Daily Updates

Market Commentary

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Overnight global action:

On 27th August 2026, US markets ended higher, with the S&P 500 gaining 55.1 pts (+0.72%), Dow Jones advancing by 104.7 pts (+0.20%) and Nasdaq 100 rising by 417.0 pts (+1.43%). Gift Nifty gained 10.5 pts (+0.04%), indicating a largely flat to mildly positive opening for Indian markets.

NSE breadth remained negative with 1,340 advances against 2,159 declines, while BSE witnessed 1,779 advances versus 2,557 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,300 Calls and 24,000 Puts. PCR stands at 0.82.
Sensex OI peaks at 77,000 Calls and 76,900 Puts. PCR stands at 0.73.
Bank Nifty Call and Put OI both peak at 57,500 — heavy ATM congestion zone. PCR stands at 1.10

Securities in Ban for F&O Trade:

SAIL, LICHSGFIN

Sector Performance:

NIFTY SMLCAP 50 index grew by 0.09 % driven by WOCKPHARMA(+4.72%), WELCORP(+4.30%) and DELHIVERY(+3.79%).

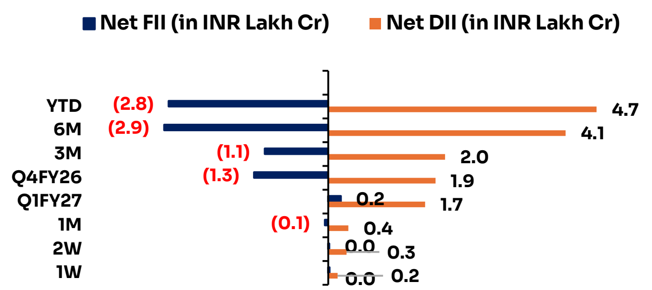
NIFTY MID SELECT 25 index grew by 0.01 % driven by BHEL(+4.44%), BHARATFORG(+2.24%) and PERSISTENT(+1.14%).

NIFTY 100 index declined by -0.43 % driven by TATAPOWER(-3.30%), HDFCAMC(-3.48%) and MUTHOOTFIN(-3.80%).

NIFTY 50 index declined by -0.48 % driven by M&M(-2.01%), HDFCBANK (-2.23%) and HINDALCO(-2.75%).

NIFTY 200 index declined by -0.36 % driven by MUTHOOTFIN(-3.80%), ICICIAMC(-4.03%) and CONCOR(-4.63%).

Fund Flow 27th Aug	Buy	Sell	Net
FII/FPI (INR Cr)	15,276.9	15,575.2	-298.3
DII (INR Cr)	19,605.6	14,628.4	4,977.2



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,211	0.0%	-7.9%	21.9
Sensex 30	76,934	-0.7%	-9.7%	20.1
Nifty 50	24,091	-0.5%	-7.8%	21.8
India VIX	11	5.7%	17.8%	
Nifty Bank	57,510	-0.5%	-3.5%	16.9
Nifty Next 50	74,347	-0.2%	7.2%	74.3
Nifty 500	23,482	-0.3%	-1.6%	22.0
Nifty Mid 100	64,035	-0.1%	5.9%	32.9
Nifty Small 250	18,433	-0.1%	10.5%	31.0
USD/INR	95.5	0.0%	6.2%	
India 10Y	6.9%			
India 2Y	6.0%			
India 1Y	5.8%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,731	0.7%	12.9%	33.5
Dow Jones	53,569	0.2%	11.5%	25.9
Nasdaq 100	29,642	1.4%	17.4%	48.7
FTSE 100	10,793	-0.8%	8.7%	17.0
CAC 40	8,320	-1.7%	2.1%	24.4
DAX	26,367	0.3%	7.7%	27.5
Nikkei 225	66,399	0.4%	31.5%	35.4
Hang Seng	25,566	-0.3%	-0.3%	12.4
Shanghai Comp	3,957	1.1%	-0.3%	17.9
KOSPI	6,863	-0.7%	62.5%	34.0
S&P/ASX 200	9,061	0.3%	3.9%	23.9

Stocks in the News

HERO MOTOCORP (CMP: 5550, MARKET CAP: 111078 Cr., SECTOR: TWO-WHEELERS)

NSE filing

Hero MotoCorp approved an investment of up to INR 1,758 crore to purchase additional Ather Energy shares from an existing shareholder. Its fully diluted holding will increase from 29.88% to approximately 32.8%, with completion targeted by September 3, 2026. Ather reported FY26 turnover of INR 3,671.76 crore versus INR 2,255 crore in FY25.

TEJAS NETWORKS (CMP: 511, MARKET CAP: 9097 Cr., SECTOR: TELECOM EQUIPMENT)

NSE filing

Tejas Networks received a INR 1,537 crore Letter of Intent from TCS for supplying RAN equipment, accessories and installation materials for BSNL's 4G network across 18,685 sites. The contract value exceeds Tejas' FY26 revenue of approximately INR 1,103 crore, making it financially significant. TCS will issue the detailed purchase order subsequently; the execution timeline was not disclosed.

ACME SOLAR HOLDINGS (CMP: 386, MARKET CAP: 27307 Cr., SECTOR: RENEWABLE POWER)

NSE filing

ACME Solar secured INR 1,571 crore of 19-year project funding from IIFCL for a 300 MW assured-peak-power project carrying total capex of INR 2,123 crore. The project has a 25-year SECI PPA at INR 6.28 per unit and will integrate 1,350 MWh of battery storage. Separately, ACME commissioned 15 MW/240.75 MWh of BESS capacity, taking the relevant project to 300 MW/1,354.22 MWh.

SKIPPER LIMITED (CMP: 558, MARKET CAP: 6303 Cr., SECTOR: POWER T&D EQUIPMENT)

NSE filing

Skipper secured INR 1,305 crore of new domestic and export transmission and distribution orders, equivalent to approximately 23.5% of FY26 revenue. The wins include transmission towers and monopoles for North American projects and two 765 kV transmission-line projects from a domestic developer. Customer identities, individual contract values and execution timelines were not disclosed.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	28,884	-0.4%	2.5%	23.8
Nifty IT	30,221	-0.3%	-20.2%	23.6
Nifty Fin Ser	26,281	-0.4%	-4.8%	17.2
Nifty Pharma	26,849	0.8%	18.2%	44.2
Nifty Services	30,750	-0.5%	-8.6%	33.8
Nifty Cons Dur	40,738	0.7%	10.8%	55.2
Nifty PSE	9,702	-0.3%	-1.5%	10.2
Nifty FMCG	47,030	-0.5%	-15.2%	32.4
Nifty Pvt Bank	27,759	0.1%	-3.4%	10.4
Nifty PSU Bank	8,588	-0.9%	0.6%	14.1
Nifty Cons	11,921	-0.4%	-3.0%	42.1
Nifty Energy	38,104	0.0%	7.9%	12.1
Nifty Health	16,708	0.7%	14.1%	40.0
Nifty India Mfg	16,560	-0.1%	7.4%	30.8
Nifty Metal	13,425	-0.9%	20.2%	24.1
Nifty Oil & Gas	11,061	-0.8%	-9.6%	16.9

Derivatives Position (Combined)		
Stock	**% Chg OI**	**%Chg LTP**
Long		
ATHERENERG	65.4	0.3
LICHSGFIN	12.3	2.0
ZYDUSLIFE	6.9	3.6
GVT&D	6.0	0.6
ADANIPOWER	5.9	3.9
Short		
NIFTY	6.2	-0.6
BANKNIFTY	0.1	-0.6
SAGILITY	60.2	-0.3
HDFCAMC	9.2	-3.7
MAHABANK	8.8	-1.4
Long Unwinding		
POLICYBZR	-3.6	-0.3
NAM-INDIA	-3.6	-1.7
HINDZINC	-3.3	-2.6
PAYTM	-3.2	-1.1
BPCL	-2.8	-0.2
Short Covering		
CGPOWER	-4.0	3.2
ADANIENSOL	-3.2	1.3
NYKAA	-2.8	0.3
OBEROIRLTY	-2.1	0.5
COFORGE	-1.9	0.6

HINDALCO INDUSTRIES (CMP: 1024, MARKET CAP: 230116 Cr., SECTOR: NON-FERROUS METALS)

NSE filing

Hindalco commissioned India's first Superfine Precipitated Aluminium Trihydrate plant in Belagavi with 30,000 tonnes of annual capacity, designed for expansion to 60,000 tonnes. Phase 1 is expected to meet almost the entire domestic requirement for the flame-retardant material used in HFFR cables, EVs, polymer insulators and thermal insulation. The plant operates entirely on renewable power; project capex and revenue potential were not disclosed.

Commodities	CMP	1D	YTD
Gold ($)	4,601	-0.03%	6.6%
Silver ($)	69.3	0.2%	-4.2%

Currency	CMP	1D	YTD
USD/INR	95.5	0.00%	6.21%
EUR/INR	111.3	0.00%	5.32%
GBP/INR	129.8	0.01%	7.19%
JPY/INR	0.6	0.02%	4.43%
EUR/USD	1.2	0.01%	-0.83%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
IREDA	117.40	110.52	5.86
JUBLFOOD	504.00	490.50	2.68
DIXON	14,711.00	14,370.00	2.32
PREMIERENE	1,000.00	977.20	2.28
LODHA	1,246.30	1,221.60	1.98

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
TITAN	5,139	5,187	5,168	11-Aug-26
JSWSTEEL	1,338	1,351	1,341	26-Aug-26
DIVISLAB	9,060	9,150	9,043	26-Aug-26
SOLARINDS	20,580	20,649	20,422	18-Aug-26
GLENMARK	2,460	2,484	2,474	29-Apr-26

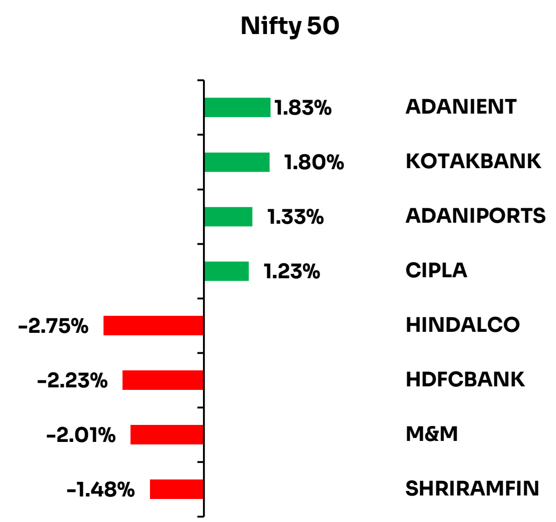
52 Week Low

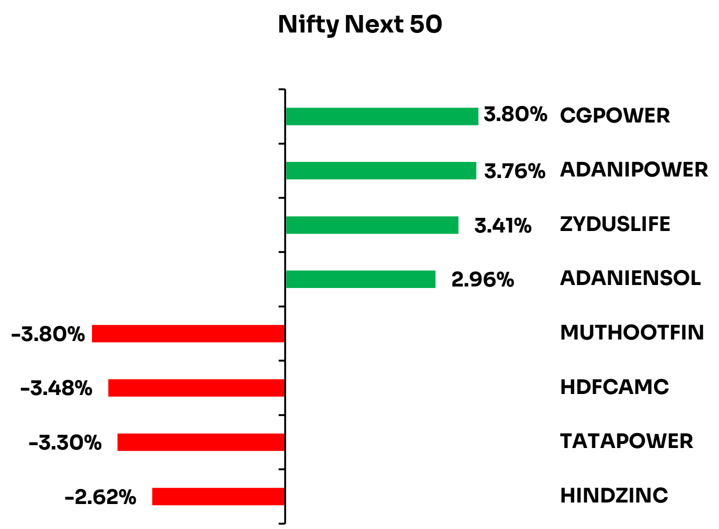
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
HDFCBANK	711	710	715	19-Aug-26
HINDUNILVR	2,009	2,004	2,006	24-Aug-26
IRFC	85	85	85	19-Aug-26
DABUR	386	386	392	25-Aug-26
RVNL	216	215	217	25-Aug-26

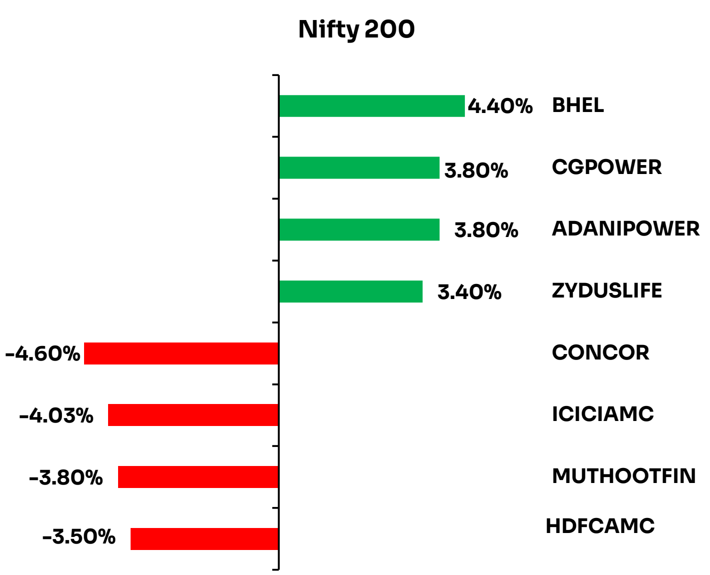
Volume Shockers

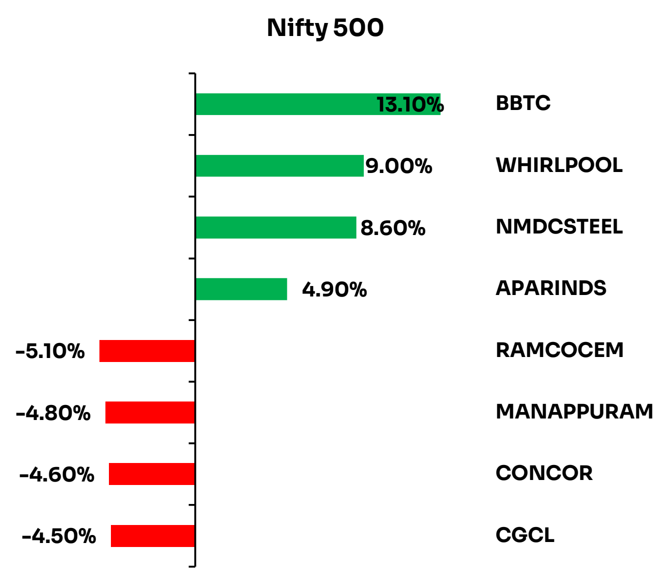
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
GSEC10ADD	1,650	0	0	27
BBTC	14,320	25	33	1,592
BANK10ADD	7,163	22	37	17
VISACHROME	4,086	18	18	38
FOSECOIND	1,201	13	12	6,100
INOXINDIA	4,485	104	103	2,160
IMAGICAA	34,243	949	722	60
WEL	129,567	3,837	2,562	125
KELLTONTEC	58,183	1,736	1,464	15
BOMDYEING	12,306	373	394	117
MOSCHIP	17,474	727	965	218
BANARBEADS	56	2	2	118
WHIRLPOOL	5,453	233	205	844
GROWWPSE	55	2	4	98
AYE	13,672	636	674	183
ROSSELLIND	2,433	113	72	57
NSLNISP	86,668	4,053	6,388	45
MVELECTRO	14,689	698	998	641
ALOKINDS	60,005	3,403	2,963	11
NIRAJISPAT	1	0	0	237
TRAVELFOOD	538	32	60	1,332
APOLLOTYRE	27,548	1,778	1,121	444
RAMRAT	3,785	259	283	570
NGIL	124	9	39	42
GKENERGY	5,842	430	391	139

Top Gainers & Losers









Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AASTHA	JAGID VANITABEN RAJENDRAPRASAD	BUY	482	88
AASTHA	JAGID VANITABEN RAJENDRAPRASAD	SELL	551	88
AASTHA	L7 HITECH PRIVATE LIMITED	BUY	865	88
AASTHA	L7 HITECH PRIVATE LIMITED	SELL	1029	88
AMBAAUTO	GOMOTO TEXTILES PRIVATE LIMITED	BUY	115	115
APOLLOTYRE	EMERALD SAGE INVESTMENT LTD	SELL	27010	435
APOLLOTYRE	ICICI PRUDENTIAL MUTUAL FUND	BUY	19080	435
APOLLOTYRE	SBI LIFE INSURANCE COMPANY LIMITED	BUY	5632	435
AQYLON	SERA INVESTMENTS & FINANCE INDIA LIMITED	SELL	1841	25
ASIANTILES	THAKKAR NILESHKUMAR FARSHURAM HUF	BUY	1735	47
ATALREAL	ACME CAPITAL MARKET LIMITED	SELL	1855	36
ATALREAL	ACME CAPITAL MARKET LIMITED	BUY	1855	35
ATALREAL	ALTIZEN VENTURES LLP	SELL	500	35
ATALREAL	ALTIZEN VENTURES LLP	BUY	813	35
ATALREAL	BULLPULSE MARKETEDGE PRIVATE LIMITED	SELL	1000	36
ATALREAL	BULLPULSE MARKETEDGE PRIVATE LIMITED	BUY	1000	36
ATALREAL	CHAUBARA EATS PRIVATE LIMITED	SELL	1240	36
ATALREAL	CHAUBARA EATS PRIVATE LIMITED	BUY	1240	36
ATALREAL	HRTI PRIVATE LIMITED	SELL	724	35
ATALREAL	HRTI PRIVATE LIMITED	BUY	1368	36
ATALREAL	JIAUM BROKING LLP	BUY	1000	36
ATALREAL	JIAUM BROKING LLP	SELL	1000	36
ATALREAL	MAHESH MULCHAND WAGHELA	SELL	1782	35
ATALREAL	MAHESH MULCHAND WAGHELA	BUY	1975	35
AYE	F3 ADVISORS PRIVATE LIMITED	BUY	178	176
AYE	F3 ADVISORS PRIVATE LIMITED	SELL	1545	177
BANG	IRAGE BROKING SERVICES LLP	SELL	20	35
BANG	IRAGE BROKING SERVICES LLP	BUY	124	34
BANG	ORION STOCKS LTD	BUY	17	35
BANG	ORION STOCKS LTD	SELL	165	34
BBTC	BLITZQUANT RESEARCH LLP	SELL	376	1607
BBTC	BLITZQUANT RESEARCH LLP	BUY	376	1606
BBTC	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	449	1614
BBTC	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	449	1614
BBTC	MICROCURVES TRADING PRIVATE LIMITED	BUY	795	1614
BBTC	MICROCURVES TRADING PRIVATE LIMITED	SELL	795	1615
BBTC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	620	1610
BBTC	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	620	1609
BIOFILCHEM	ORION STOCKS LTD	BUY	4	33
BIOFILCHEM	ORION STOCKS LTD	SELL	90	33
BLEL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	219	470
BLEL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	220	471
BVCL	IRAGE BROKING SERVICES LLP	SELL	4	44
BVCL	IRAGE BROKING SERVICES LLP	BUY	121	44
BVCL	ORION STOCKS LTD	BUY	42	44

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
BVCL	ORION STOCKS LTD	SELL	179	44
DCBBANK	OMAN INDIA JOINT INVESTMENT FUND II	SELL	3700	217
DIGIKORE	ROHIT KISHOR RATHI	SELL	125	33
FOSECOIND	CATAMARAN VENTURES LLP	BUY	56	5897
FOSECOIND	CITIGROUP GLOBAL MARKETS SINGAPORE PTE	BUY	43	5897
FOSECOIND	INVESCO MUTUAL FUND	BUY	254	5897
FOSECOIND	LIC MUTUAL FUND	BUY	43	5897
FOSECOIND	MAHINDRA MANULIFE MUTUAL FUND	BUY	56	5897
FOSECOIND	MIRAE ASSET MUTUAL FUND	BUY	292	5897
FOSECOIND	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	43	5897
FOSECOIND	MORGAN TERRASSEN B V	SELL	560	5897
FOSECOIND	MORGANITE CRUCIBLE LIMITED	SELL	591	5897
FOSECOIND	MOTILAL OSWAL MUTUAL FUND	BUY	43	5897
FOSECOIND	SBI MUTUAL FUND	BUY	322	5897
GANGAFORGE	NEO APEX SHARE BROKING SERVICES LLP	SELL	1953	2
GATECH	AL MAHA INVESTMENT FUND PCC - ONYX STRATEGY	SELL	27500	1
GATECH	MGO HIGH CONVICTION FUND INCORPORATED	SELL	11774	1
GATECH	MINERVA VENTURES FUND	SELL	22500	1
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	208	541
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	314	538
HAPPSTMNDS	POLUNIN EMERGING MARKETS SMALL CAP FUND LLC	BUY	830	430
IRISDOREME	NIPPON LIFE INDIA ASSET MANAGEMENT LIMITED	BUY	1154	57
KELLTONTEC	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2976	15
KELLTONTEC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2976	15
KELLTONTEC	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	3031	15
KELLTONTEC	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	3031	15
KHADIM	PANKAJ PRASOON AND (HUF)	BUY	140	111
KSHITIJ-RE	SRIHARSHA POLAVARAPU	BUY	400	0
KSHITIJ-RE	SUBHASH CHANDRA	BUY	800	0
MARSONS	ACME CAPITAL MARKET LIMITED	BUY	940	125
MARSONS	ACME CAPITAL MARKET LIMITED	SELL	940	125
MILKYMIST	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	4205	223
MILKYMIST	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	4207	224
MODIS	SHRENI SHARES PVT	BUY	6	396
MODIS	SHRENI SHARES PVT	SELL	106	384
MVELECTRO	ALROX ENTERPRISES PRIVATE LIMITED	BUY	200	649
MVELECTRO	HRTI PRIVATE LIMITED	SELL	521	633
MVELECTRO	HRTI PRIVATE LIMITED	BUY	533	635
MVELECTRO	IRAGE BROKING SERVICES LLP	SELL	206	641
MVELECTRO	IRAGE BROKING SERVICES LLP	BUY	211	641
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	190	640
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	190	641
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	545	637
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	547	637
MVELECTRO	MATHISYS QUANTCAP LLP	SELL	227	635

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
MVELECTRO	MATHISYS QUANTCAP LLP	BUY	230	636
MVELECTRO	MICROCURVES TRADING PRIVATE LIMITED	BUY	802	641
MVELECTRO	MICROCURVES TRADING PRIVATE LIMITED	SELL	802	642
MVELECTRO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	279	639
MVELECTRO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	279	639
MVELECTRO	QE SECURITIES LLP	BUY	472	641
MVELECTRO	QE SECURITIES LLP	SELL	491	637
MVELECTRO	SILVER LINE VENTURES PRIVATE LIMITED	BUY	134	651
MVELECTRO	SILVER LINE VENTURES PRIVATE LIMITED	SELL	151	655
PARSVNATH	EARC TRUST SC 453	SELL	4934	1
PCJEWELLER	ALGOQUANT FINTECH LIMITED	SELL	61869	11
PCJEWELLER	ALGOQUANT FINTECH LIMITED	BUY	61869	11
QUESTLAB	BHAVNA HITESH PATEL	SELL	100	88
QUESTLAB	INVICTO MULTIPLIER FUND	BUY	170	88
RAMBHAJO	HRTI PRIVATE LIMITED	BUY	734	261
RAMBHAJO	HRTI PRIVATE LIMITED	SELL	758	260
RAMBHAJO	IRAGE BROKING SERVICES LLP	SELL	248	264
RAMBHAJO	IRAGE BROKING SERVICES LLP	BUY	263	263
RAMBHAJO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	986	262
RAMBHAJO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	987	262
RAMBHAJO	MARWADI SHARES AND FINANCE LTD.	SELL	386	261
RAMBHAJO	MARWADI SHARES AND FINANCE LTD.	BUY	386	263
RAMBHAJO	MICROCURVES TRADING PRIVATE LIMITED	SELL	542	267
RAMBHAJO	MICROCURVES TRADING PRIVATE LIMITED	BUY	542	267
RAMBHAJO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	583	264
RAMBHAJO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	583	264
RAMBHAJO	QE SECURITIES LLP	BUY	642	261
RAMBHAJO	QE SECURITIES LLP	SELL	655	259
RAMBHAJO	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	295	260
RAMBHAJO	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	295	260
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1237	291
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1255	290
RATNAVEER	HRTI PRIVATE LIMITED	SELL	400	289
RATNAVEER	HRTI PRIVATE LIMITED	BUY	454	290
RGL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	712	140
RGL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	713	140
RGL	QE SECURITIES LLP	SELL	635	141
RGL	QE SECURITIES LLP	BUY	671	139
RPPINFRA	CMK PROJECTS PRIVATE LIMITED	BUY	500	57
RPPINFRA	YAGAVI N A *	SELL	500	57
RULKA	GRATIAS VENTURES PRIVATE LIMITED	BUY	8	112
RULKA	GRATIAS VENTURES PRIVATE LIMITED	SELL	21	112
SAWALIYA	PATEL JATINKUMAR	BUY	1	270
SAWALIYA	PATEL JATINKUMAR	SELL	50	220
SHAH	DHANJIT REAL TRADE LLP	SELL	7381	4

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SHAH	DHANJIT REAL TRADE LLP	BUY	8381	4
SHANTIGOLD	ARIHANT CAPITAL MARKETS LIMITED	SELL	1256	249
SHANTIGOLD	ARIHANT CAPITAL MARKETS LIMITED	BUY	1256	247
SHANTIGOLD	HRTI PRIVATE LIMITED	SELL	517	248
SHANTIGOLD	HRTI PRIVATE LIMITED	BUY	566	248
SHANTIGOLD	NOVA GLOBAL OPPORTUNITIES FUND PCC - TOUCHSTO	SELL	465	250
SHANTIGOLD	QE SECURITIES LLP	SELL	400	249
SHANTIGOLD	QE SECURITIES LLP	BUY	448	248
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	425	371
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	451	370
TECHNOCRAF	HRTI PRIVATE LIMITED	BUY	277	360
TECHNOCRAF	HRTI PRIVATE LIMITED	SELL	281	359
TECHNOCRAF	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	308	363
TECHNOCRAF	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	309	363
VISACHROME	AL MAHA INVESTMENT FUND PCC - ONYX STRATEGY	BUY	4054	37
VISACHROME	ASSETS CARE AND RECONSTRUCTION ENTERPRISE	SELL	4058	37
WEL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1347	164
WEL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1347	164
WEL	CLT RESEARCH TECH PRIVATE LTD	SELL	1064	163
WEL	CLT RESEARCH TECH PRIVATE LTD	BUY	1064	163
WEL	CORE INC	SELL	1945	148
WEL	CORE INC	BUY	1945	141
WEL	D3 STOCK VISION LLP	SELL	1413	128
WEL	D3 STOCK VISION LLP	BUY	1978	127
WEL	GRT STRATEGIC VENTURES LLP	BUY	769	151
WEL	GRT STRATEGIC VENTURES LLP	SELL	769	151
WEL	HRTI PRIVATE LIMITED	SELL	2625	153
WEL	HRTI PRIVATE LIMITED	BUY	2693	150
WEL	IRAGE BROKING SERVICES LLP	BUY	1711	146
WEL	IRAGE BROKING SERVICES LLP	SELL	2103	143
WEL	J4S FINANCIAL SOLUTIONS LLP	SELL	1060	153
WEL	J4S FINANCIAL SOLUTIONS LLP	BUY	1060	153
WEL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	4409	155
WEL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	4628	153
WEL	MARWADI CHANDARANA INTERMEDIARIES BROKERS	SELL	970	138
WEL	MARWADI CHANDARANA INTERMEDIARIES BROKERS	BUY	974	142
WEL	MARWADI SHARES AND FINANCE LTD.	SELL	11251	131
WEL	MARWADI SHARES AND FINANCE LTD.	BUY	11281	132
WEL	MATHISYS QUANTCAP LLP	BUY	806	156
WEL	MATHISYS QUANTCAP LLP	SELL	806	155
WEL	MICROCURVES TRADING PRIVATE LIMITED	SELL	6100	161
WEL	MICROCURVES TRADING PRIVATE LIMITED	BUY	6100	160
WEL	NEO APEX SHARE BROKING SERVICES LLP	SELL	568	126
WEL	NEO APEX SHARE BROKING SERVICES LLP	BUY	1318	126
WEL	NEO APEX VENTURE LLP	SELL	1150	127

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
WEL	NEO APEX VENTURE LLP	BUY	1638	127
WEL	NEXUS GLOBAL OPPORTUNITIES FUND	SELL	797	139
WEL	NEXUS GLOBAL OPPORTUNITIES FUND	SELL	1040	141
WEL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	5777	145
WEL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	5778	144
WEL	PUMA SECURITIES	BUY	1156	150
WEL	PUMA SECURITIES	SELL	1156	150
WEL	QE SECURITIES LLP	SELL	3856	151
WEL	QE SECURITIES LLP	BUY	3886	153
WEL	SETU SECURITIES PVT LTD	SELL	344	129
WEL	SETU SECURITIES PVT LTD	BUY	1444	126
WEL	UNICO GLOBAL OPPORTUNITIES FUND LIMITED	SELL	5752	126
WEL	VINSUL MAKARDI LTD	BUY	2175	141
WEL	VINSUL MAKARDI LTD	SELL	2175	141
XTRANET	GINNI FINANCE PRIVATE LIMITED	SELL	50	168
XTRANET	GINNI FINANCE PRIVATE LIMITED	BUY	461	159

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
APOLLOTYRE	BAJAJ LIFE INSURANCE LIMITED	BUY	2,298	435
APOLLOTYRE	EMERALD SAGE INVESTMENT LTD	SELL	27,010	435
APOLLOTYRE	ICICI PRUDENTIAL MUTUAL FUND	BUY	19,080	435
APOLLOTYRE	SBI LIFE INSURANCE COMPANY LIMITED	BUY	5,632	435
FOSECOIND	CATAMARAN VENTURES LLP	BUY	56	5,897
FOSECOIND	CITIGROUP GLOBAL MARKETS SINGAPORE PTE LIMITED	BUY	43	5,897
FOSECOIND	INVESCO MUTUAL FUND	BUY	254	5,897
FOSECOIND	LIC MUTUAL FUND	BUY	43	5,897
FOSECOIND	MAHINDRA MANULIFE MUTUAL FUND	BUY	56	5,897
FOSECOIND	MIRAE ASSET MUTUAL FUND	BUY	292	5,897
FOSECOIND	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	43	5,897
FOSECOIND	MORGAN TERRASSEN B V	SELL	560	5,897
FOSECOIND	MORGANITE CRUCIBLE LIMITED	SELL	591	5,897
FOSECOIND	MOTILAL OSWAL MUTUAL FUND	BUY	43	5,897
FOSECOIND	SBI MUTUAL FUND	BUY	322	5,897

Event Calendar – Corporate Action 28th August 2026

Company	Purpose
AION-TECH SOLUTIONS LIMITED	AGM Approval Matters
GSS Infotech Limited	AGM Approval Matters
Max Estates Limited	Fund Raising
One Point One Solutions Limited	Fund Raising/Other business matters

Global Macro Events 28th August 2026

Event	Previous	Forecast
USA		
Goods Trade Balance Adv JUL	$-101.41B	$-100.0B
Initial Jobless Claims AUG/22	207K	210.0K
Retail Inventories Ex Autos MoM Adv JUL	-0.5%	0.00%
Wholesale Inventories MoM Adv JUL	0.3%	0.20%
Continuing Jobless Claims AUG/15	1796K	1811.0K
Jobless Claims 4-week Average AUG/22	204.25K	203.0K
EIA Natural Gas Stocks Change AUG/21	16Bcf	
Kansas Fed Composite Index AUG	9	8
Kansas Fed Manufacturing Index AUG	17	14
4-Week Bill Auction	3.64%	
8-Week Bill Auction	3.66%	
15-Year Mortgage Rate AUG/27	5.95%	
30-Year Mortgage Rate AUG/27	6.65%	
7-Year Note Auction	4.47%	
Fed Balance Sheet AUG/26	$6.746T	
Chicago PMI AUG	57.6	56.1
Non Farm Payrolls Annual Revision Prel	-911K	
Michigan Consumer Sentiment Final AUG	55.2	51
Michigan 5 Year Inflation Expectations Final AUG	3.30%	3.30%
Michigan Consumer Expectations Final AUG	55.4	50.6
Michigan Current Conditions Final AUG	54.8	51.8
Michigan Inflation Expectations Final AUG	4.20%	4.30%
Baker Hughes Oil Rig Count AUG/28	452	
Baker Hughes Total Rigs Count AUG/28	588	
India		
Industrial Production YoY JUL	7.30%	5.70%
Manufacturing Production YoY JUL	7.80%	5.50%
Bank Loan Growth YoY AUG/15	19.30%	
Deposit Growth YoY AUG/15	15.40%	
Foreign Exchange Reserves AUG/21	$716.91B	
M3 Money Supply YoY AUG/15	14.70%	

Global Macro Events 28th August 2026

Event	Previous	Forecast
Germany		
GfK Consumer Confidence SEP	-29.4	-29.5
Import Prices MoM JUL	-0.70%	0.30%
Import Prices YoY JUL	6.10%	7.20%
Unemployed Persons AUG	2.993M	3.0M
Unemployment Change AUG	6K	7.0K
Unemployment Rate AUG	6.40%	6.30%
Great Britain		
Car Production YoY JUL	-1.20%	1.00%
China		
Industrial Profits (YTD) YoY JUL	19%	16%

Daily Updates

Nifty & Bank Spot – Pivot Levels 28/08/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24090.85	24021	23952	23814	24228	24366	24435
Bank Nifty	57509.95	57341	57173	56838	57844	58179	58347

Wockhardt Ltd – Technical Stock Call – 28/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
WOCKPHARMA	BUY	1962	2300	(1931-1901)-1880-(1858-1826)	1792

Sector: Pharmaceuticals (INE049B01025)

About: Wockhardt Limited is one of India's leading research-based pharmaceutical and biotechnology companies, engaged in the discovery, development, manufacturing, and marketing of innovative antibiotics, biopharmaceuticals, insulin, generic formulations, and A ctive Pharmaceutical Ingredients (APIs). The company has a global presence across India, the US, UK, Ireland, and several internati onal markets, with a strong focus on novel drug discovery.

View – Short Term Bullish

The stock commenced its downtrend from 2422.3 (JUN 26).
Forming lower tops, the stock extended its decline & slipped to mark a low of 1820 (JUN 26).
During the correction phase, the stock traded flat into a narrow consolidation range between 1820 – 2067.7 during the JUN 26_AUG 26, trading around the averages seeking trend direction.
However, as observed on the charts, the stock has formed a well-defined base at around 1820 levels, suggesting bounce back & support on each corrective move.
Later, Buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the st ock has given a **Descending Triangle – Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 1987 (AUG 26), which is higher than the previous weeks high.

Indicators like MACD & Stoch RSI suggests positive crossover.
Target of **2300** is expected with lower support levels at **(1931-1901)-1880-(1858-1826)** in case of intermediate fall.
A stop loss at **1792** is to be followed for the trade.
All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Bombay Dyeing & Mfg Company Ltd – Technical Stock Call – 28/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
BOMDYEING	BUY	116.95	232	(111-106)	103

Sector: Real Estate & Textiles (INE032A01023)

About: Bombay Dyeing & Manufacturing Company Limited is one of India's leading real estate and textile companies, engaged in the development of residential and commercial real estate, along with the manufacturing and marketing of home textiles, bed linen , towels, and lifestyle products. The company is part of the renowned Wadia Group and has a strong presence in Mumbai's real estate market.

View – Short Term Bullish

The stock commenced its downtrend from 141 (JUN 26).

Forming lower tops, the stock traded below 200 SMA into a narrow descending channel & further extended its decline to mark a low of 109.21 (AUG 26).

However, as observed on the charts, the stock took support on downward slopping trend line, suggesting bounce back at each co rrective interval.

Buying emerged & the stock commenced its up move & recently, after forming higher bottoms, the stock has given a **Falling Wedge – Reversal Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 121.80 (AUG 26), which is higher than theprevious swing high of 119.20 (AUG 26).

Indicators like MACD & PVT suggests positive crossover.

Target of **232** is expected with lower support levels at **(111-106)** in case of intermediate fall.

A stop loss at **103** is to be followed for the trade.

All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Stock specific news

Great Eastern Shipping: INR 900 Crore Open-Market Buyback
The board approved an open-market share buyback of up to INR 900 crore at a maximum price of INR 1,530 per share. At that ceiling, the company could repurchase approximately 58.82 lakh shares, representing 4.12% of equity. At least INR 675 crore must be deployed, and promoters will not participate.

GNG Electronics: INR 2,420 Crore RPT Ceiling
Proposed FY27 related-party transaction limits total INR 2,420 crore. These include INR 820 crore between GNG and Electronics Bazaar FZC, INR 700 crore with Bright World Technologies, INR 500 crore with Kay Kay Overseas, and personal guarantees of INR 200 crore each from Sharad and Vidhi Khandelwal. The limits require shareholder approval.

GK Energy: INR 454.5 Crore Solar Award
GK Energy received empanelment for 1-kW rooftop systems across one lakh households, equivalent to 100 MW. The estimated contract value is INR 454.50 crore including GST, taking cumulative allocations above INR 1,092 crore. Each work order must be completed within 60 days, followed by five years of operations and maintenance.

Adani Enterprises: INR 535.69 Crore Data-Centre Buyout
AdaniConneX acquired 100% of Chandenvalle Infra Park for INR 535.69 crore. The acquired company has nil turnover and has not commenced operations. AdaniConneX plans to use the entity to establish data-centre infrastructure.

Tata Steel: INR 1,340 Crore Overseas Infusion
Tata Steel invested USD140 million, approximately INR 1,340.16 crore, in wholly owned subsidiary T Steel Holdings. It acquired 162.04 crore additional shares through the transaction. The investment forms part of the previously approved USD2-billion additional funding programme.

IDFC FIRST Bank: Two Investment-Grade Ratings
S&P assigned BBB- to the bank's USD350-million, five-year senior notes, consistent with its BBB-/Stable/A-3 issuer ratings. CareEdge assigned BBB-/Positive to the bank and its USD600-million three-year notes. CareEdge cited Q1 FY27 RoA of 1.06%, gross NPA of 1.5%, and improving profitability.

Gabriel India: INR 1,000 Crore NCD Rating
CRISIL assigned AA+/Stable to Gabriel India's proposed INR 1,000-crore NCDs and reaffirmed the rating on INR 170 crore of bank facilities. Project Jupiter includes a INR 2,231-crore purchase of 28.99% in HL Mando Anand and a USD98.4-million investment for about 30% of HL Klemove India. CRISIL expects INR 1,000–1,200 crore of acquisition debt, with completion targeted during September–October 2026.

Tata Power: 72.5 MW Solar Commissioned
Tata Power Renewable Energy commissioned a 72.5-MW captive solar project at Kalasar, Bikaner, for Tata Steel. The plant is expected to generate 166 million units annually and offset approximately 1,18,856 tonnes of CO_2 each year. It uses 1,71,360 domestically manufactured solar modules.

LIC Housing Finance: Guarantor Recovery Rights Preserved
Media reports cited an admitted claim of INR 1,322.39 crore against personal guarantor Subhash Chandra and a repayment-plan distribution of INR 38.09 lakh to LIC Housing Finance. The lender confirmed that two loan accounts carry Chandra's personal guarantee. Mortgages, security interests, and recovery rights against the principal corporate borrowers remain unaffected by the personal-insolvency order.

Wipro: 10,000 AI Specialists Deployment
Wipro expanded its Google Cloud partnership to deploy Gemini Enterprise across internal and customer-facing operations. More than 10,000 AI-certified specialists, including 1,500 forward-deployed engineers, will use the platform. The companies will apply Wipro's LIFT framework to compliance, HR, sales intelligence, software development and application-modernisation workflows.

Transformers & Rectifiers: £10 Million UK Expansion
The board approved establishing Maxwell Grid Transformers in the UK as a 51%-owned subsidiary. Transformers & Rectifiers may invest up to £10 million in tranches through equity, debt, guarantees, or other instruments. The subsidiary will manufacture, repair, sell, and distribute the company's transformers and related components.

Pritika Auto: 25-Year Solar Savings Deal
Pritika Engineering Components signed a 25-year solar-power MoU with Spark Grid. The group estimates total savings of approximately INR 110 crore, including around INR 70 crore for Pritika Engineering Components and Meeta Castings. Pritika Engineering Components is expected to own 26% of the proposed solar-project SPV.

Milky Mist Dairy: INR 1,747 Crore Facilities Upgraded
CRISIL upgraded ratings on Milky Mist Dairy's INR 1,747-crore bank facilities. The long-term rating moved to A+/Stable from A-/Positive, while the short-term rating rose to A1 from A2+. The revised ratings remain valid through March 31, 2027.

Mahindra Lifespace: INR 80 Crore Logistics Exit
Mahindra Lifespace agreed to sell its entire equity and CCD interests in four Ample Parks logistics associates to Omega Warehouse Holdings 2. Total consideration will not exceed INR 80 crore. Completion is scheduled by December 31, 2026, after which the four entities will cease to be associates.

CEAT: INR 107 Crore GST Win
The Commissioner of Appeals ruled in CEAT's favour on a INR 107-crore GST demand concerning tyres supplied together with tubes and flaps. The authority treated the matter as interpretational and held that proceedings under Section 74 were unsustainable. CEAT expects no impact on profit or operations from the order.

Indoco Remedies: INR 64 Crore Land Sale
Indoco Remedies sold a 2,876.08-square-metre plot at Mahal Industrial Estate, Andheri, to Kalpataru Townships. The sale consideration is INR 64 crore. The buyer is unrelated to Indoco, and the disposal does not affect the company's pharmaceutical operations.

RailTel: Cloud Order Arbitration Win
RailTel received a INR 38.59-crore order, excluding taxes, from Cotton Corporation of India for cloud hosting until October 14, 2032. Separately, an arbitration award granted RailTel approximately INR 13 crore against its INR 94-crore claim. RISL received INR 5 crore against a INR 313-crore counterclaim, leaving about INR 8 crore plus applicable interest and GST payable to RailTel.

Servotech Renewable: INR 800 Crore Borrowing Limit
Servotech's board approved increasing the company's borrowing limit to INR 800 crore. It also approved creating mortgages or charges over company assets for borrowings up to the same amount. Both proposals require shareholder approval through special resolutions.

Nestlé India: 26% Captive Solar Stake
Nestlé India will acquire a 26% fully diluted stake in Radiance KA Sunshine Seven for INR 7.61 crore. The target owns a 17.5-MW AC/26.25-MWp DC solar plant in Koppal and recorded FY26 turnover of INR 15.8 crore. The investment, expected within 30 days, will provide captive renewable power for Nestlé's manufacturing operations.

QMS Medical: Five-Year HEINE Distribution Deal
QMS Medical secured exclusive Indian distribution rights for HEINE Optotechnik products for five years beginning January 1, 2027. HEINE's expected CY26 India revenue is €2.6 million, approximately INR 30 crore. QMS targets about INR 70 crore of turnover from the arrangement by FY29.

Nesco: Project Clearance Tax Penalty

SEIAA granted environmental clearance for Nesco's proposed realty and exhibition projects at Nesco Center, Goregaon. Separately, BMC property-tax invoices included a INR 1,60,65,294 penalty for delayed payment of earlier-year assessment tax. Nesco is obtaining legal advice on the property-tax demand.

Allcargo Global: July Freight Volumes Weaken

July LCL volume was 7.28 lakh cubic metres, down 6% YoY but up 2% MoM. FCL volume fell 20% YoY to 49,138 TEUs, although it increased 1% sequentially. Air-freight volume declined 18% YoY to 2,751 tonnes but grew 14% from June.

Aarti Drugs: Eight-Lakh Stock Option Pool

The board approved the Aarti Drugs Performance Stock Option Plan 2026. The plan may grant up to eight lakh options, with each option convertible into one equity share carrying a INR 10 face value. Implementation remains subject to shareholder approval.

Texmaco Rail: German Rail Components MoU

Texmaco signed a 12-month MoU with Germany's Bochumer Verein Verkehrstechnik covering railway wheels, wheelsets, axles and related components. The parties will evaluate an Indian joint venture, localisation, certification and supplies to Indian Railways and global customers. Shareholding, investment, pricing, capacity and purchase commitments will be fixed through definitive agreements.

Optiemus Infracom: INR 5.6 Crore Drone Infusion

Optiemus will invest INR 5.60 crore in wholly owned subsidiary Optiemus Unmanned Systems by subscribing to 56 lakh shares at INR 10 each. Completion is planned within 90 days, with funds allocated to drone-business working capital and capital expenditure. The subsidiary recorded FY26 turnover of INR 33.16 lakh and negative net worth of INR 7.04 crore.

Union Bank: USD600 Million Bonds Rated

Union Bank's DIFC branch issued two USD300-million senior unsecured notes. S&P rated both BBB, while Fitch assigned BBB-: the 5.230% notes mature in 2029 and the 5.417% notes in 2031. Fitch's rating reflects expected sovereign support and the Government of India's 75% ownership.

Viviana Power Tech: INR 9.74 Crore GETCO Order

Viviana Power Tech received a INR 9.74-crore turnkey contract from Gujarat Energy Transmission Corporation. The work involves 66-kV underground-cable infrastructure and must be completed within 24 months of the letter of award. The contract lifts Viviana's unexecuted order book above INR 1,700 crore.

Om Power Transmission: INR 12.78 Crore GETCO Contract

Om Power Transmission received a INR 12.78-crore contract including GST from Gujarat Energy Transmission Corporation. The scope covers laying, erection, testing and commissioning of 66-kV underground cables for multiple lines. Execution is required within 24 months from the letter-of-award date.

Krystal Integrated: INR 6.60 Crore Temple Contract

Krystal received a INR 6.60-crore contract excluding taxes from the Shree Shyam Mandir Committee in Sikar. It will provide sanitation and waste-management services within 200–250 metres of the Khatu Shyamji temple. The contract runs from October 1, 2026, through September 30, 2027.

MTNL: Bond Watch Debt Default

CRISIL retained AAA(CE)/Watch Negative on MTNL's INR 6,500-crore bonds and INR 20-crore NCDs because repayment depends on a sovereign guarantee and structured payment mechanism. The unsupported rating remains CRISIL D due to continuing debt-servicing delays since June 2024. MTNL's Bank of India account became an NPA, while the government has provided a INR 2,839-crore loan to support interest payments on guaranteed bonds.

Macro / Non-Stock News

Banks Drag Benchmarks Lower
Nifty declined 0.48% to 24,090.85 while Sensex fell 0.70% to 76,933.59. Banking weakness outweighed support from softer crude and positive Asian markets, keeping domestic risk sentiment subdued.

CAS Triggers Sharp Swing
Sensex briefly plunged over 2,000 points during the first monthly expiry under the new Closing Auction Session before recovering to close 539 points lower. The move highlighted elevated liquidity and settlement-price risks around expiry.

DII Buying Remains Strong
FIIs sold INR 298 crore of Indian equities on August 27 while DIIs bought INR 4,977 crore. Strong domestic institutional liquidity continued to absorb foreign selling and provide support to the broader market.

Importer Demand Pressures INR
The rupee weakened to around 95.54/$ as month-end importer demand and short covering offset dollar inflows. FCNR-related inflows and RBI activity remain key drivers of near-term currency and swap-market positioning.

Surplus May Cross INR 5 Trillion
Banking-system liquidity surplus could exceed INR 5 trillion in September due to FCNR inflows and bond redemptions. Markets expect RBI to step up liquidity absorption, particularly as inflation risks preserve policy-tightening optionality.

Stable Investment Grade
S&P retained India's BBB/A-2 sovereign rating with a stable outlook and forecasts 6.6% real GDP growth in 2026. Policy stability and infrastructure spending remain positives, while high public debt and energy dependence remain constraints.

Margins Face Cost Pressure
ICRA expects India Inc Q2FY27 revenue growth of 13–15%, moderating from 21.3% in Q1FY27. Operating margins could contract by over 100 bps as crude, freight and other input costs rise across key sectors.

Technology Leads Risk Assets
MSCI's global equity gauge rose 0.38% as strong AI-sector earnings revived demand for technology stocks. Asian markets strengthened, while European equities remained constrained by French fiscal and political uncertainty.

Rate Hikes Stay Possible
Fed officials reiterated that US inflation remains above comfort levels and further tightening could be required. The hawkish messaging keeps global bond yields, dollar positioning and valuation-sensitive equities exposed to additional rate volatility.

Supply Risk Returns
Brent crude rose to around $88.92/bbl as US-Iran negotiations remained stalled and Hormuz disruptions sustained geopolitical risk premiums. Elevated crude remains a key risk for India's inflation, current account and corporate input costs. Reuters

Disclosures and Disclaimer

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