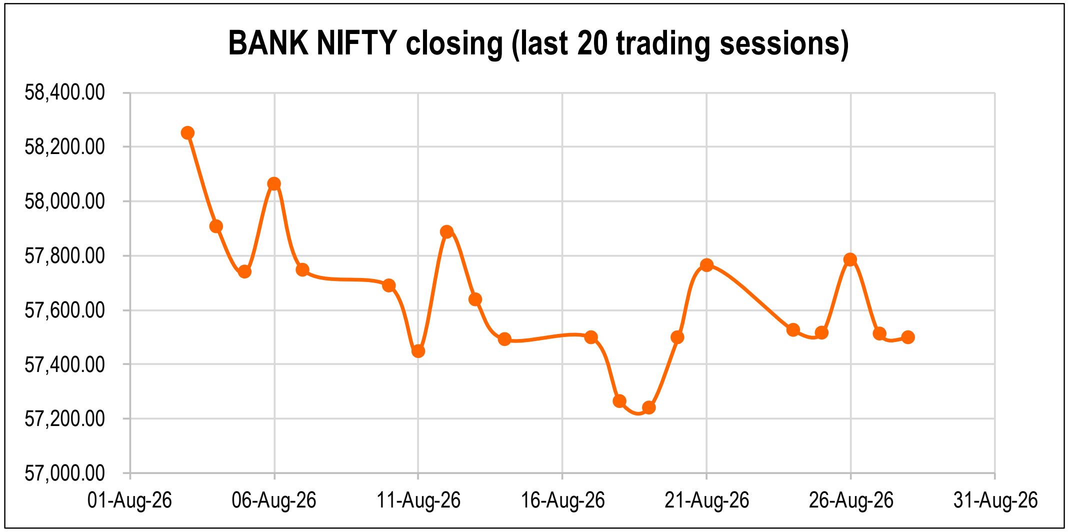
NIFTY	
Spot	24175.65
Futures	24341.90
Highest CE OI (29th SEPT)	25000
Highest PE OI (29th SEPT)	24000
PCR (29th SEPT)	1.15
Key Supply Zones	24350, 24700
Key Demand Zones	24000, 23650



BANK NIFTY	
Spot	57496.30
Futures	57859.00
Highest CE OI (29th SEPT)	57500
Highest PE OI (29th SEPT)	57500
PCR (29th SEPT)	1.11
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	3168.50	-0.02	3037.77	3071.17	2496.09
ADANIPORTS	1707.50	-0.38	1690.38	1759.61	1599.16
APOLLOHOSP	8838.50	0.44	8814.80	8800.25	7854.65
ASIANPAINT	2608.70	-0.85	2693.55	2693.11	2608.25
AXISBANK	1265.00	0.72	1243.85	1280.78	1287.24
BAJAJ_AUTO	11910.00	1.62	11724.10	10932.78	9909.41
BAJAJFINSV	2002.00	-0.45	2029.72	1927.89	1909.45
BAJFINANCE	1079.90	-0.29	1100.86	1055.50	976.73
BEL	411.90	0.22	406.01	408.11	419.54
BHARTIARTL	1882.40	0.22	1940.94	1923.13	1943.43
CIPLA	1423.50	0.25	1444.87	1440.29	1396.26
COALINDIA	401.00	0.25	408.45	422.05	428.05
DRREDDY	1178.00	0.08	1182.87	1227.51	1255.06
EICHERMOT	8059.00	-0.51	8027.82	7725.26	7350.86
ETERNAL	328.00	-0.15	319.74	297.86	273.73
GRASIM	3290.00	0.98	3275.70	3192.36	2920.80
HCLTECH	1316.10	2.66	1335.48	1246.07	1397.02
HDFCBANK	720.30	1.31	728.77	763.72	848.91
HDFCLIFE	548.00	0.00	543.32	557.71	648.90
HINDALCO	1037.40	1.31	1040.86	994.20	957.15
HINDUNILVR	2010.40	0.07	2056.39	2111.36	2237.35
ICICIBANK	1422.80	-1.40	1427.74	1416.45	1354.55
INDIGO	5166.00	-0.44	5267.10	5245.72	4903.22
INFY	1144.00	2.99	1151.51	1101.28	1322.51
ITC	266.00	-1.12	276.35	281.49	319.93

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
JIOFIN	238.40	0.13	250.36	243.84	257.97
JSWSTEEL	1334.90	-0.19	1300.73	1267.13	1221.06
KOTAKBANK	423.70	-0.12	398.95	392.70	400.72
LT	4045.80	0.47	4057.06	4001.03	3982.32
M&M	3334.00	0.12	3422.27	3263.35	3351.08
MARUTI	13376.00	-0.48	13823.75	13813.08	14378.11
MAXHEALTH	1014.10	0.51	1029.29	1075.92	1045.45
NESTLEIND	1454.60	0.32	1490.94	1463.27	1347.17
NTPC	330.05	-0.26	339.88	346.75	357.23
ONGC	232.25	0.11	237.67	241.10	257.86
POWERGRID	266.05	0.43	270.40	279.87	284.44
RELIANCE	1287.00	0.37	1311.45	1304.18	1396.07
SBILIFE	1761.10	-0.68	1814.17	1819.25	1915.18
SBIN	1047.50	0.44	1059.20	1042.64	1037.84
SHRIRAMFIN	1086.90	-1.28	1117.63	1068.07	985.19
SUNPHARMA	1920.00	0.35	1924.21	1922.70	1797.20
TATACONSUM	1040.70	-0.12	1072.48	1088.95	1132.47
TATASTEEL	186.50	-0.16	187.07	187.80	192.18
TCS	2342.00	4.16	2352.62	2246.57	2627.92
TECHM	1640.90	3.53	1617.16	1545.45	1512.15
TITAN	5169.20	0.58	5058.74	4766.53	4283.36
TMPV	319.40	1.08	332.57	336.67	352.36
TRENT	2898.00	0.68	2981.28	3016.04	2783.35
ULTRACEMCO	11589.00	-1.09	11767.50	11703.06	11779.70
WIPRO	180.95	2.58	182.71	178.97	211.06

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