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DAILY TECHNICAL & DERIVATIVES REPORT

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Research Analyst.



GLOBAL SCRIPS	LTP	CHANGE	% CHG
DJIA	51,176.96	250.40	0.49%
S&P 500	7,722.72	56.27	0.73%
NASDAQ 100	30,807.93	306.37	1.00%
FTSE 100	10,461.95	33.68	0.32%
NIKKEI (8:00 AM)	70,006.00	1,696.54	2.48%
HANG SENG (8:00 AM)	23,895.50	-76.79	-0.32%
GOLD	4,183.07	20.77	0.50%
SILVER	61.60	1.18	1.96%
BRENT OIL	101.44	-0.81	-0.79%
DOLLAR INDEX	101.95	0.23	0.23%
USD/INR	96.33	0.02	0.02%

*Closed

*Source: investing.com, moneycontrol.com

Global updates

- The yield on **10-year Treasury** dipped to 5.25%.
- The **dollar** started the week on a firm footing, hovering near a 17-month high on Monday as traders weighed receding odds of a Federal Reserve rate hike this month after soft US jobs data while fiscal worries in France left the euro vulnerable.
- **US stocks** advanced on Friday to close out the trading week after weaker-than-expected jobs data dampened expectations for a rate hike from the Federal Reserve at its policy meeting this month. Asian stocks rose earlier on Monday.
- **GIFT Nifty** trading at ~22,624.00 is indicating a positive start for the Indian market on Monday.



MARKET SNAPSHOT

INDIAN INDICES	LTP	CHANGE	% CHG
NIFTY 50	22,421.95	-198.50	-0.88%
SENSEX	71,909.70	-570.59	-0.79%
BANK NIFTY	54,450.75	-182.30	-0.33%
FIN NIFTY	24,556.10	-93.40	-0.38%
NIFTY MIDCAP 100	58,732.00	-600.05	-1.01%
NIFTY SMLCAP 100	19,058.65	-187.05	-0.97%
INDIA VIX	14.46	0.97	7.15%

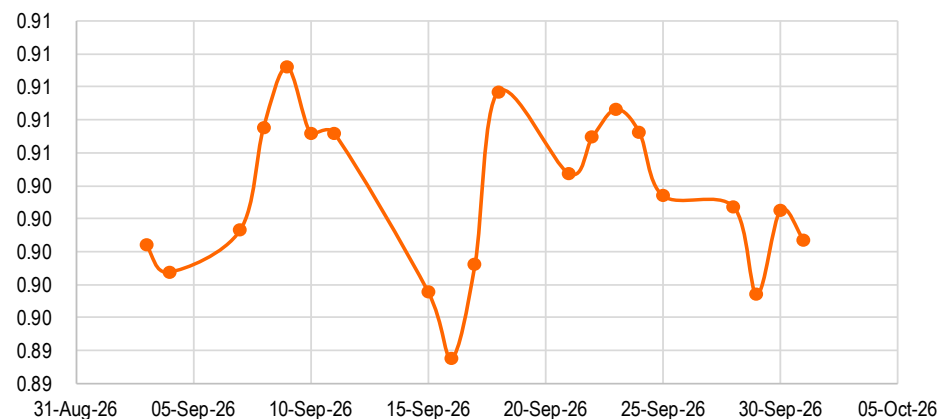
INDEX	ADVANCE	DECLINE	UNCHANGED
NIFTY 50	13	37	0
NIFTY 500	110	390	0
NIFTY F&O	56	157	0

INDEX	SCRIPS ABOVE 50 DSMA	%
NIFTY 50	4	8%
NIFTY 500	88	18%

Highlights

- Nifty witnessed its steepest weekly decline of 3.11% since March earlier this year.
- Despite the broader bearishness, IT, Pharma & Healthcare emerged as relatively resilient sectors on Thursday.
- Insurance stocks, including HDFCLIFE and SBILIFE, attracted buying interest around lower levels, indicating selective accumulation amid the market weakness. INFY emerged as Nifty's top gainer, surging 4.11% and providing some support to the benchmark.

MIDSM400 / NIFTY50 Ratio (last 20 trading sessions)





HDFC Bank

The Reserve Bank of India has approved the appointment of Anup Bagchi as Managing Director & Chief Executive Officer (MD & CEO) of HDFC Bank for a period of three years, effective October 27. Consequently, the Board has appointed Anup Bagchi as MD & CEO of HDFC Bank. Currently, Anup Bagchi is MD & CEO of ICICI Prudential Life Insurance.

DLF

The company announced the complete sell-out of The Aureva, its luxury residential project in Gurugram. The project has achieved sales of around Rs 1,985 crore.

Aurobindo Pharma

Aurobindo Pharma has received final approval from the US Food and Drug Administration (USFDA) to manufacture and market Perampanel tablets, 2 mg, 4 mg, 6 mg, 8 mg, 10 mg, and 12 mg, in the US. The product is bioequivalent and therapeutically equivalent to the reference listed drug (RLD), Fycompa Tablets of Catalyst Pharmaceuticals Inc., and will be launched in Q3FY27. Perampanel tablets are indicated for the treatment of partial-onset seizures with or without secondarily generalised seizures in patients with epilepsy aged 4 years and older.

Tata Consultancy Services

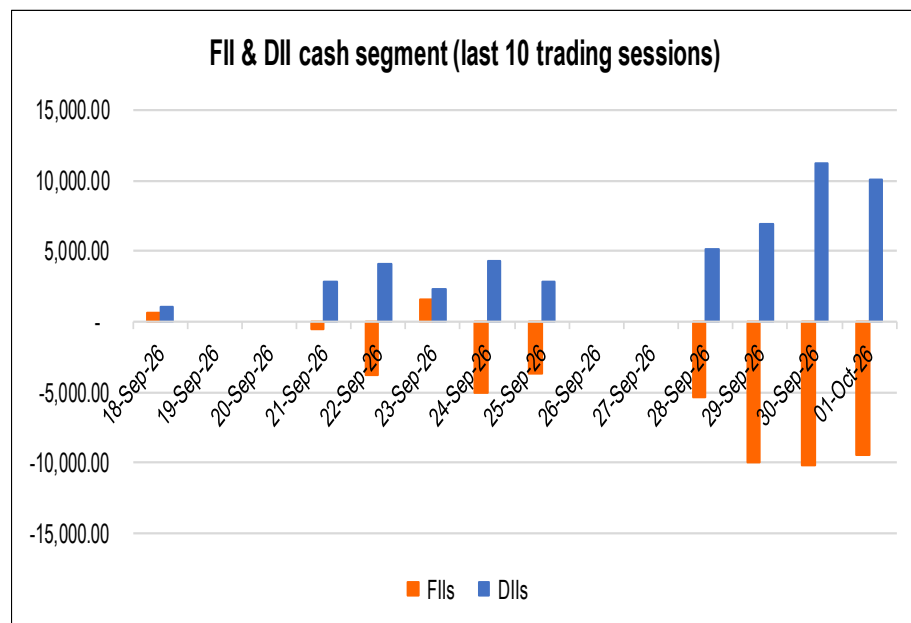
TCS announced an agreement with Best Buy to transition Best Buy's Global Capability Center (GCC) in India to TCS. The agreement will combine the GCC's deep retail and enterprise knowledge with TCS's technology, engineering, AI, and global delivery capabilities to accelerate innovation, scale AI-powered solutions, and deliver greater business value.



INSTITUTIONAL ACTIVITY

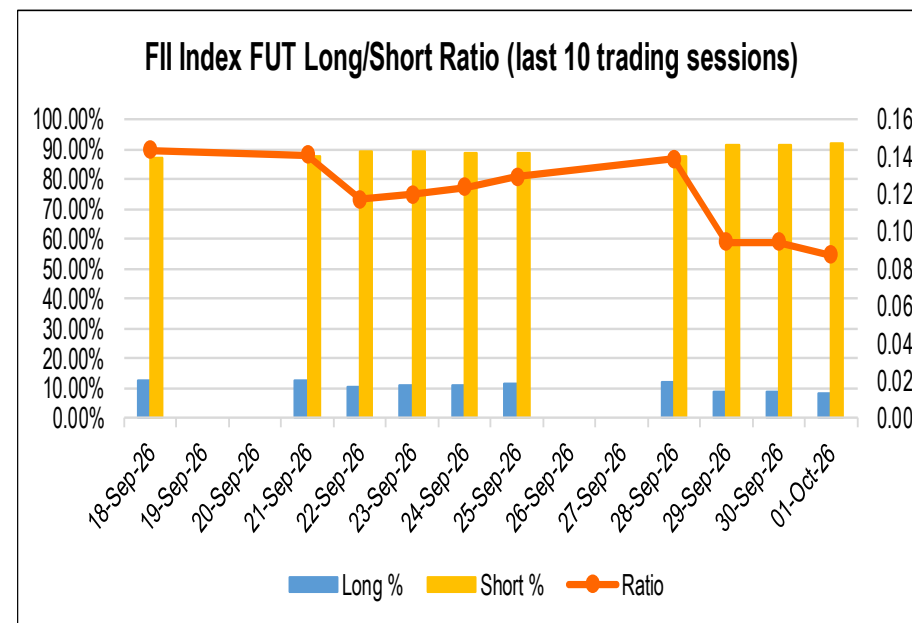
*INR in Crores

Cash Segment	1-Oct-2026	MTD	YTD
FII Net Flows	-9,484.22	-9,484.22	-4,12,551.70
DII Net Flows	10,041.84	10,041.84	6,49,576.69



*INR in Crores

FII's F&O Flows	1-Oct-2026	MTD
Index Futures	-3,955.86	-3,955.86
Index Options	5,013.67	5,013.67
Stock Futures	2,569.05	2,569.05
Stock Options	362.70	362.70



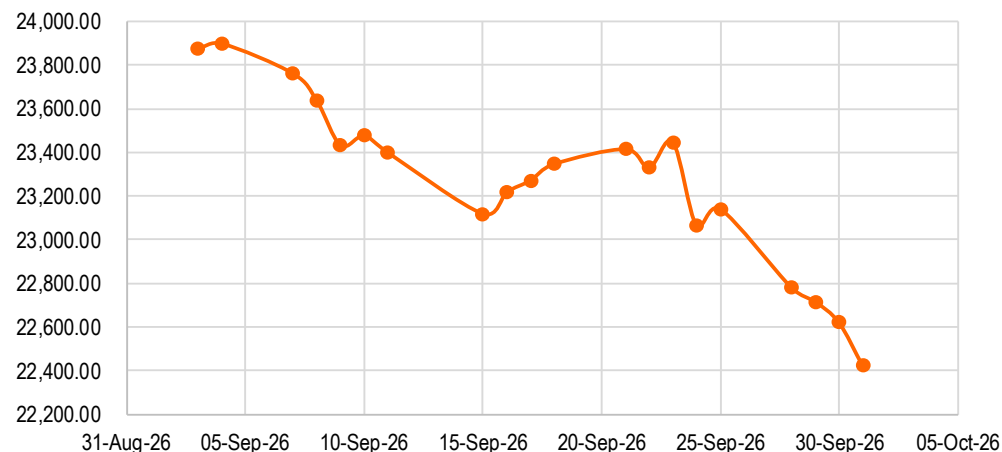


INDEX VIEW

NIFTY

Spot	22421.95
Futures	22530.30
Highest CE OI (27 th OCT)	23500
Highest PE OI (27 th OCT)	23500
PCR (27 th OCT)	0.98
Key Supply Zones	22500, 22800
Key Demand Zones	22150, 21800

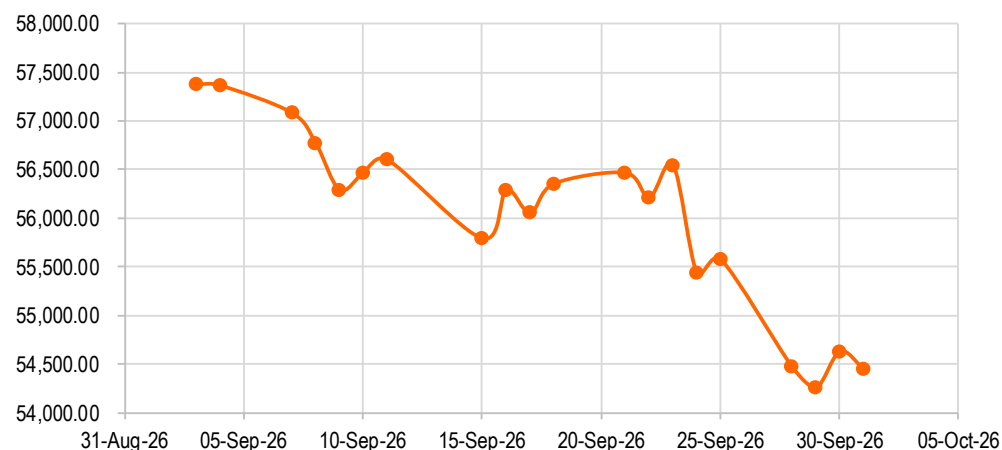
NIFTY50 closing (last 20 trading sessions)



BANK NIFTY

Spot	54450.75
Futures	54794.80
Highest CE OI (27 th OCT)	58000
Highest PE OI (27 th OCT)	58000
PCR (27 th OCT)	0.86
Key Supply Zones	55200, 55800
Key Demand Zones	54000, 53000

BANK NIFTY closing (last 20 trading sessions)





Sector-wise Performance

Index	LTP	1 Day	1 Week	1 Month	1 Day vs Nifty50	1 Week vs Nifty50	1 Month vs Nifty50
Nifty India Defence	9,142.55	-1.45%	-0.96%	-5.83%	Under-performance	Out-performance	Out-performance
Nifty Infrastructure	8,605.15	-1.47%	-2.02%	-6.44%	Under-performance	Under-performance	Under-performance
Nifty Energy	36,388.15	-0.68%	-0.83%	-4.41%	Out-performance	Out-performance	Out-performance
Nifty Financial Services	24,556.10	-0.38%	-0.47%	-5.74%	Out-performance	Out-performance	Out-performance
Nifty IT	28,304.70	2.17%	0.78%	-7.79%	Out-performance	Out-performance	Under-performance
Nifty Realty	835.00	-1.46%	-1.87%	-8.03%	Under-performance	Under-performance	Under-performance
Nifty FMCG	43,789.85	-1.61%	-3.26%	-4.58%	Under-performance	Under-performance	Out-performance
Nifty Pharma	26,311.55	-0.48%	-1.68%	-0.63%	Out-performance	Under-performance	Out-performance
Nifty Healthcare	16,095.55	-0.26%	-2.67%	-1.90%	Out-performance	Under-performance	Out-performance
Nifty Oil & Gas	10,474.85	-1.32%	-1.74%	-6.37%	Under-performance	Under-performance	Under-performance
Nifty Auto	25,384.95	-3.46%	-4.30%	-8.39%	Under-performance	Under-performance	Under-performance
Nifty Metal	12,460.70	-2.35%	-3.06%	-6.43%	Under-performance	Under-performance	Under-performance
Nifty PSU Bank	7,937.80	-0.98%	-1.10%	-6.78%	Under-performance	Out-performance	Under-performance
Nifty Private Bank	26,697.25	0.01%	0.83%	-4.05%	Out-performance	Out-performance	Out-performance
Nifty Bank	54,450.75	-0.33%	-0.04%	-5.09%	Out-performance	Out-performance	Out-performance
Nifty Consumer Durables	35,927.80	-1.91%	-5.86%	-9.01%	Under-performance	Under-performance	Under-performance

Stocks to watch: HAVELLS, HDFCLIFE, NYKAA.

Stocks in F&O ban: AMBUJACEM, BANDHANBNK, SAIL.



KEY MOVING AVERAGES (NIFTY50 STOCKS)

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ADANIENT	2816.80	-2.98	2954.09	2992.20	2567.12
ADANIPTS	1737.80	-3.36	1759.51	1721.66	1627.50
APOLLOHSP	8133.50	-0.39	8758.90	8802.81	8019.50
ASIANPAINT	2407.00	0.18	2453.04	2593.87	2562.84
AXISBANK	1217.10	-0.73	1237.61	1240.73	1284.75
BAJAJ_AUTO	10045.00	-7.62	11407.60	11570.33	10200.58
BAJAJFINSV	1732.60	0.09	1851.75	1941.65	1887.18
BAJFINANCE	948.30	-1.16	1016.52	1058.25	976.88
BEL	383.10	-1.34	396.19	400.85	417.87
BHARTIARTL	1741.10	-0.90	1819.45	1885.50	1910.82
BSE	3046.00	-1.49	3254.44	3362.36	3302.83
CIPLA	1344.00	-0.15	1377.29	1415.19	1380.80
COALINDIA	420.40	-1.08	422.08	415.30	432.69
DRREDDY	1206.20	-2.17	1181.68	1176.25	1247.13
EICHERMOT	6920.00	-3.22	7461.70	7758.11	7406.27
ETERNAL	313.90	-1.91	326.07	319.91	276.70
GRASIM	2962.00	-3.26	3199.83	3224.62	2974.89
HCLTECH	1243.10	1.07	1254.34	1299.31	1355.60
HDFCBANK	721.20	1.76	717.75	725.35	816.66
HDFCLIFE	534.20	2.49	535.99	541.42	622.41
HINDALCO	941.85	0.01	983.43	1004.25	978.36
HINDUNILVR	1836.00	-2.29	1932.31	2010.84	2186.23
ICICIBANK	1310.60	-0.84	1357.06	1401.31	1353.57
INDIGO	4929.90	-1.09	4930.77	5109.01	4823.41
INFY	1035.00	4.11	1046.84	1102.21	1265.69

Symbol	LTP	%Change	20 DSMA	50 DSMA	200 DSMA
ITC	255.90	-2.61	263.68	271.53	303.75
JIOFIN	212.50	-2.02	227.99	239.50	249.36
JSWSTEEL	1233.00	-1.63	1276.25	1285.26	1235.71
KOTAKBANK	418.35	0.32	414.15	404.76	399.95
LT	3693.40	-1.77	3873.84	3952.96	3968.40
M&M	2860.00	-3.05	3057.71	3242.71	3279.94
MARUTI	11386.00	-4.86	12263.20	13156.64	13968.98
MAXHEALTH	940.95	1.20	1015.79	1033.19	1033.26
NESTLEIND	1307.70	-0.18	1371.81	1439.55	1361.36
NTPC	315.10	-2.37	327.73	335.26	357.50
ONGC	222.37	-1.52	233.69	236.68	256.52
POWERGRID	254.55	-2.28	265.34	270.29	283.80
RELIANCE	1167.70	-1.63	1245.01	1280.06	1363.62
SBILIFE	1721.60	1.49	1724.41	1781.88	1883.35
SBIN	954.10	-0.56	989.13	1024.19	1041.11
SHRIRAMFIN	945.00	-3.84	1004.94	1057.92	1005.91
SUNPHARMA	1801.00	-0.86	1857.90	1906.29	1807.70
TATACONSUM	957.00	0.79	991.43	1040.33	1113.34
TATASTEEL	178.00	-3.42	185.63	186.08	193.94
TCS	2075.00	1.19	2160.92	2276.44	2518.11
TECHM	1533.00	0.59	1549.62	1590.29	1519.75
TITAN	4515.70	-1.55	4873.28	4948.13	4403.15
TMPV	279.40	-1.45	298.88	317.29	344.65
TRENT	2580.00	-1.59	2751.74	2877.84	2774.24
ULTRACEMCO	10710.00	-2.25	10995.35	11456.78	11708.20



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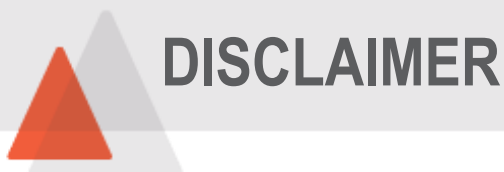
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