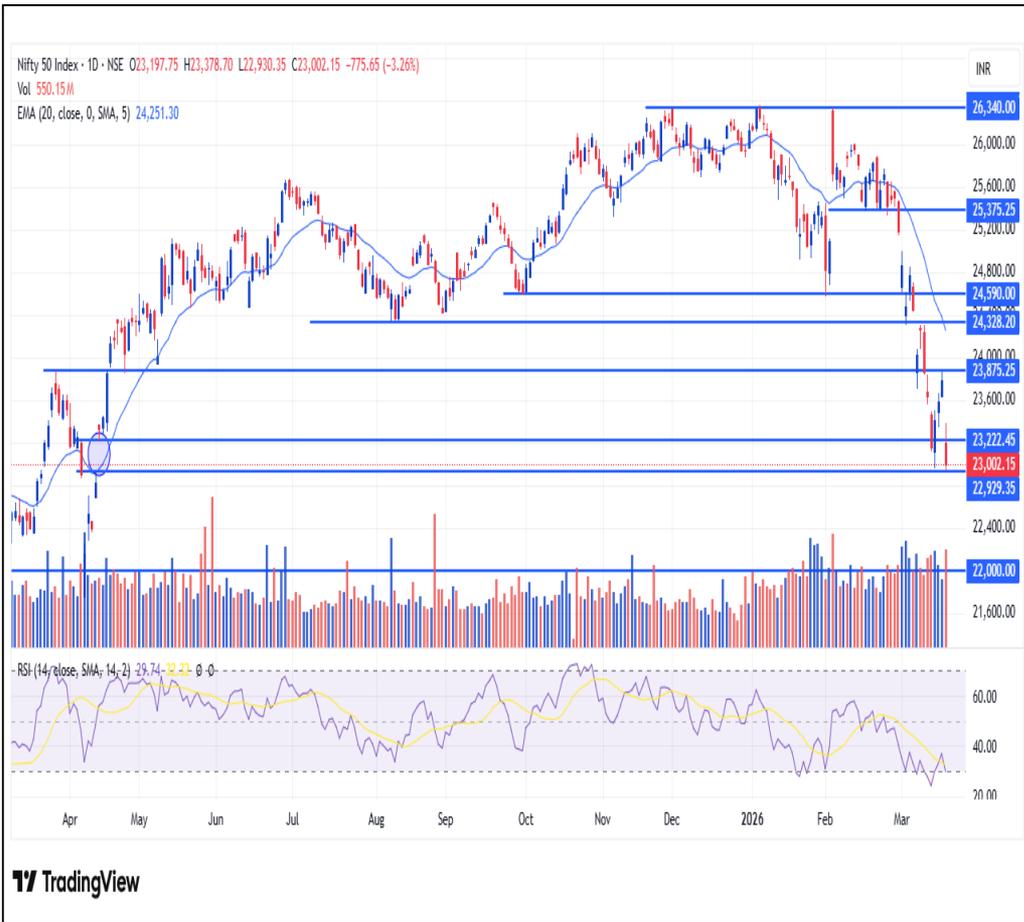


# ITI Morning Boost

March 20, 2026

# NIFTY – 23,777.80 (Daily Chart)



- In Thursday's trading session, the Nifty opened with a huge gap down and remained under pressure throughout the session, resulting in a negative close.
- On a daily scale, the index has formed a bearish candle with an upper wick, indicating selling pressure at higher levels. The index continues to maintain its bearish structure, forming a lower high–lower low pattern. It is also trading below all major DEMAs (50, 100, and 200), which indicates the continuation of bearish momentum. The RSI is approaching the oversold zone, which is a cautious sign for the bulls.
- For Friday's trading session, 22,930 will act as the initial support level, while on the higher end, 23,330 will act as the initial resistance level.



# BANK NIFTY – 53,451.00 (Daily Chart)



• In Thursday's trading session, the banking index opened with a huge gap down and remained in a sideways range for most of the session, resulting in a negative close.

• On a daily scale, the index has formed a Doji candle, which indicates indecisiveness and may signal a possible pause in the ongoing bearish momentum. The RSI is in the oversold zone, which is a cautious sign for the bears. The level of 55,560 will act as a major resistance, and for a reversal in trend, the index needs to sustain above this level.

• For Friday's trading session, 53,225 will act as the initial support level, while on the higher end, 54,160 will act as the initial resistance level.



Balrampur Chini Mills Ltd · 1D · NSE O470.00 H487.45 L470.00 C483.60 +7.65 (+1.61%)  
Vol 809.03 K  
EMA (20, close, 0, SMA, 5) 478.57



# INDIGO CMP- 4,154.30 (Daily Chart)

SELL FUT BELOW 4,135 SL 4,176 TGT 4,050.



**TCS** : TCS signed an MoU with ABB to expand collaboration across IT infrastructure, AI and engineering solutions. The partnership will focus on IT transformation, industrial AI and data centres, aiming to drive innovation and operational efficiency, the company said in a press release.

CMP- 2,356.00  
IMPACT- **POSITIVE**

**NESTLEIND** : The company has added a new 'Munch' production line at its Sanand, Gujarat factory as part of its capacity expansion plans. The company will invest around ₹225 crore through internal accruals, with the new line expected to add an annual production capacity of about 8,300 tonnes and become operational within FY26.

CMP- 1,186.30  
IMPACT- **POSITIVE**

**TATAELXSI** : The company announced the launch of a global offshore development centre (ODC) for Tokyo-based Terumo Corporation to support advanced cardiac and vascular solutions. The centre will focus on engineering, innovation and end-to-end lifecycle management of medical technologies across global markets, helping accelerate product development while ensuring regulatory compliance.

CMP- 4,039.30  
IMPACT- **POSITIVE**

**NTPC** : The company has signed an MoU with Octopus Energy Group to explore strategic collaboration across the power and energy sector. The agreement, signed at the Bharat Electricity Summit 2026, outlines a non-binding framework to pursue opportunities in areas such as power distribution and retail, renewable energy, storage, EV charging, digital platforms, and R&D.

CMP- 374.05  
IMPACT- **POSITIVE**



- India's free trade agreement with the UK is set for early May implementation. The pact with the EU is expected this year. Trade talks with Israel and the Gulf Cooperation Council have slowed. The US-India trade agreement process continues. These deals aim for increased duty-free access for Indian exports.
- The forecast for global trade this year is less optimistic, as the World Trade Organization projects an increase of merely 1.9 percent in merchandise trade. Ongoing tensions in the Middle East could exacerbate these challenges. Last year's growth was markedly influenced by the surge in AI-related goods and a strategic approach to preloading inventory to circumvent tariffs.
- In NITI Aayog report 'Realising the Export Potential of India's Sports Equipment Manufacturing Sector', released on Thursday, the Aayog has proposed a seven-pronged strategy that includes structural reforms and fiscal incentives to the tune of Rs 7500 crore from 2027-2031 to help scale up manufacturing and exports of sports goods and equipment from the country.

## NIFTY50 TOP GAINERS

## NIFTY50 TOP LOSERS

Company	Price	Change	%Gain
ONGC	269.10	4.10	1.55

Company	Price	Change	%Gain
Shriram Finance	949.80	-71.80	-7.03
Eternal	228.74	-13.80	-5.69
Bajaj Finance	832.20	-47.90	-5.44
HDFC Bank	798.20	-44.85	-5.32
M&M	3,045.40	-169.20	-5.26

## NIFTY200 TOP GAINERS

## NIFTY200 TOP LOSERS

Company	Price	Change	%Gain
Adani Gas	556.15	40.50	7.85
ONGC	269.10	4.10	1.55
Oil India Ltd	477.05	6.60	1.40
NTPCGREEN	98.88	1.03	1.05

Company	Price	Change	%Gain
M&M Financial	311.50	-9.90	-3.08
Shriram Finance	949.80	-71.81	-7.03
HPCL	324.80	-24.55	-7.03
Hindustan Zinc	506.15	-31.45	-5.85
BPCL	286.00	-17.70	-5.83



## OPEN INTEREST GAINERS

## OPEN INTEREST LOSERS

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
POLICYBZR	1,488.20	-47.90	-3.12%	8,157	10.17%
COALINDIA	454.85	-0.65	-0.14%	46,822.10	6.69%
DIXON	10,136.00	-578	-5.39%	2,616.70	5.28%
PETRONET	270.95	-20.75	-7.11%	27,736.20	5.07%
LTF	255.40	-12.25	-4.58%	57,915	5.02%

Symbol	Price	Change	Change%	Open Interest ('000)	Open Int Chg %
ADANIENSOL	1,005.80	-33.50	-3.22%	14,786.60	-16.56%
ADANIGREEN	854.65	-38.45	-4.31%	17,713.20	-12.32%
360ONE	1,039.40	-31.10	-2.91%	2,586.50	-8.96%
TATASTEEL	190.67	-4.56	-2.34%	1,55,149.50	-8.39%
GLENMARK	2,095.20	-92.80	-4.24%	10,783.50	-6.83%

## INDEX HIGHEST OI

F&O Ban list	Monthly exp	Indices	Highest CE strike	Highest PE strike	PCR OI
SAIL	30/03/26	NIFTY	26,000	19,000	1.08
SAMMAANCAP	30/03/26	BANKNIFTY	59,000	51,000	0.79



## FII & DII TRADING ACTIVITY CASH

Date	FII Rs Crores			DII Rs Crores		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	1,60,567.23	2,34,271.54	-73,704.31	2,40,852.28	1,49,253.87	91,598.41
19-Mar-26	10,012.07	17,570.26	-7,558.19	16,926.98	13,063.02	3,863.96
18-Mar-26	12,798.80	15,513.15	-2,714.35	16,105.20	12,852.17	3,253.03
17-Mar-26	11,903.71	16,644.93	-4,741.22	16,762.65	11,537.33	5,225.32
16-Mar-26	11,566.51	20,932.03	-9,365.52	25,150.41	12,557.05	12,593.36

## FII & DII TRADING ACTIVITY STOCK F&O

Date	FII Stock Fut			FII Stock Opt		
	Gross Purchase	Gross Sales	Net Purchase / Sales	Gross Purchase	Gross Sales	Net Purchase / Sales
Month till date	2,80,977.41	2,86,845.60	-5,868.19	2,41,884.47	2,43,340.33	-1,455.86
19-Mar-26	23,249.37	30,233.30	-6,983.93	28,717.25	28,319.97	397.28
18-Mar-26	19,972.63	22,216.17	-2,243.54	24,982.58	25,132.91	-150.33
17-Mar-26	21,589.10	22,283.97	-694.87	22,718.07	22,903.68	-185.61
16-Mar-26	23,545.78	22,989.69	556.09	22,431.03	22,880.20	-449.17



## TOP SECTORS PERFORMANCE OF THE DAY

Name	Daily (%)	1 Week (%)	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%)
Crude Oil & Natural Gas	-0.25	-1.07	-3.48	3.31	-11.68	-2.17
Oil Drill/Allied	-0.37	-6.94	-1.83	-6.77	-12.29	2.09
Credit Rating Agencies	-0.59	-4.3	-8.53	-7.01	-13.92	10.34
Real Estate Investment Trusts	-0.62	-0.54	-4.73	-2.77	1.01	17.44
Infrastructure Investment Trusts	-0.65	-0.33	-0.78	-1.94	-3.53	7.31



# UPCOMING ECONOMIC EVENTS

Friday, 20 March 2026	Country	Event's	Forecast		Previous
17:00	IN	FX Reserves, USD			716.81B
Saturday, 21 March 2026					
20:00	US	Fed Chair Powell Speaks			
Tuesday, 24 March 2026					
10:30	IN	S&P Global Services PMI (Mar)			58.1
10:30	IN	S&P Global Manufacturing PMI (Mar)			56.9
19:15	US	S&P Global Manufacturing PMI (Mar)			51.6
19:15	US	S&P Global Services PMI (Mar)			51.7
Wednesday, 25 March 2026					
12:30	UK	CPI (YoY) (Feb)			3.0%
20:00	US	Crude Oil Inventories			6.156M

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