Market Commentary

Overnight global action:

On 18th August 2026, US markets delivered a negative performance with S&P 500 declining by 53.09 pts (-0.69%), Dow Jones declining by 116.38 pts (-0.22%) and Nasdaq 100 declining by 504.42 pts (-1.68%). Gift Nifty gained by 13.00 pts (+0.05%), indicating Indian markets will open marginally positive.

Advance-Decline ratio on NSE stood at 1,544:1,914 and on BSE at 1,890:2,426, indicating weak market breadth with a negative bias across both exchanges.

Index Options Data Analysis:

Sensex max Call OI at 78,000 and Put OI at 77,000 with PCR of 0.873
Nifty max Call OI at 24,200 and Put OI at 24,150 with PCR of 0.756
Bank Nifty max call OI and put OI both are at 58000 with PCR of 0.824

Securities in Ban for F&O Trade:

BANDHANBNK, LICI, MANAPPURAM, SAIL

Sector Performance:

NIFTY MICROCAP 250 index grew by 0.38% driven by ICIL (+12.14%), PARAS (+10.00%) and AVALON (+8.53%).

NIFTY SMALLCAP 100 index grew by 0.24% driven by ICIL (+12.14%), PARAS (+10.00%) and JYOTICNC (+8.30%).

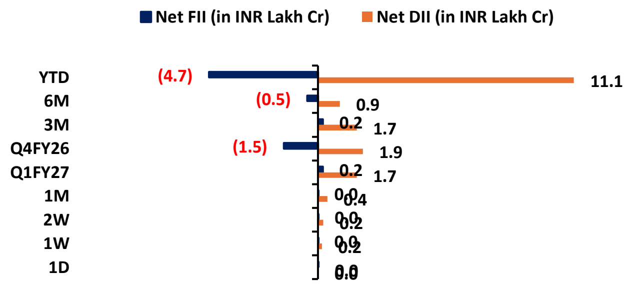
NIFTY SMLCAP 250 index grew by 0.18% driven by JYOTICNC (+8.30%), PFOCUS (+7.23%) and HEG (+6.57%).

NIFTY MID SELECT index declined by 0.72% driven by BHEL (-2.51%), SUZLON (-2.49%) and POLYCAB (-2.47%).

NIFTY 100 index declined by 0.49% driven by LODHA (-3.42%), LTM (-2.93%) and TMPV (-2.24%).

NIFTY 200 index declined by 0.48% driven by SBICARD (-4.17%), OBEROIRLTY (-3.78%) and LODHA (-3.42%).

Fund Flow	Buy	Sell	Net
FII/FPI	13,543	11,892	1,652
DII	15,566	12,987	2,579



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,192	0.1%	-7.9%	21.9
Sensex 30	77,235	-0.6%	-9.4%	20.2
Nifty 50	24,155	-0.6%	-7.6%	21.9
India VIX	11	0.5%	20.2%	
Nifty Bank	57,262	-0.4%	-3.9%	16.9
Nifty Next 50	74,309	-0.2%	7.1%	74.3
Nifty 500	23,472	-0.4%	-1.7%	22.0
Nifty Mid 100	63,539	-0.4%	5.1%	32.7
Nifty Small 250	18,347	0.2%	10.0%	30.9
USD/INR	96.0	0.1%	6.5%	
India 10Y	6.8%			
India 2Y	6.1%			
India 1Y	5.8%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,692	-0.7%	12.4%	33.3
Dow Jones	53,343	-0.2%	11.0%	25.8
Nasdaq 100	29,491	-1.7%	16.8%	48.4
FTSE 100	10,728	0.1%	8.0%	16.9
CAC 40	8,509	-0.8%	4.4%	25.0
DAX	26,128	-0.8%	6.7%	27.2
Nikkei 225	65,507	-2.9%	30.1%	35.0
Hang Seng	25,471	0.1%	-0.6%	12.4
Shanghai Comp	3,990	0.2%	0.5%	18.1
KOSPI	6,429	-6.4%	52.6%	31.8
S&P/ASX 200	9,043	-0.3%	3.8%	23.9

Stocks in the News

INDO-MIM LTD (CMP: 953, MARKET CAP: 47182 Cr., SECTOR: CAPITAL GOODS)

Shares hit the upper circuit, up 10%, after Q1FY27 net profit rose 31.6% YoY to ₹240 crore (from ₹182 crore); consolidated revenue grew 9.4% to ₹1,219 crore, aided by a decline in raw-material costs. Upstox

JUNIPER HOTELS LTD (CMP: 197, MARKET CAP: 4387 Cr., SECTOR: HOTELS & RESORTS)

Q1FY27 net profit jumped 270% YoY to ₹33.3 crore, driven by a 13% revenue rise to ₹249.5 crore and strong RevPAR growth at Grand Hyatt Mumbai and Andaz Delhi. ScanX

CEIGALL INDIA LTD (CMP: 309, MARKET CAP: 5381 Cr., SECTOR: CONSTRUCTION)

Received four Letters of Acceptance from the Ministry of Road Transport & Highways jointly with Sushee Infra Mining, worth a combined ₹2,149.62 crore in EPC road projects; Ceigall holds 74% of the JV. Stock traded lower despite the win. Upstox

LARSEN & TOUBRO LTD (CMP: 4064, MARKET CAP: 560661 Cr., SECTOR: CONSTRUCTION)

Bagged an "ultra-mega" order (worth over ₹15,000 crore, per the company's own classification threshold) in the Middle East for development of multiple offshore facilities. Business Standard

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	29,265	0.3%	3.8%	24.1
Nifty IT	30,213	-1.9%	-20.3%	23.6
Nifty Fin Ser	26,108	-0.4%	-5.5%	17.1
Nifty Pharma	26,362	0.1%	16.0%	43.4
Nifty Services	30,760	-0.7%	-8.6%	33.8
Nifty Cons Dur	40,265	-0.4%	9.6%	54.6
Nifty PSE	9,839	-0.2%	-0.2%	10.3
Nifty FMCG	47,735	-0.8%	-14.0%	32.9
Nifty Pvt Bank	27,248	-0.2%	-5.1%	10.2
Nifty PSU Bank	8,619	-1.0%	1.0%	14.1
Nifty Cons	12,005	-0.5%	-2.3%	42.4
Nifty Energy	38,579	-0.2%	9.2%	12.2
Nifty Health	16,464	0.2%	12.5%	39.4
Nifty India Mfg	16,550	-0.2%	7.4%	30.8
Nifty Metal	13,025	-0.6%	16.6%	23.3
Nifty Oil & Gas	11,231	0.2%	-8.2%	17.2

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
BOSCHLTD	14.9	3.2
SONACOMS	14.2	2.3
APLAPOLLO	5.1	1.0
TIINDIA	4.7	7.5
LTF	4.7	3.3
Short		
KFINTECH	15.3	-1.6
VOLTAS	9.9	-1.1
COLPAL	8.6	-3.3
INOXWIND	7.7	-4.6
DRREDDY	7.3	-0.4
Long Unwinding		
PATANJALI	-2.6	-0.7
PIDILITIND	-2.1	-0.6
HAVELLS	-2.0	-1.1
EICHERMOT	-1.8	-0.6
APOLLOHOSP	-1.7	-0.3
Short Covering		
GRASIM	-3.7	0.2
MFSL	-3.3	1.0
PETRONET	-2.3	0.5
DALBHARAT	-2.3	0.0
M&M	-2.0	0.2

UFLEX LTD (CMP: 613, MARKET CAP: 4420 Cr., SECTOR: CAPITAL GOODS)

Standalone revenue rose 38% YoY to ₹5,397.2 crore in Q1FY27, while normalized PAT surged 630% YoY to ₹423.3 crore, driven by higher packaging film realizations and forex gains; the stock surged 19.99% to ₹586.05. ScanX

Commodities	CMP	1D	YTD
Gold ($)	4,344	0.2%	0.4%
Silver ($)	63.1	-0.3%	-12.9%

Currency	CMP	1D	YTD
USD/INR	96.0	0.1%	6.5%
EUR/INR	110.8	-0.1%	4.9%
GBP/INR	129.5	-0.1%	7.0%
JPY/INR	0.6	0.0%	4.6%
EUR/USD	1.2	0.1%	-1.4%

Securities Lending & Borrowing Scheme (SLBS)

Company	Under.Ltp	Fut.Ltp	Spread (%)
LICHSGFIN	498.80	491.80	1.40
IREDA	115.27	113.89	1.20
GAIL	173.50	171.73	1.02
KFINTECH	957.60	949.25	0.87
SOLARINDS	20,280.00	20,105.00	0.86

52 Week High

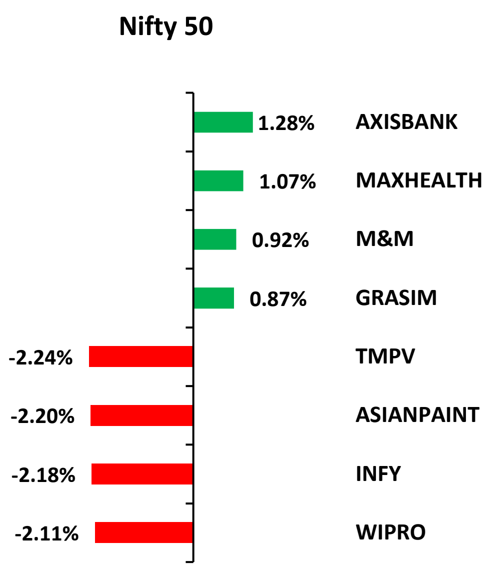
Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
SOLARINDS	20,280	20,422	20,400	13-Aug-26
BOSCHLTD	48,730	48,940	47,730	17-Aug-26
UNITDSPR	1,521	1,550	1,549	11-Aug-26
RADICO	4,733	4,733	4,693	17-Aug-26
AJANTPHARM	3,710	3,796	3,738	17-Aug-26

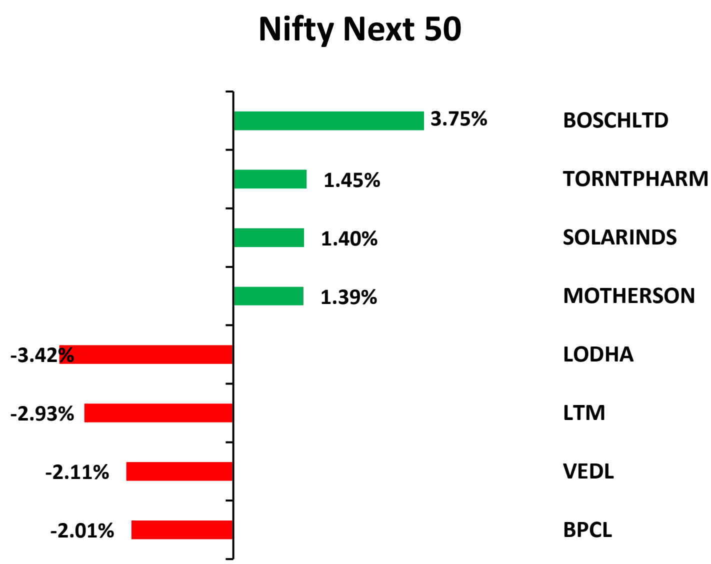
52 Week Low

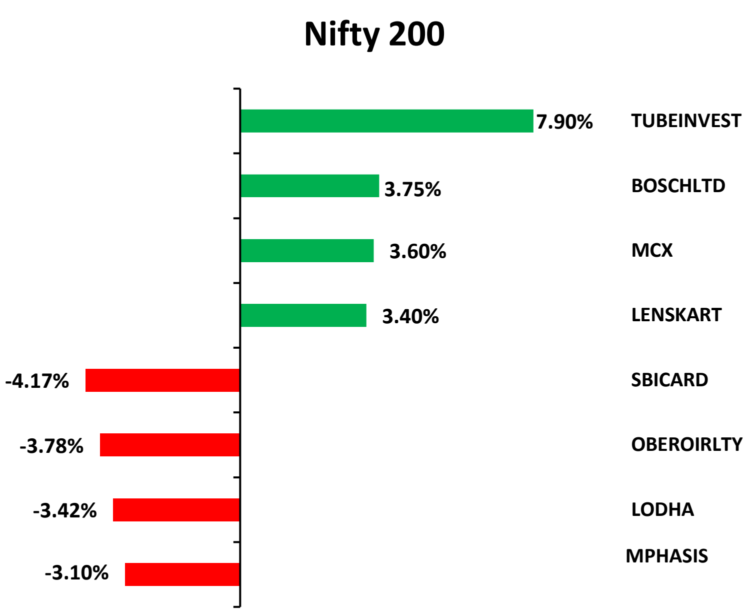
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
ITC	270	269	273	17-Aug-26
DABUR	404	402	402	17-Aug-26
PGHH	8,314	8,300	8,361	17-Aug-26
IRB	19	19	19	17-Aug-26
KEC	428	427	433	17-Aug-26

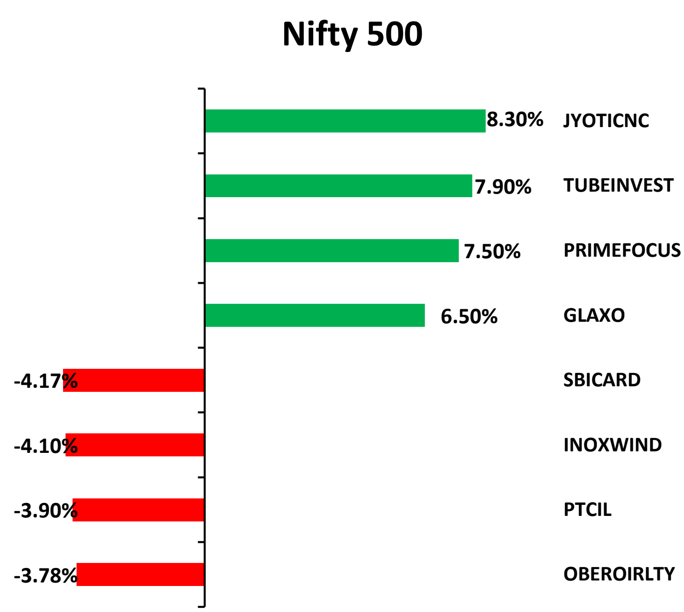
Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
PAYTM	23,058	3,886	5,383	1,546
NATIONSTD	335	58	41	134
JINDRILL	17,886	3,082	1,789	649
PRABHA	5,359	938	535	189
ETHOSLTD	961	174	158	2,870
SUBEXLTD	44,677	8,294	5,605	16
MIDCAPADD	382	72	49	24
NITINSPIN	3,704	710	474	609
CONS	655	127	82	12
ICIL	25,218	4,963	2,870	436
SHAHALLOYS	666	133	75	78
VALIANTLAB	405	82	52	91
BANKBETA	1,802	368	466	59
ABCOTS	153	32	20	217
SOUTHWEST	2,434	509	314	221
MULTICAP	1,952	438	301	17
INDIAGLYCO	2,054	464	323	1,136
AHLUCONT	546	124	75	710
REGAAL	2,976	677	442	100
WINDMACHIN	1,516	351	414	319
SONAMLTD	429	102	66	61
TIINDIA	4,188	1,005	680	2,959
INNOVANA	30	7	5	307
MOGSEC	36	9	11	66
SAYAJIHOTL	0	0	0	315


Nifty 50
1.28%
AXISBANK
1.07%
MAXHEALTH
0.92%
M&M
0.87%
GRASIM
-2.24%
TMPV
-2.20%
ASIANPAINT
-2.18%
INFY
-2.11%
WIPRO


Nifty Next 50
3.75%
BOSCHLTD
1.45%
TORNTPHARM
1.40%
SOLARINDS
1.39%
MOTHERSON
-3.42%
LODHA
-2.93%
LTM
-2.11%
VEDL
-2.01%
BPCL


Nifty 200
7.90%
TUBEINVEST
3.75%
BOSCHLTD
3.60%
MCX
3.40%
LENSKART
-4.17%
SBICARD
-3.78%
OBEROIRLTY
-3.42%
LODHA
-3.10%
MPHASIS


Nifty 500
8.30%
JYOTICNC
7.90%
TUBEINVEST
7.50%
PRIMEFOCUS
6.50%
GLAXO
-4.17%
SBICARD
-4.10%
INOXWIND
-3.90%
PTCIL
-3.78%
OBEROIRLTY

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ASIANTILES	Girish Kalidasbhai Patel	SELL	1992	46.2
ASIANTILES	Thakkar Nileshkumar Farshuram Huf	SELL	1717	46.4
ASIANTILES	Thakkar Nileshkumar Farshuram Huf	BUY	2000	46.2
ASPIRE	Gavrill Metal Private Limited	SELL	118	14.0
ATALREAL	Acme Capital Market Limited	BUY	2901	34.6
ATALREAL	Altizen Ventures Llp	SELL	1155	34.5
ATALREAL	Altizen Ventures Llp	BUY	1378	34.6
ATALREAL	Bullpulse Marketedge Private Limited	BUY	659	35.8
ATALREAL	Bullpulse Marketedge Private Limited	SELL	659	36.0
ATALREAL	Chaubara Eats Private Limited	SELL	1500	35.8
ATALREAL	Chaubara Eats Private Limited	BUY	1500	35.8
ATALREAL	Hjs Securities Private Limited	SELL	812	35.3
ATALREAL	Hjs Securities Private Limited	BUY	812	34.9
ATALREAL	Hrti Private Limited	BUY	2321	33.8
ATALREAL	Hrti Private Limited	SELL	3080	34.0
ATALREAL	L7 Hitech Private Limited	SELL	80	31.8
ATALREAL	L7 Hitech Private Limited	BUY	1200	33.3
ATALREAL	Qe Securities Llp	SELL	1375	33.5
ATALREAL	Qe Securities Llp	BUY	1450	34.2
ATALREAL	Raavi Enterprise	SELL	1280	35.5
ATALREAL	Rg Huf	BUY	1435	35.3
BMLL	Aggarwal Atul Kasturilal	BUY	116	153.5
BMLL	Mahabir Tradeventures Llp	SELL	116	153.5
BMLL	Rathod Manoj Chhaganlal Huf	BUY	46	156.4
BMLL	Rathod Manoj Chhaganlal Huf	SELL	91	156.4
CYIENT	Hdfc Mutual Fund	SELL	533	854.0
E2ERAIL	Parth Infin Brokers Pvt Ltd	SELL	94	302.1
E2ERAIL	Parth Infin Brokers Pvt Ltd	BUY	94	299.8
E2ERAIL	Ramdoot Realtors Pvt Ltd	BUY	90	301.6
E2ERAIL	Ramdoot Realtors Pvt Ltd	SELL	90	300.4
ESCONET	Sunil Kumar Agrawal	SELL	84	173.4
GATECH	L7 Hitech Private Limited	SELL	10603	0.8
GATECH	Rathod Digvijaysinh Rajendrasinh	BUY	1116	0.8
GATECH	Rathod Digvijaysinh Rajendrasinh	SELL	11975	0.8
GCSL	Mansukh Securities & Finance Limited	SELL	154	507.9
GCSL	Mansukh Securities & Finance Limited	BUY	157	515.6
GKSL	L7 Hitech Private Limited	SELL	100	153.8
GKSL	L7 Hitech Private Limited	BUY	531	153.3
ICIL	Microcurves Trading Private Limited	SELL	1497	445.3
ICIL	Microcurves Trading Private Limited	BUY	1497	444.9
JINDRILL	Alphagrep Securities Private Limited	SELL	160	650.6
JINDRILL	Alphagrep Securities Private Limited	BUY	160	649.9
JINDRILL	Blitzquant Research Llp	SELL	405	660.6
JINDRILL	Blitzquant Research Llp	BUY	405	660.3

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
JINDRILL	Dipan Mehta Commodities Private Limited	SELL	324	663.8
JINDRILL	Dipan Mehta Commodities Private Limited	BUY	324	663.7
JINDRILL	Elixir Wealth Management Private Limited	SELL	563	655.5
JINDRILL	Elixir Wealth Management Private Limited	BUY	571	654.5
JINDRILL	Hrti Private Limited	SELL	169	652.3
JINDRILL	Hrti Private Limited	BUY	182	650.0
JINDRILL	Irage Broking Services Llp	SELL	225	656.4
JINDRILL	Irage Broking Services Llp	BUY	244	658.5
JINDRILL	Jump Trading Financial India Private Limited	BUY	195	658.5
JINDRILL	Jump Trading Financial India Private Limited	SELL	195	660.3
JINDRILL	Junomoneta Finsol Private Limited	SELL	574	654.8
JINDRILL	Junomoneta Finsol Private Limited	BUY	575	654.5
JINDRILL	Microcurves Trading Private Limited	SELL	955	656.9
JINDRILL	Microcurves Trading Private Limited	BUY	955	656.3
JINDRILL	Musigma Securities	BUY	175	652.6
JINDRILL	Musigma Securities	SELL	175	653.1
JINDRILL	Nk Securities Research Private Limited	SELL	476	657.3
JINDRILL	Nk Securities Research Private Limited	BUY	476	657.0
JINDRILL	Qe Securities Llp	SELL	273	649.4
JINDRILL	Qe Securities Llp	BUY	273	651.1
KANDARP	Raavi Enterprise	SELL	45	99.4
KANDARP	Rg Huf	BUY	45	99.4
KERNEX	Hrti Private Limited	BUY	95	1,838.1
KERNEX	Hrti Private Limited	SELL	102	1,853.0
KERNEX	Qe Securities Llp	SELL	99	1,842.0
KERNEX	Qe Securities Llp	BUY	102	1,852.2
MOTISONS	Arihant Capital Markets Limited	BUY	16441	16.6
MOTISONS	Arihant Capital Markets Limited	SELL	17524	16.6
MOTISONS	Hrti Private Limited	BUY	6926	16.7
MOTISONS	Hrti Private Limited	SELL	7595	16.6
MOTISONS	Junomoneta Finsol Private Limited	SELL	5739	16.7
MOTISONS	Junomoneta Finsol Private Limited	BUY	5939	16.7
MOTISONS	Nirmalkumar Pareek	BUY	2200	16.6
MOTISONS	Nirmalkumar Pareek	SELL	9000	16.6
MOTISONS	Qe Securities Llp	SELL	5743	16.6
MOTISONS	Qe Securities Llp	BUY	5802	16.8
NAGREEKEXP	Irage Broking Services Llp	SELL	132	23.9
NAGREEKEXP	Irage Broking Services Llp	BUY	157	24.3
NAGREEKEXP	Orion Stocks Ltd	BUY	112	24.1
NAGREEKEXP	Orion Stocks Ltd	SELL	157	24.3
NATIONSTD	Narinder Pal Singh	SELL	102	147.9
NELCO	Hrti Private Limited	BUY	128	973.5
NELCO	Hrti Private Limited	SELL	273	975.1
NELCO	Qe Securities Llp	SELL	117	979.7
NELCO	Qe Securities Llp	BUY	118	969.6

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
NXT-INFRA	A.K. Capital Finance Limited	SELL	21050	95.3
NXT-INFRA	Larsen & Toubro Limited	BUY	20875	95.3
OMFURN	Zyana Stocks And Commodities	SELL	155	55.3
PAYTM	Resilient Asset Management B V	SELL	19210	1,535.1
PONNIERODE	Universal Cine Trades Pvt Ltd	SELL	50	365.2
PROPSHOP	Nova Global Opportunities Fund Pcc - Touchstone	SELL	136	70.0
RATNAVEER	Arihant Capital Markets Limited	SELL	1957	252.3
RATNAVEER	Arihant Capital Markets Limited	BUY	1974	251.9
RATNAVEER	Hrti Private Limited	BUY	357	251.9
RATNAVEER	Hrti Private Limited	SELL	474	252.1
RATNAVEER	Junomoneta Finsol Private Limited	SELL	629	251.6
RATNAVEER	Junomoneta Finsol Private Limited	BUY	659	251.6
RATNAVEER	Mathisys Quantcap Llp	BUY	358	251.5
RATNAVEER	Mathisys Quantcap Llp	SELL	382	251.4
RATNAVEER	Nirmalkumar Pareek	BUY	500	251.0
RATNAVEER	Qe Securities Llp	BUY	807	252.1
RATNAVEER	Qe Securities Llp	SELL	814	251.7
SBC	Deepika Gupta	BUY	2675	38.7
SHANTI-RE	Nandita Suryakantbhai Mehta	SELL	47	34.0
SHANTI-RE	Shripal V Vora (Huf)	SELL	24	28.5
SOUTHWEST	Vikas Jain	SELL	563	229.5
STYLEBAAZA	Ankush Kedia	SELL	381	402.7
STYLEBAAZA	Mansi Share And Stock Broking Private Limited	BUY	176	402.6
STYLEBAAZA	Mansi Share And Stock Broking Private Limited	SELL	666	402.7
SUBEXLTD	Yuga Stocks And Commodities Private Limited	SELL	6501	16.5
SUBEXLTD	Yuga Stocks And Commodities Private Limited	BUY	10076	16.5
WELINV	Lloyds Enterprises Limited	BUY	98	1,790.0
ZAGGLE	Hrti Private Limited	BUY	624	164.8
ZAGGLE	Hrti Private Limited	SELL	683	165.0
ZAGGLE	Junomoneta Finsol Private Limited	BUY	874	165.0
ZAGGLE	Junomoneta Finsol Private Limited	SELL	922	165.0
ZAGGLE	Kedia Securities Private Limited	BUY	2000	164.7
ZAGGLE	Microcurves Trading Private Limited	SELL	730	165.5
ZAGGLE	Microcurves Trading Private Limited	BUY	730	165.5
ZAGGLE	Qe Securities Llp	SELL	1141	164.5
ZAGGLE	Qe Securities Llp	BUY	1182	166.2

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
PAYTM	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	15	1,535.1
PAYTM	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	5	1,535.1
PAYTM	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	30	1,535.1
PAYTM	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	80	1,535.1
PAYTM	ADITYA BIRLA SUN LIFE MUTUAL FUND	BUY	120	1,535.1
PAYTM	BNP PARIBAS FINANCIAL MARKETS - ODI	BUY	200	1,535.1
PAYTM	GHISALLO MASTER FUND LP	BUY	190	1,535.1
PAYTM	GOLDMAN SACHS BANK EUROPE SE	BUY	2255	1,535.1
PAYTM	HDFC MUTUAL FUND	BUY	81	1,535.1
PAYTM	HDFC MUTUAL FUND.	BUY	81	1,535.1
PAYTM	HSBC MUTUAL FUND	BUY	170	1,535.1
PAYTM	HSBC MUTUAL FUND	BUY	605	1,535.1
PAYTM	HSBC MUTUAL FUND	BUY	155	1,535.1
PAYTM	ICICI PRUDENTIAL LIFE INSURANCE COMPANY LIMITED	BUY	460	1,535.1
PAYTM	INTEGRATED CORE STRATEGIES (ASIA) PTE. LTD	BUY	930	1,535.1
PAYTM	MY ASIAN OPPORTUNITIES MASTER FUND	BUY	1450	1,535.1
PAYTM	NORTH ROCK SG VCC	BUY	575	1,535.1
PAYTM	OXBOW INDIA FUND	BUY	19	1,535.1
PAYTM	OXBOW MASTER FUND LIMITED	BUY	645	1,535.1
PAYTM	RESILIENT ASSET MANAGEMENT B V	SELL	19210	1,535.1
PAYTM	SBI MUTUAL FUND	BUY	2750	1,535.1
PAYTM	SBI MUTUAL FUND	BUY	1375	1,535.1
PAYTM	SBI MUTUAL FUND	BUY	550	1,535.1
PAYTM	SBI MUTUAL FUND	BUY	413	1,535.1
PAYTM	SBI MUTUAL FUND	BUY	326	1,535.1
PAYTM	SOCIETE GENERALE	BUY	2840	1,535.1
PAYTM	SUNDARAM MUTUAL FUND	BUY	65	1,535.1
PAYTM	SUNDARAM MUTUAL FUND	BUY	179	1,535.1
PAYTM	SUNDARAM MUTUAL FUND	BUY	44	1,535.1
PAYTM	SUNDARAM MUTUAL FUND	BUY	33	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	462	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	1	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	2	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	22	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	32	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	411	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	306	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	203	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	82	1,535.1
PAYTM	TATA AIA LIFE INSURANCE COMPANY LIMITED	BUY	35	1,535.1
PAYTM	TATA MUTUAL FUND	BUY	90	1,535.1
PAYTM	TATA MUTUAL FUND	BUY	72	1,535.1
PAYTM	VIRIDIAN ASIA OPPORTUNITIES MASTER FUND	BUY	575	1,535.1
PAYTM	VITTORIA FUND-OC	BUY	86	1,535.1

Event Calendar – Corporate Action (Financial Results/ Dividend/other business matters)

Company	Purpose
Aditya Infotech Limited	Fund Raising
Dhanlaxmi Bank Limited	Other business matters
Ducon Infratechnologies Limited	Fund Raising/Other business matters
GP Petroleums Limited	Fund Raising/Other business matters
Lohia Corp Limited	Financial Results
Wheels India Limited	Fund Raising
Xtranet Technologies Limited	Financial Results

Nifty & Bank Spot – Pivot Levels 19/08/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24154.90	24115	24077	24000	24230	24307	24345
Bank Nifty	57262.40	57124	56987	56757	57491	57721	57858

Garden Reach Shipbuilders & Engineers Ltd – Technical Stock Call – 19/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
GRSE	BUY	2677	3080	(2637-2577-2522)	2471

Sector: Defence

About: **Garden Reach Shipbuilders & Engineers Limited (GRSE)** is a leading Indian **defence shipbuilding PSU** under the **Ministry of Defence, Government of India**. It is a **Navratna company** and specializes in designing and building warships for the **Indian Navy and Indian Coast Guard**, along with commercial vessels & engineering products.

View – Short Term Bullish

The stock commenced its downtrend from 3129.80 (MAY 26). Stock started trading below the averages & reached a low of 2550 (MAY 26).

Later, the stock commenced its up move & reached a high of 2934.70 (AUG 26) but could not sustain above & gave a valid correction reaching a low of 2471.70.

As observed on the charts, the stock traded into a consolidation zone during the period MAY 26_AUG 26, taking support on 200 SMA. However, the stock has formed a well-defined base at 2471 levels suggesting bounce back & support at each corrective move.

Buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Descending Triangle - Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 2688 (AUG 26), which is higher than the previous swing highs.

Indicators like RSI, MACD & Aroon suggests positive crossover. The stock is trading above 200 SMA.

Target of **3080** is expected with lower support levels at **(2637-2577-2522)** in case of intermediate fall.

A stop loss at **2471** is to be followed for the trade.

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

Global Macro Events (19th August 2026)		
Event	**Previous**	**Forecasted**
USA		
API Crude Oil Stock Change AUG/14	9.072M	
MBA 30-Year Mortgage Rate AUG/14	6.77%	
MBA Mortgage Applications AUG/14	3.60%	
MBA Mortgage Market Index AUG/14	248.60	
MBA Mortgage Refinance Index AUG/14	744.40	
MBA Purchase Index AUG/14	157.90	
EIA Crude Oil Stocks Change AUG/14	17.422M	
EIA Gasoline Stocks Change AUG/14	-0.968M	
EIA Crude Oil Imports Change AUG/14	1.768M	
EIA Cushing Crude Oil Stocks Change AUG/14	1.611M	
EIA Distillate Fuel Production Change AUG/14	0.05M	
EIA Distillate Stocks Change AUG/14	-0.01M	
EIA Gasoline Production Change AUG/14	-0.001M	
EIA Heating Oil Stocks Change AUG/14	0.192M	
EIA Refinery Crude Runs Change AUG/14	0.026M	
17-Week Bill Auction	3.76%	
20-Year Bond Auction	5.16%	
FOMC Minutes		
China		
FDI (YTD) YoY JUL	-5%	-6.00%
Great Britain		
Inflation Rate YoY JUL	2.60%	3.00%
Core Inflation Rate YoY JUL	2.60%	2.50%
Inflation Rate MoM JUL	0.10%	0.30%
Core Inflation Rate MoM JUL	0.30%	0.30%
PPI Core Output MoM JUL	0.50%	0.50%
PPI Core Output YoY JUL	2.60%	2.70%
PPI Input MoM JUL	-2%	-0.30%
PPI Input YoY JUL	7.30%	7.00%
PPI Output MoM JUL	0.00%	0.30%
PPI Output YoY JUL	3.50%	3.30%
Retail Price Index MoM JUL	0.30%	0.60%
Retail Price Index YoY JUL	3%	3.20%
Germany		
10-Year Bund Auction	3.13%	

SECTION 1: STOCK SPECIFIC NEWS

One 97 Communications (Paytm)

Stock declined after Resilient Asset Management proposed to sell up to a 4.98% stake via block trade under an existing OCD agreement with Antfin; economic value from the sale accrues to Antfin, with no change to founder Vijay Shekhar Sharma's direct holding.

Upstox

PTC Industries

Broke above its 52-week high of ₹19,851 to trade at ₹20,584 on 25x average volume, with the SuperTrend firmly bullish; profit growth outpaced revenue growth in Q1FY27 per a NIFTY500 earnings-quality screen.

Univest

Expleo Solutions

Surged 13.12% to ₹923.05 on an extraordinary 259x five-day average volume, with RSI at 63.91, signalling concentrated institutional interest tied to a corporate catalyst.

Univest

SpiceJet

NCLT deferred orders in eight insolvency petitions against the airline after SpiceJet and one of its aircraft lessors reached a settlement hours before the rulings were scheduled to be pronounced.

Business Standard

IIFL Finance

Fitch Ratings upgraded the NBFC's long-term issuer default rating by a notch to 'BB-' from 'B+', citing improvement in its credit profile and asset quality; Fitch also assigned a stable outlook.

Business Standard

Swiggy

Rolled out its AI Assistant "Guru" for restaurant partners, enabling payout tracking and campaign-performance monitoring across 720+ cities, accessible to 2.7 lakh restaurants on the platform.

Business Standard

Jio Financial Services

JioBlackRock Asset Management, its joint venture with BlackRock, said it will offer regular plans for eligible mutual fund schemes, allowing investors to buy through registered distributors.

Business Standard

Nelco

Stock slipped ~12% intraday despite entering an agreement with US-based Lunar Holdco for satellite communications, involving a $20 million investment via Compulsorily Convertible Debentures carrying a 7% annual compounded return.

Upstox

Tata Power

Signed a Master Research Agreement with IIT Bombay to boost innovation in next-generation energy technologies and advanced clean-energy solutions.

Business Standard

BSE Ltd

Announced a partnership with the PHD Chamber of Commerce and Industry to promote equity financing and expand capital-market access for MSMEs nationally.

Business Standard

SECTION 2: CORPORATE ANNOUNCEMENTS

Netweb Technologies India / ₹1,200 Crore QIP Launch

The fundraising committee approved opening a Qualified Institutional Placement on 17 August to raise ₹1,200 crore, setting the floor price at ₹4,885.90 per share with discretion for up to a 5% discount. Stock hit an all-time high of ₹5,396.40 on the news.

Upstox

Lenskart Solutions / Step-Down Subsidiary Incorporation

Filed confirmation that step-down subsidiary Wenzhou Framekart Trade Co., Ltd was incorporated on 14 August and received its Certificate of Incorporation on 17 August, to handle trading and procurement of spectacle frames in China; Baofeng Framekart Technology will hold 95% equity. Stock hit a 52-week high of ₹628.80.

Upstox

Bharti Airtel / Airtel Payments Bank Chairman Succession
Regulatory filing confirmed Shabnam Sinha will succeed Sunil Bharti Mittal as Chairperson of Airtel Payments Bank for a three-year term from 1 October 2026, following RBI approval; Mittal steps down from the board effective 30 September 2026.
Upstox

Milky Mist Dairy Food / Stock Exchange Listing
Shares debuted on NSE and BSE at ₹165, a 17.86% premium to the ₹140 IPO price. The ₹1,553 crore issue comprised ₹1,428 crore of fresh equity and a ₹125 crore promoter offer-for-sale.
Upstox

Sunshine Pictures / IPO Fully Subscribed on Day 1
The IPO was fully subscribed on its opening day of bidding, marking strong early investor demand ahead of the issue's close.
Upstox

SECTION 3: TOP 12 MACRO / NON-STOCK NEWS

Sensex, Nifty Fall Nearly 400 Points on IT Sell-Off
The Sensex declined as much as 0.6% to an intraday low of 77,275.96, while the Nifty50 fell 0.5% to 24,174.45, dragged by a sell-off in IT stocks and weak global cues through the afternoon session.
Upstox

Asian Paints, Infosys, HCL Tech Lead Nifty Losers
Asian Paints, Infosys, HCL Technologies, Tech Mahindra and Tata Motors PV were the top Nifty50 losers, while Mahindra & Mahindra, Grasim Industries, Bajaj Finance, Axis Bank and Trent led gainers.
Upstox

Crude Tops $91 as US Rules Out Ceasefire Extension
Crude oil surged past $91/barrel after the US ruled out seeking an extension on the Iran ceasefire, which expired Monday; Iran said it would adopt a more offensive posture, escalating regional tensions.
Upstox

US-Iran Ceasefire Deadline Expires With Both Sides Deadlocked

The 60-day memorandum-of-understanding deadline for a final US-Iran deal expired on 17 August, leaving both countries at an impasse over Strait of Hormuz management and frozen Iranian funds.

CNN

Trump Threatens Oman Over Hormuz Mediation Role

President Trump threatened to attack Oman if it interfered with efforts to ease the Strait of Hormuz crisis, as tensions mounted following the ceasefire deadline's expiry.

CNN

Control of Strait of Hormuz Remains Central Sticking Point

Roughly a fifth of global oil and gas supply flows through the Strait; Iran maintains it never formally entered the 60-day ceasefire framework, deepening the diplomatic stalemate now nearly six months old.

The National

Trump Says "No Hurry" to Resolve Iran Conflict

President Trump told Fox News he is in no hurry to settle the dispute, while a backchannel with IRGC officials reportedly remains open despite Tehran's public defiance.

Washington Times

Rupee Weakens Past 95.70/USD

The USD/INR traded at 95.733, up 0.14%, extending the currency's recent weakness as elevated crude prices and cautious risk sentiment pressured the rupee.

Investing.com

US Treasury Yields Rise to Highest Since 2007

The 30-year US Treasury yield reached 5.33% on Monday, its highest level since the global financial crisis, amid concerns about the ballooning US fiscal deficit and Federal Reserve independence.

FXStreet

Israeli Strikes in Lebanon Add to Regional Instability

11 people were killed in Israeli strikes in Lebanon, including several children, further diminishing prospects for a broader Middle East ceasefire.

The National

Government's ₹69,548 Crore Electronics Investment Pipeline

IT ministry secretary S Krishnan confirmed total investment proposals under the ECMS scheme have reached ₹69,548 crore against a ₹59,350 crore target, with 31 fresh approvals worth ₹7,877 crore cleared this session.

Upstox

Disclosures and Disclaimer

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