

# TECHNICAL BUILDUP

# OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 25176
- Crucial moving average of 20/50 SMA are at 25625 and 25694
- 200 SMA trend deciding level exist at 25348

### Indian Equity Market Performance:

Indian equity markets tumbled on Friday, with key benchmark indexes falling more than 1 percent, as rising geopolitical tensions as well as AI-disruption worries spooked investors.

Wall Street witnessed a sharp sell-off last Friday as investors reacted nervously to a mix of inflation worries, rising bond yields and geopolitical tensions.

### Sectoral Front Performance:

On the sectoral front, Selling pressure was visible across sectors, particularly in banking, financials and auto stocks, dragging the broader market lower.

### Technical Analysis:

The NSE Nifty 50 came under intense selling pressure, forming a long red candle on the daily charts with above-average volumes — a clear sign that bears tightened their grip on the market. In a single session, the index slipped below its crucial 200-day EMA and SMA, a development that has weakened the broader technical structure. Momentum indicators echoed the pessimism. The RSI slid to 40, reflecting fading strength, while the MACD remained firmly below both the reference and zero lines, with the histogram pointing to further downside bias. From a technical perspective, the 24,950–24,900 zone has now emerged as a critical near-term support band. A decisive breach below 24,900 could accelerate the decline toward the next key support at 24,600. On the upside, the 25,450–25,500 range is expected to pose a stiff resistance. Only a convincing breakout above this hurdle would revive bullish momentum. For now, these levels are likely to serve as the battleground that determines the index's next directional move.

### Option Activity:

On the option front, maximum Put OI is at 25000 followed by 25200 strike, while maximum Call OI is at 25500 followed by 25400 strike. Call writing was seen at 25400 strike, followed by 25300 strike while Put writing was seen at 25150 strike, followed by 25100

World Indices	LTP	Daily Ch (Pts)	Daily Ch (%)
Dow Jones	48978	-521.28	-1.05
Nasdaq	22668	-210.17	-0.92
S&P 500	6879	-29.98	-0.43
FTSE 100	10911	63.85	0.59
DAX	25284	-4.76	-0.02
Hang Seng	25943	-688.04	-2.58
Nikkei	57911	-939.27	-1.60
Sensex	81287	-961.42	-1.17
Nifty	25179	-317.90	-1.25

Commodity / Forex	LTP	Daily Ch (Pts)	Daily Ch (%)
Gold (\$/Oz)	5,343.40	95.50	1.82
Silver (\$/Oz)	93.60	0.31	0.36
Brent Crude (\$/bl)	76.22	3.35	4.60
Dollar Index	97.83	0.26	0.26
USD/INR	91.23	0.19	0.20
USD/YEN	156.31	0.25	0.16
EUR/USD	1.18	0.00	-0.26

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	80040	80700	81287	82020	82680
Nifty	24800	25000	25178	25400	25600
Nifty (Fut)	24961	25161	25339	25561	25761

Pivot Level	
Sensex	81564
Nifty	25265

# ECONOMY NEWS

The commerce ministry has convened a meeting of exporters, shipping lines, freight forwarders, and officials from other ministries on Monday to assess the impact of escalating tensions in the West Asia region on India's trade, an official said. (BS)

India faces mounting energy risks after US and Israeli strikes on Iran killed its supreme leader, Ayatollah Ali Khamenei, in the gravest escalation of tensions in West Asia in decades, sending shockwaves through shipping, aviation and global oil sectors. (BS)

India's economic growth in 2026-27 (FY27) is projected to exceed 7 per cent under the new gross domestic product (GDP) series, supported by a continued push in government capital expenditure and steady urban and rural demand, economists said. (BS)

The net goods and services tax (GST) revenue in February rose 7.9 per cent year- on-year to ₹1.61 trillion, excluding GST compensation cess receipts, marking the highest growth rate in the past six months, according to government data released on Sunday. (BS)

At their meeting on Monday, Prime Minister Narendra Modi and his Canadian counterpart Mark Carney are expected to cap their efforts of the past nine months to "reset" ties between the two countries by announcing the formal launching of the negotiations to ink a free-trade agreement by the end of the year. (BS)

Indian companies are now on a much stronger financial footing after a multiyear deleveraging cycle, cleaner balance sheets, lower leverage and improved profitability, said Shaktikanta Das, principal secretary to the Prime Minister, at an event. (BS)

Indian imports of Russian oil will plunge to the lowest level in April, four years after Russia invaded Ukraine in February 2022 which sparked a geopolitical-cum- energy crisis - as refiners seek directions from New Delhi and India's second biggest refinery prepares to shut down, industry sources said. (BS)



# CORPORATE NEWS

Bharti Airtel has announced a collaboration with Google to offer a secure and engaging messaging experience for users in India. Google's Rich Communications Services (RCS) platform and spam filtering will enable Airtel users to experience RCS messaging with high-quality photos and videos, along with interactive elements, while benefiting from enhanced protections that significantly reduce mobile spam and digital fraud.

Brigade Enterprises has launched a residential project Brigade Stellaris in Chennai, with a gross development value of Rs 1,700 crore. The project will be developed on a 5.19-acre prime land parcel.

Niva Bupa Health Insurance Company said that on February 26, 2026, IRDAI issued a Show Cause Notice (SCN), and the company is in the process of submitting its response. The SCN relates to business and operational aspects. IRDAI has also issued a Letter of Advice on certain matters, recommending compliance measures. The company stated that there is no impact on its financial, operational, or other activities at this stage.

Eleganz Interiors has received an order worth Rs 122.02 crore from Global Information Technology Organisation for the supply, installation, and handover of interior fit-out works.

Aurobindo Pharma said that the United States Food and Drug Administration (US FDA) inspected Unit-I, a formulation manufacturing facility of its subsidiary Eugia Pharma Specialities, located in Ranga Reddy, Telangana, from February 16 to February 27. The inspection concluded with four observations.

Bharti Airtel will broadly spend ₹30,000 crore as capex for India and ₹9,000 crore (\$1 billion) for Africa. It would also raise investments in data centres, going well past 1 gigawatt (Gw) capacity, Sunil Mittal, Bharti Enterprises chairman and promoter of Bharti Airtel, said in a call with investors last week.

Ola Electric on Sunday launched 'Ola Insiders', an exclusive community programme for its existing customer base of over 10 lakh riders across the country. The initiative unlocks a host of benefits for the community members, including vehicle upgrade, add-on and referrals.

## BULK DEAL

- \*Vishal Mega Mart Limited: Government Of Singapore Buy 126931518 Shares @ Rs. 117
- \*Aditya Birla Capital Ltd.: Bnp Paribas Financial Markets Sell 30609786 Shares @ Rs. 344.5
- \*Vishal Mega Mart Limited: Monetary Authority Of Singapore Buy 73298482 Shares @ Rs. 117
- \*Au Small Finance Bank Ltd: Bnp Paribas Financial Markets Sell 8313171 Shares @ Rs. 958.42
- \*Vishal Mega Mart Limited: Hdfc Mutual Fund Buy 56080000 Shares @ Rs. 117
- \*L&T Finance Limited: Bnp Paribas Financial Markets Sell 21458875 Shares @ Rs. 283.91
- \*Vishal Mega Mart Limited: Hdfc Mutual Fund Buy 37978023 Shares @ Rs. 117
- \*Indian Rail Tour Corp Ltd: Bnp Paribas Financial Markets Buy 4733064 Shares @ Rs. 569.91
- \*Jubilant Foodworks Limite: Bnp Paribas Financial Markets Buy 4950250 Shares @ Rs. 519.67
- \*Gaudium Ivf N Women H L: Neomile India Opportunity Fund Sell 1576910 Shares @ Rs. 84.89
- \*Gaudium Ivf N Women H L: Minerva Emerging Opportunities Fund Limited Sell 1000000 Shares @ Rs. 83
- \*Ashapura Minechem Ltd: Bnp Paribas Financial Markets Buy 2336 Shares @ Rs. 535.94
- \*Aditya Birla Capital Ltd.: Bnp Paribas Financial Markets Buy 976 Shares @ Rs. 345.27
- \*Au Small Finance Bank Ltd: Bnp Paribas Financial Markets Buy 329 Shares @ Rs. 963.46
- \*L&T Finance Limited: Bnp Paribas Financial Markets Buy 1090 Shares @ Rs. 285.94
- \*Msafe: Navbharat Investment Opportunities Fund Buy 121000 Shares @ Rs. 129.35



# INSIDER TRADE

## ACQUISITION

- \* Affle 3I Ltd: Anuj Kumar, Director, Acquisition 14000 shares on 26-Feb-26
- \* Som Distilleries & Breweries Ltd: DEEPAK ARORA, Promoter, Acquisition 10000 shares on 25-Feb-26
- \* La Opala Rg Ltd: GENESIS EXPORTS PRIVATE LIMITED, Promoter, Acquisition 18000 shares on 26-Feb-26
- \* Ncc Ltd: A V S R Holdings Private Limited, Promoter, Acquisition 220781 shares on 25-Feb-26
- \* Senco Gold Ltd: Kumar Shankar Datta, Director, Acquisition 5000 shares on 25-Feb-26
- \* Jindal Stainless Ltd: JSL OVERSEAS HOLDING LIMITED, Promoter Group, Acquisition 900123 shares on 24-Feb-26
- \* Ncl Industries Ltd: NCL HOLDINGS A&S LTD, Promoter Group, Acquisition 4292 shares on 25-Feb-26
- \* Orient Bell Ltd: Promoter, Acquisition 8709 shares
- \* Nahar Spinning Mills Ltd: NAHAR CAPITAL AND FINANCIAL SERVICES LIMITED, Promoter Group, Acquisition 20000 shares on 25-Feb-26

## DISPOSAL

- \* Cie Automotive India Ltd: Anil Haridass, Director, Disposal 35271 shares on 26-Feb-26

## PLEDGE

- \* Camlin Fine Sciences Ltd: Ashish Subhash Dandekar, Promoter & Director, Pledge 1800000 shares on 24-Feb-26

## NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
TEJASNET	435.5	17.4%	HOMEFIRST	1087.0	-7.6%
REDINGTON	276.0	12.9%	VMM	117.9	-7.6%
SARDAEN	550.0	6.0%	LTF	279.6	-6.8%
LTTS	3514.0	5.9%	CGCL	157.9	-5.9%
SUNTV	645.5	5.6%	JKTYRE	500.6	-5.7%
CHENNPETRO	960.6	4.8%	ANGELONE	232.9	-5.5%
SIGNATURE	995.5	4.8%	CREDITACC	1266.8	-5.4%
NETWEB	3872.0	4.7%	ASAHIINDIA	890.7	-5.1%
FINCABLES	912.0	4.4%	RPOWER	24.0	-4.9%
DIXON	10520.0	4.0%	CAMS	674.0	-4.9%

## FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	24,867.72	12,574.91	12,292.81
FII	36,699.66	44,236.02	-7,536.36

Category	27/02/2026	26/02/2026	25/02/2026	24/02/2026	23/02/2026	20/02/2026
DII	12,292.81	5,031.57	5,118.57	3,161.22	-1,292.24	2,637.15
FII	-7,536.36	-3,465.99	2,991.64	-102.53	3,483.70	-934.61

# DERIVATIVE REPORT

- Nifty declined by 1.25% with Nifty future added 20.43 lakh shares in open interest and stock
- Stock future added 1148.2 Lakh shares in open interest.
- Nifty PCR decreased to 0.62 from 0.84
- Total Nifty Calls added 1106.6 lakh shares in open interest.
- Total Nifty Puts added 95.8 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for Mar. series is at 26000 and 25000 put.
- FII's sold net Rs. 7,536.36 Cr (provisional), while DIIs bought net Rs. 12,292.81 Cr in cash market
- FII bought net Rs. 8237.92 Cr in F&O
- Securities in Ban Period: - SAMMAANCAP

## NIFTY TRACKER

	27.02.2026	26.02.2026	25.02.2026	24.02.2026
Spot	25178.65	25496.55	25482.5	25424.65
% Change in Spot	-1.25%	0.06%	0.23%	-1.12%
Nifty(FUT) Mar.	25338.6	25635.8	25628.8	25600.3
Nifty(FUT) Mar. Vol.	91968	60088	88662	112855
Nifty(FUT) Mar. - OI	14250990	13096200	12973155	13404495
Nifty(FUT) Apr.	25499	25793	25791.8	0
Nifty(FUT) Apr. Vol.	12573	3518	5768	0
Nifty(FUT) Apr. - OI	1374035	895895	882440	0

## TRADE STATISTICS FOR 27.02.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	12,41,568	84,32,903	-
Index Options	13,89,23,573	66,81,440	1.14
Stock Options	43,51,620	6,29,260	0.59
Index Futures	1,59,597	27,14,392	-
NSE F&O Total Turnover	14,46,76,358	1,84,57,995	1.12
NSE Cash Turnover		1,44,96,274	
BSE Cash Turnover		8,00,244	
Total Turnover	-	33754513	-

## FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	27/02/2026		26/02/2026		25/02/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-3583	2089	248	308	268	-660
Index option	14873	73083	-2116	49266	-4120	55406
Stock Future	-2527	-3781	-324	4111	1358	5118
Stock option	-525	3746	169	5324	331	8266
Total	8238	75136	-2023	59009	-2163	68130

## MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	27/02/2026	26/02/2026	25/02/2026	24/02/2026	23/02/2026
Index Futures	6838	490	-20886	2583	4336
Index Options	-1027	7634	-42527	4510	2702
Stock Futures	316615	170471	-812738	108189	161604
Stock Options	19979	21048	-201032	-19595	-22077
F&O Total	342404	199642	-1077182.65	95687	146564.81

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDFCFIRSTB	42,07,97,475	43,20,01,675	73.56	0.70%	2.66%
ETERNAL	28,52,57,600	29,48,89,700	247.9	0.02%	3.38%
PETRONET	3,61,70,300	3,89,61,400	324.80	2.06%	7.72%
HCLTECH	2,52,19,950	2,78,84,150	1382.6	0.49%	10.56%
OIL	1,58,62,000	1,71,02,400	488.00	2.47%	7.82%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	93,34,35,400	97,90,59,100	20.74	-1.71%	4.89%
ABCAPITAL	6,26,72,700	8,57,92,500	341.5	-4.38%	36.89%
IDEA	6,81,85,00,575	6,83,82,99,150	10.60	-2.84%	0.29%
LTF	4,88,56,500	6,44,28,750	278.25	-7.27%	31.87%
SAIL	18,25,38,600	19,34,23,800	166.35	-0.10%	5.96%

## NIFTY OPTION OPEN INTEREST STATISTICS

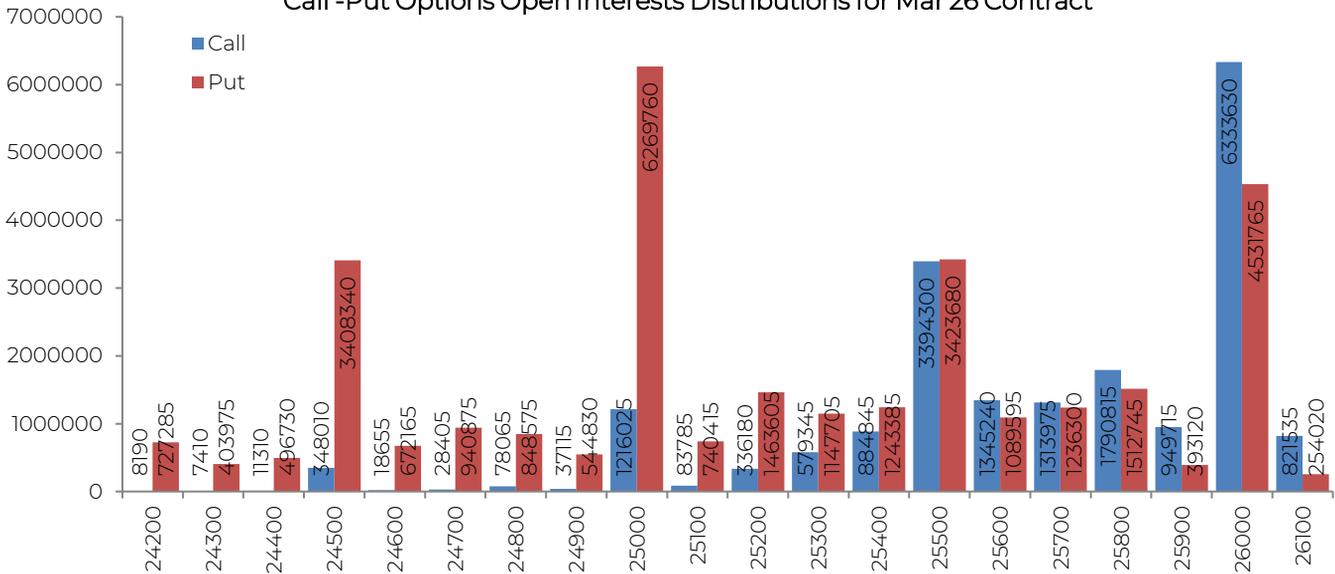
### HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
2-Mar-26	25400	CE	39.3	6721792	13131040	10516155
2-Mar-26	25300	CE	68.05	6738110	10548265	9819225
2-Mar-26	25350	CE	52.65	5371160	7143305	6822920
2-Mar-26	26000	CE	5.2	1858098	16940235	6413485
2-Mar-26	26050	CE	4.85	861233	7175285	5020145
2-Mar-26	25500	CE	23.65	4674650	14716195	4443985
2-Mar-26	25200	CE	110.6	1911651	4620070	4341480
2-Mar-26	26500	CE	2.15	1356661	12247235	4204005
2-Mar-26	25450	CE	30.45	3513760	6651060	4042480
2-Mar-26	26300	CE	2.75	1339384	8883485	3822520

### HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
2-Mar-26	25400	PE	217.7	5962245	2166645	-4536155
2-Mar-26	25500	PE	303.5	2256130	2393950	-4520230
2-Mar-26	25450	PE	257.4	1957921	867685	-2698280
2-Mar-26	25300	PE	146.85	10674747	3294460	-1235780
2-Mar-26	26700	CE	1.65	491575	3202355	-1158430
2-Mar-26	25350	PE	177.6	6029634	1204060	-1116765
2-Mar-26	25600	PE	396.1	571971	1095575	-1103830
2-Mar-26	25550	PE	348.1	381339	621595	-1075490
2-Mar-26	27300	CE	1	136562	876265	-900705
2-Mar-26	26900	CE	1.5	263375	1287325	-838175

Call -Put Options Open Interests Distributions for Mar'26 Contract



## STOCK OPTION OPEN INTEREST STATISTICS

### HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
IDEA	30-Mar-26	10	PE	0.29	998	186692700	18797925
IDEA	30-Mar-26	9	PE	0.09	1018	62183250	9363225
YESBANK	30-Mar-26	21	CE	0.45	1728	67300400	8490300
IDEA	28-Apr-26	10	CE	1.31	120	24587400	6432750
IDEA	30-Mar-26	11	CE	0.46	2427	244658925	5932425
IDEA	28-Apr-26	10	PE	0.54	131	22657575	5360625
YESBANK	30-Mar-26	21	PE	0.65	946	54518300	4602800
IDEA	30-Mar-26	11	PE	0.79	624	196627725	4574400
YESBANK	30-Mar-26	19	PE	0.1	724	23045100	4011900
LTF	30-Mar-26	320	CE	2.1	5412	8284500	3948750

### HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDFCFIRSTB	30-Mar-26	70	CE	5.07	2599	29086400	-6678000
IDEA	30-Mar-26	12	CE	0.2	2744	357803850	-6504225
IDFCFIRSTB	30-Mar-26	60	PE	0.2	2963	40559575	-4878650
IDFCFIRSTB	30-Mar-26	70	PE	1.37	3095	34521550	-3802750
IDFCFIRSTB	30-Mar-26	75	CE	2.29	5761	33612600	-1808625
IDFCFIRSTB	30-Mar-26	62	PE	0.27	421	3403925	-1484000
IDFCFIRSTB	30-Mar-26	72	CE	3.77	1877	8996750	-1446900
IDFCFIRSTB	30-Mar-26	71	CE	4.37	772	5936000	-1279950
IDFCFIRSTB	30-Mar-26	75	PE	3.53	902	11102175	-1252125
HINDZINC	30-Mar-26	530	PE	3.1	2757	345450	-1229900

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