ventura

Daily Updates

Market Commentary

Overnight global action:

On 1st September 2026, US markets ended lower, with the S&P 500 declining by 54.6 pts (-0.71%), Dow Jones falling by 419.0 pts (-0.79%) and Nasdaq 100 declining by 379.8 pts (-1.29%). Gift Nifty declined marginally by 3.5 pts (-0.01%), indicating a flat opening for Indian markets.

NSE breadth remained negative with 1,344 advances against 2,194 declines, while BSE witnessed 1,700 advances versus 2,645 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,100 Calls and 24,050 Puts. PCR stands at 0.95.
Sensex OI peaks at 78,000 Calls and 76,000 Puts. PCR stands at 0.63.
Bank Nifty Call and Put OI both peak at 57,500 — heavy ATM congestion zone. PCR stands at 1.11.

Securities in Ban for F&O Trade:

SAIL, LICHSGFIN

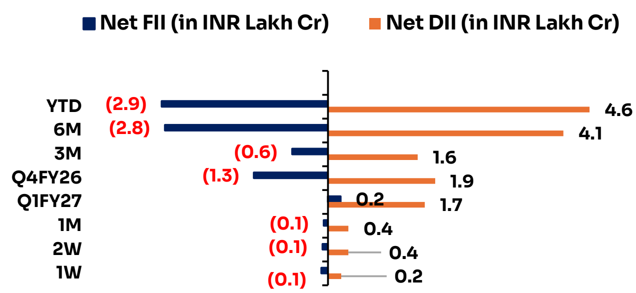
Sector Performance:

NIFTY MID SELECT index declined by 1.43 % dragged by POLYCAB(-5.82%), PAYTM(-4.87%), BHEL(-3.64%)

NIFTY MIDCAP 100 index declined by 1.39 % dragged by KEI(-6.84%), POLYCAB(-5.82%), PAYTM(-4.87%)

NIFTY MIDCAP 50 index declined by 1.31 % dragged by POLYCAB(-5.82%), PAYTM(-4.87%), PRESTIGE(-3.86%)

Fund Flow - 1st Sep	Buy	Sell	Net
FII/FPI (INR Cr)	17,807.5	16,664.2	1,143.4
DII (INR Cr)	15,635.5	13,788.6	1,846.9



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,048	-0.01%	-8.48%	21.8
Sensex 30	76,944	-0.02%	-9.71%	20.1
Nifty 50	24,056	-0.10%	-7.94%	21.8
India VIX	11	1.16%	19.47%	
Nifty Bank	57,410	-1.06%	-3.65%	16.9
Nifty Next 50	72,875	-1.20%	5.06%	72.9
Nifty 500	23,340	-0.47%	-2.23%	21.9
Nifty Mid 100	63,335	-1.39%	4.71%	32.6
Nifty Small 250	18,363	-0.05%	10.06%	30.9
USD/INR	94.9	0.00%	5.56%	
India 10Y	7.0%			
India 2Y	6.2%			
India 1Y	5.6%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,632	-0.71%	11.48%	33.0
Dow Jones	52,767	-0.79%	9.79%	25.5
Nasdaq 100	29,077	-1.29%	15.16%	47.7
FTSE 100	10,789	-0.32%	8.64%	17.0
CAC 40	8,302	-0.39%	1.87%	24.3
DAX	25,970	-1.10%	6.04%	27.1
Nikkei 225	64,660	-2.35%	28.88%	34.5
Hang Seng	25,330	-0.93%	-1.17%	12.3
Shanghai Comp	3,980	-0.16%	0.28%	18.0
KOSPI	6,637	-2.91%	57.34%	32.9
S&P/ASX 200	8,969	-1.08%	2.83%	23.7

Stocks in the News

HFCL (CMP: 237, MARKET CAP: 36220 Cr., SECTOR: TELECOM EQUIPMENT)

NSE Filing

HFCL signed a three-year international agreement worth approximately US$244 million (INR 2,329 crore) for supplying high-fibre-count optical-fibre cables through its overseas subsidiary. Supplies will run from CY27 to CY29, with the contract scheduled for completion by December 2029. The order provides multi-year revenue visibility and strengthens HFCL's position in the global OFC market.

TEXMACO RAIL & ENGINEERING (CMP: 113, MARKET CAP: 4600 Cr., SECTOR: RAILWAY EQUIPMENT)

NSE Filing

Texmaco received a US$135 million international award from Tsiko Africa Logistics and Barberry Holdings. The contract covers the design, manufacture, supply and commissioning of Wabtec ES43ACi 4,500-HP diesel-electric locomotives. Execution is scheduled within 20–24 months from signing the definitive agreement, materially expanding the company's overseas order book.

TATA MOTORS (CMP: 464, MARKET CAP: 171006 Cr., SECTOR: COMMERCIAL VEHICLES)

NSE Filing

Tata Motors' subsidiary secured all prior sectoral regulatory authorisations required for its tender offer for 100% of Iveco Group's common shares. Clearances include approvals from the UK Financial Conduct Authority, Bank of Spain and European Central Bank. The development removes a major regulatory condition for the proposed €3.8 billion acquisition, with the offer document now awaiting Consob review.

ULTRATECH CEMENT (CMP: 11400, MARKET CAP: 335934 Cr., SECTOR: CEMENT / WIRES & CABLES)

NSE Filing

UltraTech commenced commercial production at its new Jhagadia, Gujarat wires and cables facility on 1 September. The plant has installed capacity of 10.98 lakh km and will manufacture house wires and light-duty cables. The commissioning marks UltraTech's operational entry into the wires and cables market and represents diversification beyond its core cement operations.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	28,491	-1.22%	1.07%	23.5
Nifty IT	31,497	0.98%	-16.86%	24.6
Nifty Fin Ser	26,004	-1.10%	-5.83%	17.0
Nifty Pharma	26,793	-1.45%	17.91%	44.1
Nifty Services	30,757	-0.26%	-8.62%	33.8
Nifty Cons Dur	39,865	-1.40%	8.46%	54.0
Nifty PSE	9,660	-0.46%	-1.97%	10.1
Nifty FMCG	46,457	0.94%	-16.26%	32.0
Nifty Pvt Bank	27,762	-0.87%	-3.34%	10.4
Nifty PSU Bank	8,506	-1.21%	-0.32%	13.9
Nifty Cons	11,782	-0.17%	-4.13%	41.6
Nifty Energy	37,806	-0.38%	7.02%	12.0
Nifty Health	16,670	-1.60%	13.87%	39.9
Nifty India Mfg	16,403	-1.09%	6.42%	30.5
Nifty Metal	13,190	-0.03%	18.11%	23.6
Nifty Oil & Gas	11,142	0.35%	-8.90%	17.1

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
ATHERENERG	21.4	4.8
MPHASIS	4.4	3.4
ADANIPOWER	2.5	0.1
NHPC	1.7	0.8
ZYDUSLIFE	1.5	0.1
Short		
MAHABANK	9.8	-0.1
LTF	9.2	-1.0
RADICO	7.8	-1.0
KEI	5.9	-4.4
FINNIFTY	5.6	-1.1
Long Unwinding		
HYUNDAI	-4.8	-3.0
NYKAA	-4.7	-0.7
BAJAJFINSV	-3.7	-1.7
BOSCHLTD	-3.7	-1.5
HINDZINC	-3.6	-1.0
Short Covering		
PREMIERENE	-4.4	0.1
ITC	-3.7	0.7
ETERNAL	-3.5	1.5
BHARATFORG	-3.4	0.0
TATAELXSI	-2.8	0.9

SUDARSHAN CHEMICAL INDUSTRIES (CMP: 1241, MARKET CAP: 9878 Cr., SECTOR: SPECIALTY CHEMICALS)

NSE Filing

Sudarshan agreed to sell its entire stake in VP4 Frankfurt GmbH to Celanese US Holdings for €76.5 million. VP4 generated FY26 revenue of €15.72 million, representing 1.64% of consolidated revenue, and contributed net worth of €5.67 million. The transaction monetises a non-core toll-manufacturing asset and sharpens Sudarshan's focus on pigments following the Heubach acquisition.

Commodities	CMP	1D	YTD
Gold ($)	4,321	-0.15%	0.13%
Silver ($)	64.1	0.1%	-11.5%

Currency	CMP	1D	YTD
USD/INR	94.9	0.00%	5.56%
EUR/INR	110.0	0.09%	4.17%
GBP/INR	128.3	0.09%	5.93%
JPY/INR	0.6	0.10%	3.32%
EUR/USD	1.2	-0.04%	-1.37%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
IREDA	114.20	110.00	3.68
NHPC	76.30	75.10	1.57
PIIND	2,397.10	2,363.50	1.40
KEI	5,348.00	5,278.00	1.31
COALINDIA	401.60	396.70	1.22

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
BAJAJ-AUTO	12,361	12,470	12,130	31-Aug-26
WELCORP	2,556	2,575	2,444	28-Aug-26
ATHERENERG	1,726	1,744	1,718	31-Aug-26
PTCIL	22,665	22,945	22,795	31-Aug-26
SANSERA	3,920	4,085	4,051	31-Aug-26

52 Week Low

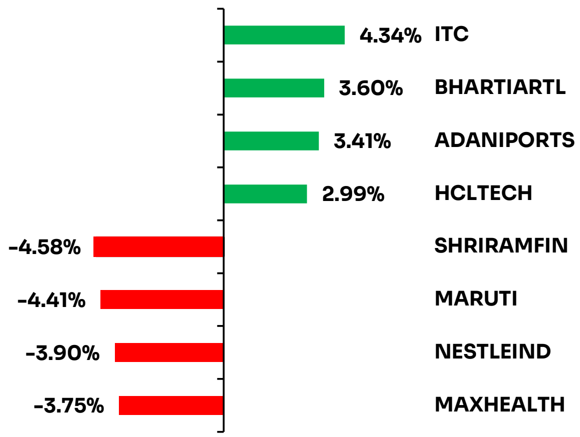
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
HDFCBANK	712	699	704	31-Aug-26
IRFC	83	82	83	31-Aug-26
GODREJCP	905	891	901	31-Aug-26
DABUR	384	381	381	31-Aug-26
RVNL	208	208	210	31-Aug-26

Volume Shockers

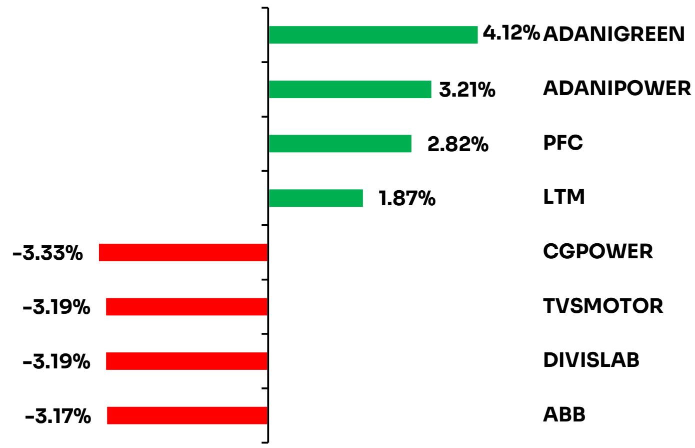
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
MUKESHB	432	1	1	137
MOQUALITY	476	2	3	200
MONEXT50	828	5	5	73
MOGSEC	1,552	10	15	65
VTL	26,384	192	190	598
MOLOWVOL	2,680	29	46	36
ICDSLTD	32	1	1	49
SOTL	11,719	191	207	760
SSWL	28,271	466	502	351
EPL	135,432	2,273	2,927	240
MOM50	250	5	4	250
SAHLIBHFI	603	13	20	83
MERCANTILE	105	3	2	26
SINTERCOM	51	1	2	78
SBIVALETF	277	7	10	15
AEPL	965	26	21	15
IPRINGLTD	116	4	3	174
SHYAMTEL	153	6	7	12
JINDWORLD	120,394	4,962	3,500	42
CAPLIPOINT	1,993	83	77	2,720
GSEC10IETF	7	0	0	264
JINDALPOLY	143	8	15	694
RBZJEWEL	5,613	311	203	169
SRIKPRIND	66	4	3	25
MANAKSTEEL	1,385	86	65	104

Top Gainers & Losers

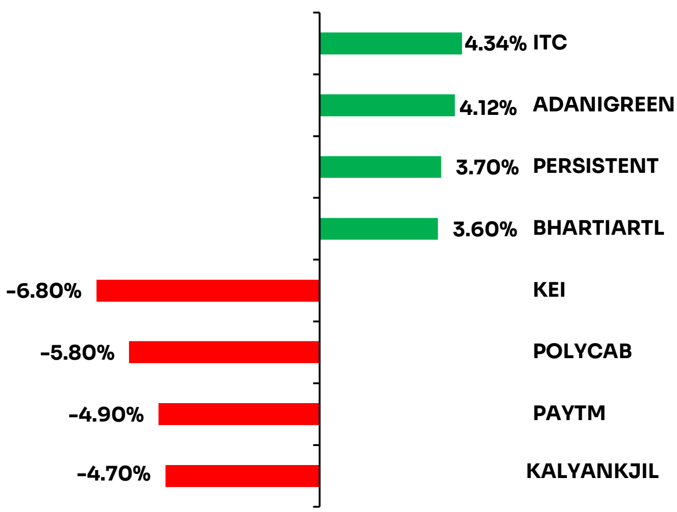
Nifty 50



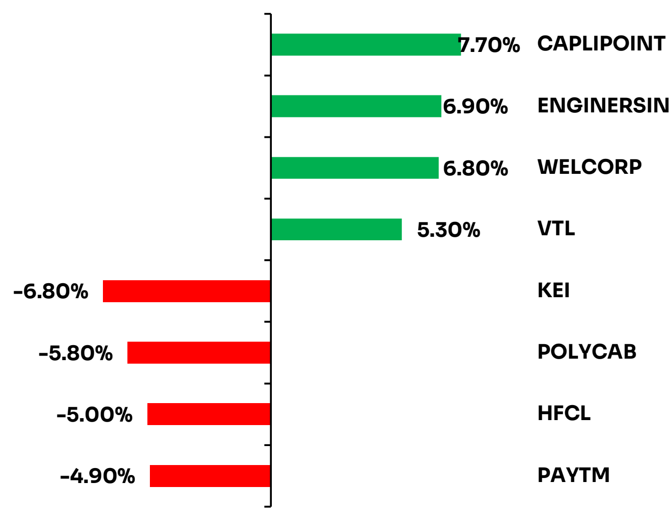
Nifty Next 50



Nifty 200



Nifty 500



Daily Updates

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ATALREAL	QE SECURITIES LLP	BUY	1696	30
ATALREAL	L7 HITECH PRIVATE LIMITED	BUY	1625	32
ATALREAL	VIRTI ENTERPRISE	BUY	425	27
ATALREAL	R G FAMILY TRUST	BUY	688	27
ATALREAL	MANSI SHARE AND STOCK BROKING PVT LTD	BUY	1100	27
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	642	33
ATALREAL	HRTI PRIVATE LIMITED	BUY	2273	30
ATALREAL	MAHESH MULCHAND WAGHELA	BUY	2190	33
ATALREAL	RATHOD DIGVIJAYSINH RAJENDRASINH	BUY	725	33
ATALREAL	VISHAL MAHESH WAGHELA	BUY	795	33
BALAJIPHOS	NNM SECURITIES PVT LTD	BUY	4	106
BANG	ORION STOCKS LTD	BUY	24	35
BIOPOL	NEO APEX SHARE BROKING SERVICES LLP	BUY	95	46
DYCL	QE SECURITIES LLP	BUY	480	540
DYCL	HRTI PRIVATE LIMITED	BUY	382	538
DYCL	MICROCURVES TRADING PRIVATE LIMITED	BUY	800	546
DYCL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	592	542
DYCL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	319	543
ENGINERSIN	MICROCURVES TRADING PRIVATE LIMITED	BUY	4184	282
EPL	QUANT MUTUAL FUND	BUY	1871	241
EPL	IRAGE BROKING SERVICES LLP	BUY	2981	243
EPL	SETU SECURITIES PVT LTD	BUY	1943	240
EPL	MANSI SHARE AND STOCK BROKING PVT LTD	BUY	3018	242
EPL	F3 ADVISORS PRIVATE LIMITED	BUY	3864	242
EPL	QUANT MUTUAL FUND	BUY	12495	240
EPL	PUBLIC SECTOR PENSION INVESTMENT BOARD	BUY	3540	240
EPL	ICICI PRUDENTIAL MUTUAL FUND	BUY	1666	240
EPL	EDELWEISS MUTUAL FUND	BUY	1833	240
EPL	BANDHAN MUTUAL FUND	BUY	2082	240
EPL	ADITYA BIRLA SUN LIFE INSURANCE LTD	BUY	2082	240
EPL	ABU DHABI INVESTMENT AUTHORITY	BUY	2749	240
EPL	360 ONE PIPE FUND	BUY	1666	240
EPL	360 ONE MUTUAL FUND	BUY	1874	240
EPL	360 ONE ASSET MANAGEMENT LIMITED	BUY	1847	240
EPL	SWETABEN HARDIK SHAH	BUY	1706	240
EPL	NEO APEX SHARE BROKING SERVICES LLP	BUY	1795	240
EPL	D3 STOCK VISION LLP	BUY	1984	242
EPL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1653	242
FMGOETZE	HRTI PRIVATE LIMITED	BUY	237	625
GATECH	SV GLOBAL FINANCE PRIVATE LIMITED	BUY	20404	1
HAPPSTMNDS	QE SECURITIES LLP	BUY	770	368
HAPPSTMNDS	HRTI PRIVATE LIMITED	BUY	773	368
HTEL	NEO APEX SHARE BROKING SERVICES LLP	BUY	850	72
JINDWORLD	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	8031	42
JINDWORLD	MICROCURVES TRADING PRIVATE LIMITED	BUY	6100	43

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
KSHITIJ-RE	DEENA RAM CHAUDHARY HUF	BUY	1200	0
KSHITIJ-RE	MURINGATHERY JOHNY VARGHESE	BUY	900	0
MADHURKNIT	PROGNOSIS SECURITIES PVT. LTD	BUY	604	100
MANAKSTEEL	PRUDENT EQUITY ACE FUND	BUY	615	104
MANALIPETC	ELIXIR EQUITIES PRIVATE LTD	BUY	1079	86
MANALIPETC	CLT RESEARCH TECH PRIVATE LTD	BUY	957	86
MANALIPETC	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1160	86
MANALIPETC	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1224	86
MANALIPETC	IRAGE BROKING SERVICES LLP	BUY	1242	86
MANALIPETC	QE SECURITIES LLP	BUY	2835	86
MANALIPETC	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	2749	86
MANALIPETC	MICROCURVES TRADING PRIVATE LIMITED	BUY	3733	86
MARKOLINES	VISTAAR TRADING SERVICE PRIVATE LIMITED	BUY	130	176
MASON	MANGAL KESHAV CAPITAL LIMITED	BUY	211	120
MILTON	THACKER MEENAKUMARI	BUY	343	36
MILTON	CHINTAN ARUN BHAI THACKER	BUY	90	36
MILTON	VOHERA SHUBH VISHALBHAI	BUY	143	36
MUKESHB	ISTAA FASHIONS PRIVATE LIMITED	BUY	150	145
MUKESHB	ISTAA INFOTECH PRIVATE LIMITED	BUY	156	145
MUKESHB	ISTAA SECURITIES PRIVATE LIMITED -	BUY	126	145
MVELECTRO	HRTI PRIVATE LIMITED	BUY	262	730
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	255	733
MVELECTRO	QE SECURITIES LLP	BUY	237	736
OMAXE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1721	126
OMAXE	MICROCURVES TRADING PRIVATE LIMITED	BUY	3568	125
OMAXE	QE SECURITIES LLP	BUY	1135	125
OMAXE	HRTI PRIVATE LIMITED	BUY	2764	125
OMAXE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	940	124
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	798	299
RATNAVEER	INFINITE DERIVATIVES LLP	BUY	390	296
RATNAVEER	HRTI PRIVATE LIMITED	BUY	424	295
RBZJEWEL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	330	170
RCDL-RE	SHABBIR NAZMUDDIN PARATHA	BUY	156	3
SAHLIBHFI	PIYUSH SECURITIES PRIVATE LIMITED	BUY	493	75
SAWALIYA	KAUSHAL MANOJBHAI KORADIYA	BUY	99	158
SHINDL	MINERVA VENTURES FUND	BUY	200	162
SKYWAYS	GOLDMINE STOCKS PRIVATE LIMITED	BUY	827	129
SKYWAYS	KABRA PRIYA	BUY	730	128
SKYWAYS	GOLDENDUNES LAND DEVELOPERS PRIVATE LIMITED	BUY	1619	125
SKYWAYS	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	2061	129
SKYWAYS	PURE BROKING PRIVATE LIMITED	BUY	1488	131
SKYWAYS	GRT STRATEGIC VENTURES LLP	BUY	1379	130
SKYWAYS	IRAGE BROKING SERVICES LLP	BUY	1314	130
SKYWAYS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	2879	130
SKYWAYS	MICROCURVES TRADING PRIVATE LIMITED	BUY	1076	132

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SOTL	HRTI PRIVATE LIMITED	BUY	392	758
SOTL	MICROCURVES TRADING PRIVATE LIMITED	BUY	835	764
SOTL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	486	762
SSWL	MICROCURVES TRADING PRIVATE LIMITED	BUY	2634	346
SSWL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1147	345
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	616	448
SUNSHINE	HRTI PRIVATE LIMITED	BUY	208	452
SUNSHINE	MATHISYS QUANTCAP LLP	BUY	162	452
SUNSHINE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	174	452
SUNSHINE	QE SECURITIES LLP	BUY	188	452
SYMBIOTEC	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	472	1051
SYMBIOTEC	TIMF HOLDINGS	BUY	377	989
SYMBIOTEC	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	553	1074
SYMBIOTEC	GOLDMINE STOCKS PRIVATE LIMITED	BUY	573	1072
SYMBIOTEC	MICROCURVES TRADING PRIVATE LIMITED	BUY	668	1104
SYMBIOTEC	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	842	1063
SYMBIOTEC	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1876	1068
SYMBIOTEC	IRAGE BROKING SERVICES LLP	BUY	752	1079
SYMBIOTEC	GRT STRATEGIC VENTURES LLP	BUY	404	1069
SYMBIOTEC	PURE BROKING PRIVATE LIMITED	BUY	628	1049
TBZ	NEO APEX SHARE BROKING SERVICES LLP	BUY	807	364
TBZ	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	358	344
TBZ	QE SECURITIES LLP	BUY	324	347
TBZ	IRAGE BROKING SERVICES LLP	BUY	345	339
TBZ	SETU SECURITIES PVT LTD	BUY	470	367
TBZ	MICROCURVES TRADING PRIVATE LIMITED	BUY	356	349
TEJA	SUMICKSHA BANSAL	BUY	39	234
TEJA	ADITI MEHTA	BUY	34	240
TEMPSENS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	591	554
TNPETRO	QE SECURITIES LLP	BUY	663	130
TNPETRO	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	451	129
TNPETRO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	524	129
TNPETRO	RAJAT LODHA	BUY	450	127
TNPETRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	551	129
VINEETLAB	CHARAN REDDY PULI	BUY	100	38
VTL	MICROCURVES TRADING PRIVATE LIMITED	BUY	2089	610
WEL	SETU SECURITIES PVT LTD	BUY	647	81
WEL	NEXUS GLOBAL OPPORTUNITIES FUND	BUY	1500	81
SOTL	MICROCURVES TRADING PRIVATE LIMITED	SELL	835	764
SSWL	MICROCURVES TRADING PRIVATE LIMITED	SELL	2634	346
SSWL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1143	345
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	366	454
SUNSHINE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	173	452
SUNSHINE	QE SECURITIES LLP	SELL	180	452
SUNSHINE	HRTI PRIVATE LIMITED	SELL	211	452

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SUNSHINE	MATHISYS QUANTCAP LLP	SELL	166	452
SYMBIOTEC	MICROCURVES TRADING PRIVATE LIMITED	SELL	668	1105
SYMBIOTEC	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1847	1067
SYMBIOTEC	IRAGE BROKING SERVICES LLP	SELL	929	1058
SYMBIOTEC	GRT STRATEGIC VENTURES LLP	SELL	404	1069
SYMBIOTEC	PURE BROKING PRIVATE LIMITED	SELL	627	1049
SYMBIOTEC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	842	1064
SYMBIOTEC	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	447	1058
SYMBIOTEC	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	548	1074
SYMBIOTEC	GOLDMINE STOCKS PRIVATE LIMITED	SELL	574	1073
TBZ	IRAGE BROKING SERVICES LLP	SELL	245	342
TBZ	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	356	345
TBZ	NEO APEX SHARE BROKING SERVICES LLP	SELL	807	367
TBZ	MICROCURVES TRADING PRIVATE LIMITED	SELL	356	349
TBZ	SETU SECURITIES PVT LTD	SELL	470	364
TBZ	QE SECURITIES LLP	SELL	361	356
TEJA	SUMICKSHA BANSAL	SELL	40	240
TEMPSENS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	595	554
TNPETRO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	524	129
TNPETRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	564	129
TNPETRO	RAJAT LODHA	SELL	10	129
TNPETRO	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	451	129
TNPETRO	QE SECURITIES LLP	SELL	644	129
VINEETLAB	ANASUYA GORLA	SELL	113	38
VTL	MICROCURVES TRADING PRIVATE LIMITED	SELL	2089	611
WEL	NEO APEX SHARE BROKING SERVICES LLP	SELL	765	81
WEL	SETU SECURITIES PVT LTD	SELL	821	82
WEL	NEO APEX SHARE BROKING SERVICES LLP	BUY	508	81
AARADHYA	P K A CAPITAL PRIVATE LIMITED	SELL	80	85
ABH	CRAFT EMERGING MARKET FUND PCC- CITADEL	SELL	142	99
ALOKINDS	JM FINANCIAL ASSET RECONSTRUCTION	SELL	40000	8
ARIS	HRTI PRIVATE LIMITED	SELL	499	132
ARIS	VAIBHAV RAJENDRA DOSHI	SELL	476	130
ASIANTILES	CORE INC	SELL	2484	50
ASIANTILES	M7 GLOBAL FUND PCC - CELL VERTEX	SELL	1650	50
ATALREAL	VISHAL MAHESH WAGHELA	SELL	795	33
ATALREAL	L7 HITECH PRIVATE LIMITED	SELL	1650	30
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	567	33
ATALREAL	VIRTI ENTERPRISE	SELL	1075	27
ATALREAL	QE SECURITIES LLP	SELL	1677	30
ATALREAL	R G FAMILY TRUST	SELL	176	27
ATALREAL	HRTI PRIVATE LIMITED	SELL	1884	32
BALAJIPHOS	NNM SECURITIES PVT LTD	SELL	151	89
BANG	ORION STOCKS LTD	SELL	90	35
DYCL	QE SECURITIES LLP	SELL	486	541

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
DYCL	HRTI PRIVATE LIMITED	SELL	363	540
DYCL	MICROCURVES TRADING PRIVATE LIMITED	SELL	800	546
DYCL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	590	542
DYCL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	319	543
ENGINERSIN	MICROCURVES TRADING PRIVATE LIMITED	SELL	4184	282
EPL	SETU SECURITIES PVT LTD	SELL	1943	243
EPL	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	SELL	2843	245
EPL	SWETABEN HARDIK SHAH	SELL	1706	244
EPL	NEO APEX SHARE BROKING SERVICES LLP	SELL	1475	242
EPL	D3 STOCK VISION LLP	SELL	1889	243
EPL	F3 ADVISORS PRIVATE LIMITED	SELL	4121	243
EPL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1275	241
EPL	EPSILON BIDCO PTE LTD	SELL	84480	241
EPL	IRAGE BROKING SERVICES LLP	SELL	501	243
FMGOETZE	HRTI PRIVATE LIMITED	SELL	300	625
GATECH	RATHOD DIGVIJAYSINH RAJENDRASINH	SELL	13889	1
HAPPSTMNDS	QE SECURITIES LLP	SELL	737	372
HAPPSTMNDS	HRTI PRIVATE LIMITED	SELL	732	372
HAPPSTMNDS	BNP PARIBAS FINANCIAL MARKETS	SELL	1019	367
HTEL	NEO APEX SHARE BROKING SERVICES LLP	SELL	0	77
JINDWORLD	MICROCURVES TRADING PRIVATE LIMITED	SELL	6100	43
JINDWORLD	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	8027	42
MANALIPETC	CLT RESEARCH TECH PRIVATE LTD	SELL	957	86
MANALIPETC	ELIXIR EQUITIES PRIVATE LTD	SELL	1109	86
MANALIPETC	MICROCURVES TRADING PRIVATE LIMITED	SELL	3733	86
MANALIPETC	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	2746	86
MANALIPETC	QE SECURITIES LLP	SELL	2859	86
MANALIPETC	IRAGE BROKING SERVICES LLP	SELL	730	86
MANALIPETC	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1224	86
MANALIPETC	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1160	86
MARKOLINES	VISTAAR TRADING SERVICE PRIVATE LIMITED	SELL	132	176
MASON	PARESH N BHAGAT	SELL	171	120
MILTON	PREETI ABHAYBHAI JAIN	SELL	337	36
MILTON	MAHIPALSINGH JAIN HUF	SELL	271	36
MUKESHB	MUKESH CHAMPAKLAL BABU	SELL	432	145
MVELECTRO	HRTI PRIVATE LIMITED	SELL	213	738
MVELECTRO	QE SECURITIES LLP	SELL	231	738
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	257	733
MVKAGRO	SHILPABEN PIYUSHBHAI MAVANI	SELL	380	204
MVKAGRO	ALPABEN HITESHBHAI MANGUKIYA	SELL	313	204
OMAXE	QE SECURITIES LLP	SELL	1135	126
OMAXE	HRTI PRIVATE LIMITED	SELL	2838	127
OMAXE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1731	126
OMAXE	MICROCURVES TRADING PRIVATE LIMITED	SELL	3568	125
OMAXE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	940	124

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1075	298
RATNAVEER	HRTI PRIVATE LIMITED	SELL	479	299
RBZJEWEL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	330	170
SAHLIBHFI	PIYUSH SECURITIES PRIVATE LIMITED	SELL	1	80
SAHLIBHFI	ARYAVARDHAN TRADING LLP	SELL	500	75
SHINDL	RAASHA FINCAP PRIVATE LIMITED	SELL	316	162
SHYAMTEL	MEGHNA AGARWAL	SELL	93	12
SKYWAYS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	2870	130
SKYWAYS	GRT STRATEGIC VENTURES LLP	SELL	1379	130
SKYWAYS	GOLDMINE STOCKS PRIVATE LIMITED	SELL	827	129
SKYWAYS	KABRA PRIYA	SELL	730	128
SKYWAYS	IRAGE BROKING SERVICES LLP	SELL	1539	129
SKYWAYS	MICROCURVES TRADING PRIVATE LIMITED	SELL	1076	132
SKYWAYS	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	2061	129
SKYWAYS	PURE BROKING PRIVATE LIMITED	SELL	1415	132
SOTL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	486	762
SOTL	HRTI PRIVATE LIMITED	SELL	360	761
AARADHYA	M/S VA TRADINGVENTURE LLP	BUY	77	85
ABH	RATHOD DIGVIJAYSINH RAJENDRASINH	BUY	192	99
ARIS	HRTI PRIVATE LIMITED	BUY	184	131
ARIS	VAIBHAV RAJENDRA DOSHI	BUY	476	131
ASIANTILES	THAKKAR NILESHKUMAR FARSHURAM HUF	BUY	2844	50
ASIANTILES	CORE INC	BUY	2484	50

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
HATSUN	CHANDRAMOGAN R G	BUY	825	1,192
HATSUN	RAVI KIRTI SHAH	SELL	384	1,192
HATSUN	RAJU KIRTI SHAH	SELL	441	1,192

Event Calendar – Corporate Action 2nd Sep 2026

Company	Purpose
Cambridge Technology Enterprises Limited	Annual Report
Dynacons Systems & Solutions Limited	Other Business
Ganesh Benzoplast Limited	AGM Matters
Genesys International Corporation Limited	ESOP Scheme
Krishival Foods Limited	Board Meeting
Natural Capsules Limited	Fund Raising
Persistent Systems Limited	Fund Raising
Quality Power Electrical Equipments Limited	Preferential Issue
Shalibhadra Finance Limited	Dividend
Technocraft Ventures Limited	Financial Results

Global Macro Events 2nd Sep 2026

Event	Previous	Forecast
USA		
LMI Logistics Managers Index AUG	68.9	
Redbook YoY AUG/29	9.10%	
S&P Global Manufacturing PMI Final AUG	53.9	53.2
ISM Manufacturing PMI AUG	55.6	55
JOLTs Job Openings JUL	7.182M	7.4M
ISM Manufacturing Employment AUG	52.8	52.5
Construction Spending MoM JUL	0%	-0.10%
ISM Manufacturing New Orders AUG	56.7	56
ISM Manufacturing Prices AUG	71.1	70
JOLTs Job Quits JUL	3.213M	3.21M
RCM/TIPP Economic Optimism Index SEP	45.1	46.4
Dallas Fed Services Index AUG	6.6	5
Dallas Fed Services Revenues Index AUG	9.5	7
52-Week Bill Auction	3.88%	
6-Week Bill Auction	3.65%	
API Crude Oil Stock Change AUG/28	4.2M	
MBA 30-Year Mortgage Rate AUG/28	6.78%	
MBA Mortgage Applications AUG/28	-1%	
MBA Mortgage Market Index AUG/28	245.3	
MBA Mortgage Refinance Index AUG/28	740.8	
MBA Purchase Index AUG/28	154.4	
ADP Employment Change AUG	44K	51.0K
Factory Orders MoM JUL	-0.30%	0.40%
Factory Orders ex Transportation JUL	-0.40%	0.20%
EIA Crude Oil Stocks Change AUG/28	0.095M	

Global Macro Events 2nd Sep 2026

Event	Previous	Forecast
USA		
EIA Gasoline Stocks Change AUG/28	-2.536M	
EIA Crude Oil Imports Change AUG/28	-0.161M	
EIA Cushing Crude Oil Stocks Change AUG/28	1.176M	
EIA Distillate Fuel Production Change AUG/28	-0.091M	
EIA Distillate Stocks Change AUG/28	-2.228M	
EIA Gasoline Production Change AUG/28	0.061M	
EIA Heating Oil Stocks Change AUG/28	0.027M	
EIA Refinery Crude Runs Change AUG/28	-0.002M	
17-Week Bill Auction	3.75%	
Total Vehicle Sales AUG	16.3M	
India		
HSBC Manufacturing PMI Final AUG	53.5	52.9
Current Account Q2	$6.5B	$ -7.4B
Germany		
Retail Sales MoM JUL	0.0%	0.50%
Retail Sales YoY JUL	0.6%	0.20%
S&P Global Manufacturing PMI Final AUG	52.2	54.1
5-Year Bobl Auction	2.93%	
Great Britain		
BRC Shop Price Inflation AUG	0.90%	1.00%
Nationwide Housing Prices MoM AUG	-0.1%	0.10%
Nationwide Housing Prices YoY AUG	1.4%	1.90%
BoE Consumer Credit JUL	£1.865B	£1.9B
Mortgage Approvals JUL	58.22K	57.9K
Mortgage Lending JUL	£7.68B	£4.6B
M4 Money Supply MoM JUL	0.90%	0.60%
Net Lending to Individuals MoM JUL	£9.5B	£9.0B
S&P Global Manufacturing PMI Final AUG	51.9	51.5
China		
RatingDog Manufacturing PMI AUG	50.9	51.2

Nifty & Bank Spot – Pivot Levels 02/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24055.80	23957	23859	23766	24148	24241	24339
Bank Nifty	57409.60	57117	56825	56501	57733	58057	58349

Welspun Enterprises Ltd – Technical Stock Call – 02/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
WELENT	BUY	705.55	1000	(678-652)-634-(615-590)	557

Sector: Infrastructure (INE625G01013)

About: Welspun Enterprises Limited (WELENT) is the infrastructure development arm of Welspun World. The company develops and operates roads & highways, water and wastewater projects, tunnels, and urban infrastructure through EPC and Public-Private Partnership (PPP/HAM/BOT) models, making it a key beneficiary of India's infrastructure spending.

View – Long Term Bullish

The stock commenced its downtrend from 655 (JAN 25). Thereafter, the stock slipped & further marked a low of 400.05 (FEB 25).
Later, the stock attracted buying interest & commenced its up move, rallied towards a high of 580 (OCT 25), but faced resistance in that area & witnessed a valid correction marking a low of 412 (MAR 26), although not breaching but taking support above 200 SMA.
Again buying interest emerged at lower levels leading to a gradual recovery & the stock further mark a high of 634.90 (JUL 26). During the correction phase, the stock traded flat into a narrow consolidation range between 400.05– 634.90 during the period FEB 25_JUL 26.
Recently, after forming higher bottoms at 557.10 (AUG 26), the stock has given a **Horizontal Channel Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 712 (AUG 26), which is higher than the previous swing tops.

Indicators like MACD, KST & Aroon suggests positive crossover.
The stock is trading above 200 SMA lines. The 200 SMA is in rising mode.
Target of **1000** is expected with lower support levels at **(678-652)-634-(615-590)** in case of intermediate fall.
A stop loss at **557** is to be followed for the trade.
All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

Oil & Natural Gas Corporation Ltd – Technical Stock Call – 02/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
ONGC	BUY	236.45	260	(231-228)	223

Sector: Oil & Gas (INE213A01029)

About: Oil & Natural Gas Corporation (ONGC) is India's largest Maharatna Public Sector Enterprise (PSU) in the oil & gas sector. It is the country's leading upstream energy company, engaged in the exploration, production, and development of crude oil and natural gas, contri buting around 70% of India's domestic crude oil production.

View – Short Term Bullish

The primary move in the stock commenced from 227.65 (JUN 26).

Stock started trading above the short term averages & gradually reached a high of 254.20 (JUL 26).

Lower tops were formed, profit booking followed & the stock further reached a low of 230.79 (AUG 26).

As observed on the charts, the stock has formed a well-defined base at 230 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 236.50 (SEP 26), which is higher than the previous few days high.

Indicators like Stoch RSI & Williams% R suggests positive crossover.

Target of **260** is expected with lower support levels at **(231-228)** in case of intermediate fall.

A stop loss at **223** is to be followed for the trade.

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

Stock specific news

Sical Logistics – INR 535 crore mining contract
Sical Logistics received a INR 534.73 crore contract from Central Coalfields Limited for overburden removal and extraction of lower seams at the SDOC Mine in the Dhori area. The contract covers a 143-hectare mining area and will run for five years or 1,825 days. The transaction is not related-party in nature.

Marine Electricals – INR 230 crore data-centre orders
Marine Electricals secured orders totalling INR 229.73 crore, excluding taxes, from Digital Edge DC (India). The contracts cover supply of power-distribution systems for the customer's data-centre infrastructure. Deliveries are scheduled over 15 months, providing execution visibility through FY28.

EMS – INR 219 crore sewerage project
EMS emerged as L1 for a INR 218.65 crore, including GST, sewerage and septage-management project awarded by the Government of Rajasthan. The work covers sewerage systems across six urban local bodies, followed by one-year defect liability and 10 years of operation and maintenance. Construction is scheduled over 18 months, subject to receipt of the formal award.

ITC Hotels – Ahmedabad hotel acquisition
ITC Hotels completed the acquisition of 100% of GHK Hospitality & Infrastructures for an enterprise value of INR 155 crore on a cash-free, debt-free basis. The target owns an Ahmedabad hotel already operated by ITC Hotels under an existing arrangement. GHK generated FY26 turnover of INR 35.16 crore, and ITC Hotels acquired 2,82,27,741 equity shares.

ARSS Infra – INR 131 crore railway bridges
ARSS Infrastructure received a INR 130.53 crore order from East Coast Railway for constructing road-over-bridges on the Howrah–Visakhapatnam main line. The project includes ROBs near Kaipadar Road–Tapang and Balugaon–Chilika, replacing level crossings 209 and 255. Execution is scheduled over 24 months.

NephroPlus – Kazakhstan dialysis acquisition
NephroPlus' overseas subsidiary agreed to acquire 100% of Dialysis Center Almaty LLP for approximately INR 11.64 crore, subject to downward adjustments. The target operates 34 dialysis machines in Kazakhstan and reported CY25 turnover of INR 10.93 crore, versus INR 10.23 crore in CY24. The transaction expands NephroPlus' operating platform in Kazakhstan.

Western Carriers – Kolkata terminal concession
Western Carriers secured development and operating rights for the General Cargo Terminal at Kolkata Dock System for 15 years. The operational terminal handles containers and other cargo and is connected through road, rail and inland waterways. Initial civil-infrastructure investment is estimated at INR 13.68 crore, with development beginning immediately.

Centum Electronics – US$3.22 million export order
Centum Electronics received a US$3.22 million order, approximately INR 30.5 crore, from a global OEM customer. The international contract covers design, development and delivery of advanced electronic systems. Execution is scheduled over the next seven months, adding near-term export revenue visibility.

KPI Green – 76.6 MW hybrid project
KPI Green received an LOI for a 33.6 MW wind plus 43 MW DC solar group-captive project in Gujarat, aggregating to 76.6 MW DC. Construction and commissioning must be completed within 14 months from the Stage-2 closing date, targeted for November 2027. The associated energy-supply agreement will run for 25 years.

3i Infotech – Managed-services extension
3i Infotech received a INR 1.70 crore purchase order extending an IT managed-services engagement with an Indian customer. The scope includes shared global command-centre support, onsite services, PAV and VAPT-related work. The contract runs for 12 months from 1 August 2026 to 31 July 2027.

Juniper Green – Wind capacity commissioned
Juniper Green commissioned another 12.4 MW of wind capacity under its 120 MW firm and dispatchable renewable-energy project. Commissioned capacity under the project has reached 177.6 MWp with approximately 201 MWh of battery storage, against planned capacity of 232.4 MWp. Group operational capacity now stands at approximately 2,588 MWp and 500 MWh BESS.

Ravindra Energy – 500 electric trucks
Associate company Energy In Motion signed an MoU with Oil Field Warehouse & Services and Radiance Green Mobility to deploy 500 electric heavy commercial vehicles. The rollout covers the Mumbai–Pune, Mundra–Morbi–Ahmedabad and Mumbai–Delhi freight corridors. The first 50 vehicles will begin operating on Mumbai–Pune in October 2026, supported by EIM's battery-swapping network.

United Breweries – New canning capacity
United Breweries is investing INR 110 crore in a new canning line at its Ellora Brewery in Maharashtra. The facility will process 40,000 cans per hour and is expected to become operational during September 2026, subject to statutory approvals. The brewery's overall packaging capacity is currently up to 1.5 million cases per month.

DCM Shriram – Aluminium plant commissioned
DCM Shriram commissioned the main aluminium-extrusion plant at its Kota facility on 1 September 2026. The facility forms part of the aluminium extrusion and surface-finishing project approved by the board in October 2024. Installation and commissioning of the associated surface-finishing plants are still underway.

Welspun Corp – Jordan manufacturing venture
Welspun Corp and Perma-Pipe signed an MoU with Jordan's government and the developers of the National Water Carrier Project. The parties plan to establish a joint venture for large-diameter pipe manufacturing and advanced coating facilities in Jordan. The platform will target water, oil and gas, energy and infrastructure projects across Jordan and the wider Levant region.

Asian Energy – Hydrocarbon block award
The Government awarded hydrocarbon block GK/OSDSF/GKOSN/2025 under DSF Bid Round IV to Oilmax Energy, Asian Energy's holding and amalgamating company. Oilmax will hold a 50% participating interest and operate the block, subject to signing the revenue-sharing contract. Once the proposed merger becomes effective, the block and related rights will vest in Asian Energy.

KFin Technologies – Subsidiaries merged internally
KFin's board approved the merger of WebileApps India, Hexagram Fintech and WebileApps Technology Services into the listed company. As of June 2026, the three entities had combined net worth of INR 41.86 crore and combined income of INR 20.67 crore. No new KFin shares or cash consideration will be issued because all three are wholly owned entities.

Go Digit – CCI clears amalgamation
Go Digit received the detailed CCI approval order for the proposed amalgamation of Go Digit Infoworks Services with Go Digit General Insurance. Competition approval was originally granted on 28 July 2026, with the detailed order dated 31 August. The transaction still requires approvals from NCLT Mumbai, IRDAI and shareholders.

LTTS – Smart World divestment completed
L&T Technology Services completed the transfer of its Smart World and Communication business unit to AMI Paradigm Solutions on 1 September 2026. The sale was executed under the business-transfer agreement signed on 25 March 2026. The transaction separates the non-core unit from LTTS' engineering and technology-services operations.

TVS Motor – Sales rise 21%
TVS Motor's August sales increased 21% YoY to 6,16,540 units. Two-wheeler sales rose 21% to 5,91,437 units, while domestic two-wheelers increased 18% to 4,33,796 units. Electric two-wheeler sales surged 137% to 59,453 units, and international sales grew 29% to 1,74,452 units.

Mahindra – SUV sales jump 50%
Mahindra's overall automobile sales increased 42% YoY to 1,07,648 units in August. Domestic SUV volumes rose 50% to 59,257 units, while total SUV sales including exports reached 61,167 units. Domestic commercial-vehicle sales increased 22% to 27,415 units.

Bajaj Auto – Exports drive growth
Bajaj Auto's August sales increased 28% YoY to 5,35,764 units, led by a 51% increase in exports to 2,80,056 units. Two-wheeler sales grew 30% to 4,43,748 units, while commercial-vehicle sales rose 22% to 92,016 units. April–August cumulative sales increased 29% to 24,48,692 units.

Maruti Suzuki – Sales cross one million
Maruti Suzuki sold 2,19,220 vehicles in August, up from 1,80,683 units a year earlier. Domestic sales reached 1,80,078 units, OEM supplies were 5,298 units and exports stood at 33,844 units. FY27 sales crossed one million units within five months, reaching 11,43,365 units during April–August.

Hyundai – Highest August domestic sales
Hyundai reported its highest-ever domestic August sales at 54,396 units, representing 23.6% YoY growth. Total sales, including exports, increased 8.8% to 65,796 units, while exports stood at 11,400 units. Domestic sales during April–August FY27 increased 12.6% YoY.

Escorts Kubota – Tractors grow 19%
Escorts Kubota sold 10,072 tractors in August, up 19.1% YoY, with domestic volumes rising 20.5% to 9,523 units. Tractor exports were broadly stable at 549 units versus 554 units. Construction-equipment volumes increased 16% to 435 machines, supported by infrastructure execution and government capex.

Eicher Motors – VECV sales update
VE Commercial Vehicles reported its August sales volumes across Eicher- and Volvo-branded commercial vehicles. The disclosure covers light and medium-duty trucks, heavy-duty trucks and buses, along with domestic and export performance. The update provides the operating read-through for Eicher Motors' commercial-vehicle joint venture with Volvo Group.

Coal India – Offtake grows 5.5%
Coal India's August coal production declined 5.7% YoY to 47.5 million tonnes, while coal offtake increased 5.5% to 60.6 million tonnes. April–August production fell 4.5% to 267.5 million tonnes. Cumulative offtake rose 6.7% to 322.9 million tonnes, indicating stronger dispatches despite weaker production.

Sakar Healthcare – 14 oncology approvals
Sakar received 14 new oncology-product approvals across the EU, UK and Canada through seven business partners. These include six licensed-out product authorisations—four in the EU and one each in the UK and Canada—plus additional EMA and MHRA site/product approvals. The portfolio covers cancers including breast, lung, prostate, stomach, blood and bone marrow.

Tata Elxsi – Indigenous eVTOL partnership
Tata Elxsi partnered with Sarla Aviation to accelerate the development of Shunya, an indigenous electric vertical take-off and landing aircraft. Tata Elxsi will provide aircraft design, engineering, system integration and certification support. The first flight is targeted within 18–24 months, followed by certification-related activities.

Sun Pharma – US tariff relief
Sun Pharma participated in a White House agreement covering US medicine pricing, access and domestic investment commitments. The agreement delays the application of Section 232 tariffs on Sun Pharma's innovative products for more than two years. The US contributes approximately 27% of Sun Pharma's global revenue, making the tariff relief financially relevant.

Macro / Non-Stock News

Diesel export duty cut
Government reduced export levy on diesel to INR 1/litre from INR 3/litre and revised windfall tax on domestic crude to INR 19/litre effective 1st September. The move improves export economics for refiners and reduces government intervention burden on oil companies. Positive read-through for Reliance Industries, HPCL, BPCL, IOC and private refiners.

India CAD widens on imports
India's current account deficit widened to $4.2 billion (0.5% of GDP) in Q1FY27 from $3.4 billion YoY, driven by merchandise trade deficit expanding to $86.1 billion from $68.9 billion. Higher commodity prices remain a key risk for INR and import-heavy sectors.

RBI FX intervention rises
RBI intervention pushed INR to a two-month high at 94.95/USD despite broad dollar strength. RBI's forward dollar book stood at around $137 billion in July, indicating active currency management. Positive for importers, while exporters may face currency headwinds.

G20 targets China exports
US Treasury pushed G20 nations to act against China's export surplus, subsidies and currency practices. Discussions also highlighted restrictions around Chinese exports of critical minerals. Potential implications for metals, electronics supply chains and global trade-sensitive sectors.

Japan yields trigger carry unwind
Japan's 10-year government bond yield touched 3% for the first time since 1996, raising concerns that Japanese investors may reduce overseas bond/equity exposure. A reversal in yen carry trades could impact FII liquidity into emerging markets including India.

European gas prices spike
European natural gas prices moved to 3.5-year highs amid supply disruption concerns linked to Iran-Qatar tensions. Higher energy costs are reviving inflation concerns in Europe and increasing global rate uncertainty.

India private capex revival
Private-sector capex increased 11.9% YoY in Q1FY27, while gross fixed capital formation improved to 34.3% of GDP from 31.4%. The improving investment cycle is positive for capital goods, industrials, EPC and infrastructure-linked sectors.

Bond yields threaten EM flows
Global bond sell-off intensified following hawkish US Fed commentary, with US 10-year yields moving higher and Japanese yields reaching multi-decade highs. Higher global risk-free rates could pressure FII allocations towards Indian equities and valuations of high-duration stocks.

Oil above $92 impacts India
Brent crude traded around $92.25/bbl, creating pressure on India's import bill and inflation outlook. Sustained elevated crude is particularly relevant for aviation, paints, chemicals, OMCs and other energy-intensive sectors.

Gold loses safe-haven bid
Rising global bond yields reduced demand for non-yielding assets, pushing gold lower despite geopolitical uncertainty. Bullion volatility is relevant for jewellery companies and gold-loan NBFCs through collateral values, demand and customer activity.

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