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Daily Updates

Market Commentary

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Overnight global action:

On 25th August 2026, US markets ended higher, with the S&P 500 gaining 24.3 pts (+0.32%), Dow Jones advancing by 160.0 pts (+0.30%) and Nasdaq 100 rising by 186.1 pts (+0.64%). Gift Nifty gained 27 pts (+0.11%), indicating a mildly positive opening for Indian markets.

NSE breadth remained negative with 1,672 advances against 1,842 declines, while BSE also witnessed weak participation with 2,007 advances versus 2,330 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,350 Calls and 24,300 Puts. PCR stands at 1.10.

Sensex OI peaks at 78,000 Calls and 77,500 Puts. PCR stands at 1.45.

Bank Nifty Call and Put OI both peak at 57,500 — heavy ATM congestion zone. PCR stands at 0.84.

Securities in Ban for F&O Trade:

-

Sector Performance:

NIFTY MID SELECT index grew by 0.69 % driven by PAYTM(+5.82%), INDUSTOWER(+3.47%) and DIXON(+2.88%).

NIFTY NEXT 50 index grew by 0.66 % driven by HDFCAMC(+3.06%), DIVISLAB(+2.92%) and MAZDOCK(+2.76%).

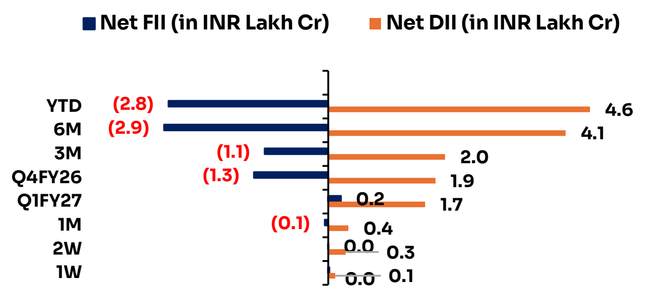
NIFTY FPI 150 index grew by 0.55 % driven by IDEA(+7.96%), PAYTM(+5.82%) and ADANIENT(+3.72%).

NIFTY MICROCAP 250 index declined by -0.43 % driven by RAIN(-7.01%), TDPOWERSYS(-6.38%) and ATLANTAALE(-5.63%).

NIFTY SMALLCAP 500 index declined by -0.25 % driven by HINDCOPPER (-7.45%), RAIN(-7.01%) and TDPOWERSYS(-6.38%).

NIFTY SMLCAP 250 index declined by -0.15 % driven by HINDCOPPER (-7.45%), IIFL(-4.74%) and BALRAMCHIN(-4.03%).

Fund Flow 25th Aug	Buy	Sell	Net
FII/FPI (INR Cr)	12,333	11,151	1,182
DII (INR Cr)	15,337	12,844	2,493



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,507	0.1%	-6.7%	22.2
Sensex 30	77,656	0.4%	-8.9%	20.3
Nifty 50	24,335	0.5%	-6.9%	22.1
India VIX	11	-4.6%	16.1%	
Nifty Bank	57,514	0.0%	-3.5%	16.9
Nifty Next 50	74,509	0.7%	7.4%	74.5
Nifty 500	23,612	0.4%	-1.1%	22.2
Nifty Mid 100	64,163	0.5%	6.1%	33.0
Nifty Small 250	18,347	-0.2%	10.0%	30.9
USD/INR	95.4	-0.35%	6.1%	
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	7,677	0.3%	12.2%	33.2
Dow Jones	53,577	0.3%	11.5%	25.9
Nasdaq 100	29,209	0.6%	15.7%	48.0
FTSE 100	10,886	0.3%	9.6%	17.2
CAC 40	8,439	-0.2%	3.6%	24.7
DAX	26,266	0.6%	7.3%	27.4
Nikkei 225	65,510	-0.5%	30.2%	35.0
Hang Seng	25,511	0.0%	-0.5%	12.4
Shanghai Comp	3,889	0.2%	-2.0%	17.6
KOSPI	6,755	0.2%	60.5%	33.4
S&P/ASX 200	9,184	0.2%	5.4%	24.2

Stocks in the News

LARSEN & TOUBRO (CMP: 4119, MARKET CAP: 566719 Cr., SECTOR: ENGINEERING & CONSTRUCTION)

NSE filing

L&T's Renewables business secured a ₹5,000–10,000 crore EPC order for three battery-energy-storage projects in the Middle East. The projects will provide 6 GWh of aggregate storage capacity and include grid interconnections, pooling substations and underground cabling.

HERO MOTOCORP (CMP: 5624, MARKET CAP: 112569 Cr., SECTOR: AUTOMOBILES – 2W)

NSE filing

Hero MotoCorp subscribed to 76.19 lakh convertible warrants of Ather Energy at ₹1,260 each, representing a total investment of ₹959.99 crore. Hero paid ₹239.99 crore, or 25% of the consideration, upfront; the balance is payable upon conversion. The transaction strengthens Hero's strategic exposure to the electric two-wheeler market.

HINDUSTAN COPPER (CMP: 533, MARKET CAP: 51509 Cr., SECTOR: METALS & MINING)

NSE filing

The Government of India decided to exercise the oversubscription option for 2.90 crore shares after strong institutional demand for the OFS. Combined with the base offer, the government may divest up to 6% equity at a floor price of ₹514 per share. The non-retail portion was subscribed over three times.

SUZLON ENERGY (CMP: 47, MARKET CAP: 63745 Cr., SECTOR: WIND-ENERGY EQUIPMENT)

NSE filing

Suzlon secured a 250 MW wind-turbine order from Torrent Green Energy, its sixth order from the Torrent Group. It will supply and install 76 S144 turbines of 3.3 MW each, along with grid integration and long-term O&M services. The order takes Suzlon's FY27 order wins to approximately 1.1 GW and its cumulative partnership with Torrent beyond 1.3 GW.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	29,217	0.4%	3.6%	24.1
Nifty IT	30,772	0.6%	-18.8%	24.0
Nifty Fin Ser	26,247	0.3%	-5.0%	17.1
Nifty Pharma	26,564	0.9%	16.9%	43.7
Nifty Services	31,000	0.5%	-7.9%	34.1
Nifty Cons Dur	40,829	0.9%	11.1%	55.3
Nifty PSE	9,797	0.2%	-0.6%	10.3
Nifty FMCG	47,707	0.4%	-14.0%	32.9
Nifty Pvt Bank	27,447	-0.2%	-4.4%	10.3
Nifty PSU Bank	8,604	0.8%	0.8%	14.1
Nifty Cons	12,094	0.7%	-1.6%	42.7
Nifty Energy	38,311	-0.1%	8.5%	12.2
Nifty Health	16,597	1.1%	13.4%	39.7
Nifty India Mfg	16,580	0.4%	7.6%	30.9
Nifty Metal	13,372	-0.1%	19.7%	24.0
Nifty Oil & Gas	11,215	0.2%	-8.3%	17.2

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
VOLTAS	15.5	0.6
HINDPETRO	14.9	0.8
LT	13.5	0.7
NAUKRI	13.2	0.2
COCHINSHIP	10.5	0.2
Short		
HEROMOTOCO	12.9	-0.5
SBILIFE	12.3	-0.1
BANDHANBNK	11.7	-0.6
ONGC	10.4	-0.8
CAMS	9.7	-0.9
Long Unwinding		
DALBHARAT	-11.5	-2.1
IRFC	-11.0	-0.6
GODFRYPHLP	-10.7	-0.7
NAM-INDIA	-7.0	-1.1
DMART	-4.8	-0.6
Short Covering		
FINNIFTY	-22.3	0.3
ANGELONE	-10.1	5.4
SHREECEM	-9.7	1.9
IREDA	-7.9	5.7
INDIANB	-7.0	1.4

ACME SOLAR HOLDINGS (CMP: 399, MARKET CAP: 28225 Cr., SECTOR: RENEWABLE POWER)

NSE filing

ACME Solar won 300 MW contracted capacity in SECI's 1,500 MW assured-peak-power tender at a tariff of ₹6.00 per unit. The project will require approximately 1,200 MWh of battery storage, increasing ACME's BESS pipeline. The award is subject to execution of the PPA and other customary conditions.

Commodities	CMP	1D	YTD
Gold ($)	4,645	-0.3%	7.3%
Silver ($)	68.5	-0.1%	-5.3%

Currency	CMP	1D	YTD
USD/INR	95.4	−0.35%	6.07%
EUR/INR	111.2	-0.01%	5.23%
GBP/INR	129.9	-0.01%	7.29%
JPY/INR	0.6	-0.68%	4.23%
EUR/USD	1.2	-0.01%	-0.65%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
DALBHARAT	1,824.00	1,779.10	2.46
GAIL	175.50	172.07	1.95
UNOMINDA	1,253.40	1,230.50	1.83
IREDA	120.61	118.45	1.79
360ONE	1,210.00	1,188.90	1.74

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
BAJAJ-AUTO	11,927	11,927	11,863	11-Aug-26
DIVISLAB	8,745	8,745	8,674	12-Aug-26
SIEMENS	4,091	4,149	4,118	24-Aug-26
AUBANK	1,129	1,144	1,114	24-Aug-26
IPCALAB	1,935	1,959	1,945	17-Aug-26

52 Week Low

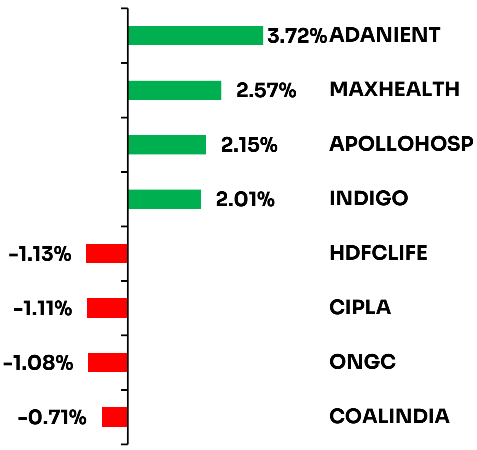
Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
DABUR	395	392	396	24-Aug-26
RVNL	218	217	220	28-Jul-26
IRCTC	483	481	481	24-Aug-26
PIIND	2,508	2,453	2,457	12-Aug-26
PGHH	8,099	8,076	8,112	24-Aug-26

Volume Shockers

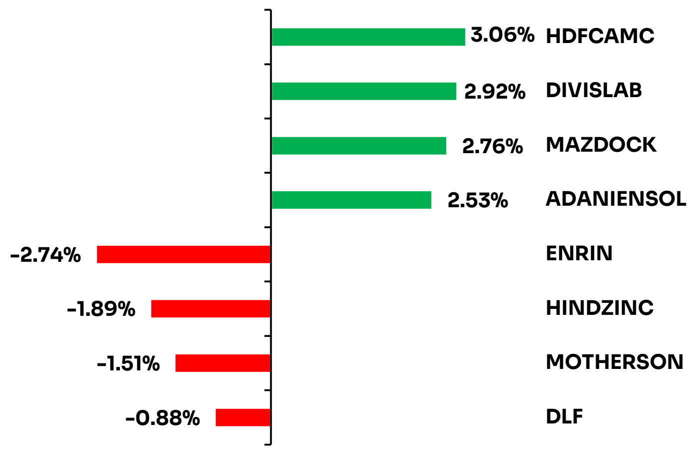
Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
FMGOETZE	20,771	34	48	531
FACT	34,307	139	127	874
BOROLTD	18,594	135	91	256
ONIXSOLAR	856	9	9	276
MADRASFERT	1,345	45	46	70
ARVEE	35	1	11	182
NITCO	20,562	714	725	95
LICNMID100	106	4	5	65
ITADD	1,400	51	41	32
HPIL	41	2	2	128
INSUREIETF	5,273	226	711	15
PARADEEP	51,534	2,261	2,375	160
RCF	18,100	839	762	124
MEIL	619	29	27	276
STEELCITY	141	7	10	89
OPTIFIN	507	25	25	14
RAMBHAJO	9,924	523	512	212
GANGAFORGE	18,773	990	11,231	2
RPTECH	4,682	252	259	787
ANSALBU	5	0	0	74
NFL	9,079	540	574	72
ADVENTHTL	1,730	104	87	143
GODREJAGRO	3,499	229	261	611
SHAH	54,859	3,767	4,773	3
TERAI	1	0	0	128

Top Gainers & Losers

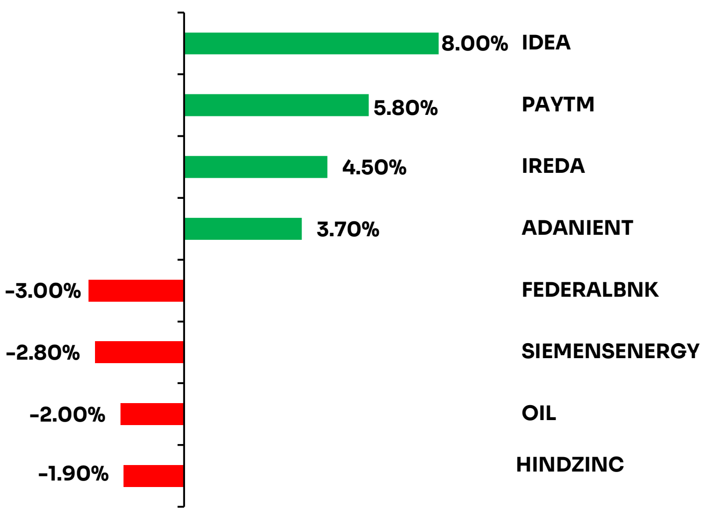
Nifty 50



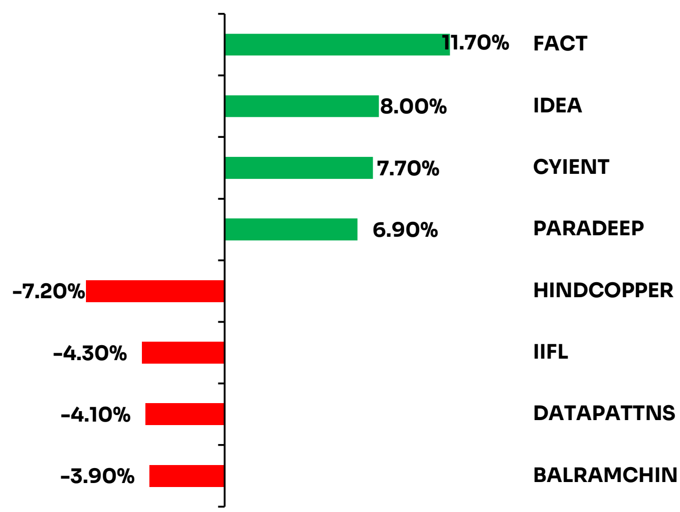
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ASPIRE	ARUNA AGARWAL	SELL	108	14
ASPIRE	EXMARK DISTRIBUTORS PRIVATE LIMITED	BUY	98	14
ATALREAL	ALTIZEN VENTURES LLP	BUY	637	34
ATALREAL	ALTIZEN VENTURES LLP	SELL	1065	34
ATALREAL	SHARBHANG COMMERCIAL COMPANY PRIVATE LIMITED	SELL	650	34
ATALREAL	VIMLA DEVI PRATAPMAL JAIN	BUY	730	34
ATALREAL	VISHAL MAHESH WAGHELA	SELL	20	34
ATALREAL	VISHAL MAHESH WAGHELA	SELL	300	34
ATALREAL	VISHAL MAHESH WAGHELA	BUY	630	34
ATALREAL	VISHAL MAHESH WAGHELA	BUY	1153	34
BANG	IRAGE BROKING SERVICES LLP	SELL	75	35
BANG	IRAGE BROKING SERVICES LLP	BUY	302	35
BANG	ORION STOCKS LTD	BUY	96	35
BANG	ORION STOCKS LTD	SELL	329	35
BIOFILCHEM	IRAGE BROKING SERVICES LLP	SELL	45	33
BIOFILCHEM	IRAGE BROKING SERVICES LLP	BUY	247	33
BIOFILCHEM	ORION STOCKS LTD	BUY	59	33
BIOFILCHEM	ORION STOCKS LTD	SELL	283	33
BLBLIMITED	ACN FINANCIAL SERVICES LTD	SELL	332	16
BOROLTD	MICROCURVES TRADING PRIVATE LIMITED	BUY	826	273
BOROLTD	MICROCURVES TRADING PRIVATE LIMITED	SELL	826	274
BOROLTD	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1069	273
BOROLTD	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1069	273
BURNPUR	PRITHVI FINMART PRIVATE LIMITED	SELL	49	13
BURNPUR	PRITHVI FINMART PRIVATE LIMITED	BUY	97	13
CREDENT	PRIJAL TRADEFIN LLP	SELL	28	352
CREDENT	PRIJAL TRADEFIN LLP	BUY	92	338
DJML	NEO APEX SHARE BROKING SERVICES LLP	BUY	200	73
DJML	NEO APEX SHARE BROKING SERVICES LLP	SELL	200	75
DURLAX	ARYAMAN CAPITAL MARKETS LIMITED	BUY	146	67
FASCINATE	ZAMAIRA DEVELOPERS LLP	BUY	138	109
FMGOETZE	BLITZQUANT RESEARCH LLP	BUY	327	540
FMGOETZE	BLITZQUANT RESEARCH LLP	SELL	327	540
FMGOETZE	CLT RESEARCH TECH PRIVATE LTD	SELL	340	543
FMGOETZE	CLT RESEARCH TECH PRIVATE LTD	BUY	340	543
FMGOETZE	IRAGE BROKING SERVICES LLP	SELL	352	542
FMGOETZE	IRAGE BROKING SERVICES LLP	BUY	405	542
FMGOETZE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	584	541
FMGOETZE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	584	541
FMGOETZE	MICROCURVES TRADING PRIVATE LIMITED	BUY	989	541
FMGOETZE	MICROCURVES TRADING PRIVATE LIMITED	SELL	989	542
FMGOETZE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1023	541
FMGOETZE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1023	541
FMGOETZE	QE SECURITIES LLP	SELL	294	538
FMGOETZE	QE SECURITIES LLP	BUY	294	538

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
FMGOETZE	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	291	539
FMGOETZE	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	291	539
GANGAFORGE	NEO APEX SHARE BROKING SERVICES LLP	SELL	2111	2
GANGAFORGE	NEO APEX SHARE BROKING SERVICES LLP	BUY	10448	2
GATECH	EBISU GLOBAL OPPORTUNITIES FUND LIMITED	SELL	57148	1
GENESYS	NEO APEX SHARE BROKING SERVICES LLP	BUY	184	214
GENESYS	NEO APEX SHARE BROKING SERVICES LLP	SELL	228	214
LAMBODHARA	INDUR THANWERDAS DADLANI	BUY	83	140
MANYAVAR	SBI MUTUAL FUND	BUY	3631	537
MANYAVAR	SBI MUTUAL FUND	SELL	3631	537
MEDIASSIST	NTASIAN DISCOVERY MASTER FUND	BUY	400	357
NARMADA	MSB E TRADE SECURITIES LIMITED	SELL	519	14
NARMADA	MSB E TRADE SECURITIES LIMITED	BUY	519	15
NIMBSPROJ	NIVL IT SERVICES PRIVATE LIMITED	BUY	72	173
NIMBSPROJ	NIVL IT SERVICES PRIVATE LIMITED	SELL	98	173
NIMBSPROJ	NIVL LEARNING EDUCATION PRIVATE LIMITED	BUY	70	173
NIMBSPROJ	NIVL LEARNING EDUCATION PRIVATE LIMITED	SELL	161	174
NIMBSPROJ	URJA INVESTMENT PTE LTD	BUY	149	174
ONIXSOLAR	ONIX RENEWABLE LIMITED	BUY	640	276
ONIXSOLAR	YAVA CORP GLOBAL LIMITED	SELL	190	276
ORIENTHOT	SUPREMUS PROJECTS LLP	SELL	1105	142
PARSVNATH	KINGSMAN WEALTH FUND PCC - KIF II	SELL	4301	1
PARSVNATH	NEO APEX SHARE BROKING SERVICES LLP	BUY	5955	1
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	53487	11
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	53487	11
QUADFUTURE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	298	426
QUADFUTURE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	299	426
QUADFUTURE	QE SECURITIES LLP	SELL	316	426
QUADFUTURE	QE SECURITIES LLP	BUY	320	425
RAMBHAJO	HRTI PRIVATE LIMITED	SELL	314	225
RAMBHAJO	HRTI PRIVATE LIMITED	BUY	325	224
RAMBHAJO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	442	225
RAMBHAJO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	456	225
RAMBHAJO	MICROCURVES TRADING PRIVATE LIMITED	BUY	268	229
RAMBHAJO	MICROCURVES TRADING PRIVATE LIMITED	SELL	268	229
RAMBHAJO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	267	226
RAMBHAJO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	267	226
RAMBHAJO	QE SECURITIES LLP	SELL	458	225
RAMBHAJO	QE SECURITIES LLP	BUY	460	225
RAMBHAJO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	182	237
RAMBHAJO	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	232	235
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	261	267
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	391	265
RATNAVEER	HRTI PRIVATE LIMITED	BUY	227	269
RATNAVEER	HRTI PRIVATE LIMITED	SELL	401	271

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SHAH	DHANJIT REAL TRADE LLP	BUY	14524	3
SHAH	DHANJIT REAL TRADE LLP	SELL	15861	3
SHANKESH	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	1863	101
SHANKESH	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	1868	101
SHANKESH	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	1046	102
SHANKESH	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	1046	102
SHANKESH	GADGIL RENU GOVIND	BUY	945	101
SHANKESH	GOLDMINE STOCKS PRIVATE LIMITED	SELL	1562	103
SHANKESH	GOLDMINE STOCKS PRIVATE LIMITED	BUY	1562	103
SHANKESH	GRT STRATEGIC VENTURES LLP	SELL	2287	102
SHANKESH	GRT STRATEGIC VENTURES LLP	BUY	2287	102
SHANKESH	IRAGE BROKING SERVICES LLP	BUY	2373	102
SHANKESH	IRAGE BROKING SERVICES LLP	SELL	2451	102
SHANKESH	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	1520	101
SHANKESH	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	1520	101
SHANKESH	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	2136	101
SHANKESH	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	2312	101
SHANKESH	KABRA KAILASH	SELL	917	99
SHANKESH	KABRA KAILASH	BUY	917	101
SHANKESH	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	SELL	1172	103
SHANKESH	MARWADI CHANDARANA INTERMEDIARIES BROKERS PR	BUY	1177	103
SHANKESH	MICROCURVES TRADING PRIVATE LIMITED	BUY	1698	102
SHANKESH	MICROCURVES TRADING PRIVATE LIMITED	SELL	1698	102
SHANKESH	NIRAJ RAJNIKANT SHAH	BUY	2300	100
SHANKESH	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	3514	102
SHANKESH	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	3514	102
SHANKESH	NOMURA SINGAPORE LIMITED	SELL	1618	97
SHANKESH	P.N. GADGIL & SONS LIMITED	BUY	1375	101
SHANKESH	PEER GLOBAL TRADE PRIVATE LIMITED	SELL	882	100
SHANKESH	PEER GLOBAL TRADE PRIVATE LIMITED	BUY	882	101
SHANKESH	PRARAMBH SECURITIES PVT. LTD.	BUY	1100	100
SHANKESH	PURE BROKING PRIVATE LIMITED	SELL	1359	103
SHANKESH	PURE BROKING PRIVATE LIMITED	BUY	1374	103
SHANKESH	RAJASTHAN GLOBAL SECURITIES PRIVATE LIMITED	SELL	13	103
SHANKESH	RAJASTHAN GLOBAL SECURITIES PRIVATE LIMITED	BUY	743	100
SHANKESH	SHARE INDIA SECURITIES LIMITED	SELL	969	101
SHANKESH	SHARE INDIA SECURITIES LIMITED	BUY	979	102
SHANKESH	VORA FINANCIAL SERVICES PVT LTD	BUY	794	103
SHANKESH	VORA FINANCIAL SERVICES PVT LTD	SELL	794	101
SHANKESH	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	BUY	955	100
SHANKESH	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED	SELL	955	100
SILLYMONKS	PRASAD A.RAJENDRA	BUY	73	16
SUN-RE	MAHESH PRAKASH MHAPANKAR	BUY	34	2
SUN-RE	PARESHKUMAR JAMANALAL JIVARANI	SELL	26	1
SUN-RE	SHARDABEN DALSUKHRAM THAKKAR	SELL	50	2

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SUNSHINE	AMRAPALI CAPITAL AND FINANCE SERVICES LTD	BUY	1500	370
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	1921	371
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	2381	383
SUNSHINE	BLITZQUANT RESEARCH LLP	BUY	158	379
SUNSHINE	BLITZQUANT RESEARCH LLP	SELL	158	379
SUNSHINE	GOLDMINE STOCKS PRIVATE LIMITED	BUY	198	378
SUNSHINE	GOLDMINE STOCKS PRIVATE LIMITED	SELL	198	378
SUNSHINE	GRT STRATEGIC VENTURES LLP	BUY	561	380
SUNSHINE	GRT STRATEGIC VENTURES LLP	SELL	561	380
SUNSHINE	IRAGE BROKING SERVICES LLP	BUY	367	380
SUNSHINE	IRAGE BROKING SERVICES LLP	SELL	413	378
SUNSHINE	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	263	376
SUNSHINE	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	263	376
SUNSHINE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	228	378
SUNSHINE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	244	377
SUNSHINE	MICROCURVES TRADING PRIVATE LIMITED	SELL	175	374
SUNSHINE	MICROCURVES TRADING PRIVATE LIMITED	BUY	175	374
SUNSHINE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	466	380
SUNSHINE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	466	380
SUNSHINE	PURE BROKING PRIVATE LIMITED	SELL	152	381
SUNSHINE	PURE BROKING PRIVATE LIMITED	BUY	165	380

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price

No Block Deals Reported

Event Calendar – Corporate Action 26th August 2026

Company	Purpose
IRB InvIT Fund	Fund Raising
Juniper Green Energy Limited	Financial Results
Mold-Tek Packaging Limited	Dividend/Bonus/Other business matters
Keystone Realtors Limited	Fund Raising/Other business matters
Simbhaoli Sugars Limited	Financial Results
Vikas EcoTech Limited	Financial Results/Other business matters

Global Macro Events 26th August 2026

Event	Previous	Forecasted
USA		
ADP Employment Change Weekly	9.5K	
Building Permits Final JUL	1.374M	1.443M
Building Permits MoM Final JUL	-0.03	0.05
Redbook YoY AUG/22	0.08	
S&P/Case-Shiller Home Price YoY JUN	0.02	0.02
House Price Index JUN	442.40	442.80
House Price Index MoM JUN	0.00	0.00
House Price Index YoY JUN	0.02	0.02
S&P/Case-Shiller Home Price MoM JUN	0.01	0.00
CB Consumer Confidence AUG	90.20	90.90
New Home Sales JUL	0.678M	0.62M
New Home Sales MoM JUL	0.08	-0.01
Richmond Fed Manufacturing Index AUG	5.00	6.00
Richmond Fed Manufacturing Shipments Index AUG	8.00	7.00
Richmond Fed Services Revenues Index AUG	-3.00	-1.00
6-Week Bill Auction	0.04	
2-Year Note Auction	0.04	
Money Supply JUL	$23.15T	
API Crude Oil Stock Change AUG/21	-3.28M	
MBA 30-Year Mortgage Rate AUG/21	0.07	
MBA Mortgage Applications AUG/21	0.00	
MBA Mortgage Market Index AUG/21	247.70	
Germany		
GDP Growth Rate QoQ Final Q2	0.00	0.00
GDP Growth Rate YoY Final Q2	0.01	0.01
Ifo Business Climate AUG	86.70	87.00
Ifo Current Conditions AUG	86.50	86.90
Ifo Expectations AUG	86.8	87.10
2-Year Schatz Auction	0.03	
15-Year Bund Auction	0.03	
Great Britain		
Treasury Gilt 2033 Auction	0.05	
CBI Distributive Trades AUG	-26.00	-21.00
India		
M3 Money Supply YoY AUG/15	0.15	

Daily Updates

Nifty & Bank Spot – Pivot Levels 26/08/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24334.55	24188	24042	23969	24407	24480	24626
Bank Nifty	57514.20	57279	57044	56857	57701	57888	58123

Gujarat Industries Power Company Ltd – Technical Stock Call – 26/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
GIPCL	BUY	190.72	262	(183-176) -(168-162)	153

Sector: Power (INE162A01010)

About: Gujarat Industries Power Company Limited (GIPCL) is a power generation company promoted by the Government of Gujarat and leading state PSUs. It operates a diversified portfolio of lignite, gas, solar, and wind power plants, making it one of Gujar at's key electricity producers. The company is also expanding its renewable energy capacity while maintaining captive lignite mining operations.

View – Medium Term Bullish

The stock commenced its downtrend from 268.50 (DEC 24).
Stock started trading below the averages & forming lower tops gradually reached a low of 119.90 (MAR 26).
During the correction phase, the stock traded within a descending channel and hovered around its key moving averages before b reaking below the 200-day SMA. The breach of this long-term support triggered fresh selling pressure, leading to an extended decline and weaker price structure.

Later, Buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the st ock has given a **Descending Channel Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 191.25 (AUG 26), which is higher than the previous swing highs.

Indicators like MACD, PVT & Aroon suggests positive crossover.

The stock is trading above 200 SMA. Also the 200 SMA is in rising mode.

Target of **262** is expected with lower support levels at **(183-176)-(168-162)** in case of intermediate fall.

A stop loss at **153** is to be followed for the trade.

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

Adani Enterprises Ltd – Technical Stock Call – 26/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
ADANIENT	BUY	3110	3670	(3036-2990)-(2940-2890)	2830

Sector: Diversified Infrastructure - Infrastructure, Energy & Incubation (INE423A01024)

About: Adani Enterprises Limited (AEL) is the flagship company of the Adani Group and acts as an incubator for new infrastructure and energy businesses. Rather than being a single-business company, it builds, scales, and eventually demerges high-growth businesses across airports, roads, mining, data centers, green hydrogen, defence, and industrial manufacturing.

View – Short Term Bullish

The stock commenced its downtrend from 3219.7 (JUL 26).

Forming lower tops, the stock traded below the averages & extended its decline to a low of 2932.8 (AUG 26).

However, during the correction phase, the stock entered into a consolidation band during the period JUL 26_AUG 26, while taki ng support on trend line.

The stock attracted buying interest & commenced its up move reaching a high of 3058.6 (AUG 26) & recently, after forming high er 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 3110 (AUG 26), which is higher than the previous swing highs.

Indicators like MACD, PVT & Aroon suggests positive crossover.

Target of **3670** is expected with lower support levels at **(3036-2990)-(2940-2890)** in case of intermediate fall.

A stop loss at **2830** is to be followed for the trade.

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Stock specific news

Sudarshan Chemical: Swiss dyes acquisition
Sudarshan Chemical agreed to acquire Clariant's aluminium-dyes plant in Muttenz, Switzerland, for a base consideration of CHF 7 million, plus inventory value. The asset purchase supports continued production of dyes sold under brands including Sanodal and Sanodure.

Himadri Speciality: Additional Sicona investment
Himadri made an additional investment in Australia-based Sicona Battery Technologies by subscribing to compulsorily convertible notes. Sicona owns silicon-carbon anode technology used to improve lithium-ion battery performance; Himadri already has a technology-licensing arrangement for manufacturing the material in India.

Jaykay Enterprises: BrahMos component order
Step-down subsidiary Allen Reinforced Plastics received an order from BrahMos Aerospace. The contract covers the manufacture and supply of specialised composite components used in defence applications. It represents another order from BrahMos for Jaykay's defence-materials business.

NBCC: ₹121.74 crore orders
NBCC received work orders aggregating approximately ₹121.74 crore in the ordinary course of business. The orders add to the company's project-management and construction order book and will be executed according to the schedules specified by the respective clients.

NBCC: Noida units auctioned
NBCC completed the e-auction of residential units in Tower No. 6 of Aspire Silicon City, Sector 76, Noida. The transaction monetises inventory linked to the stalled-project completion framework and supports recovery of project execution costs.

Sai Parenterals: Pharmaceutical order secured
Sai Parenterals secured an approximately ₹204 crore order from an Australian pharmacy chain. The contract covers the supply of pharmaceutical products to the customer; the detailed delivery schedule was not disclosed.

Advait Energy: MPPTCL order secured
Advait Energy Transitions received a ₹134.62 crore turnkey contract from Madhya Pradesh Power Transmission Company Ltd. The order covers Emergency Restoration System-related transmission infrastructure; the filing provides the stipulated execution schedule.

Aptech: Training mandate received
Aptech secured a work order covering the delivery of education and skill-development services. The mandate includes implementation and training responsibilities under the customer's prescribed scope, adding to Aptech's institutional training business.

ARSS Infra: Construction order received
ARSS Infrastructure Projects received a ₹19.03 crore work order from East Coast Railway. The contract relates to railway infrastructure works; the execution period is governed by the terms of the railway order.

Deepak Nitrite: Subsidiary order received
Deepak Nitrite disclosed an order received by subsidiary Deepak Chem Tech Ltd. from a statutory authority. The filing provides the nature of the alleged non-compliance and the resulting financial implication; the subsidiary is assessing the appropriate response or appeal.

BMW Ventures: New supply order
BMW Ventures secured a new order under its steel-products distribution and supply operations. The filing identifies the customer, order value and execution schedule; the contract provides incremental revenue visibility for the company.

United Breweries: Heineken Silver launch
United Breweries launched Heineken Silver in an additional market as part of its premium-beer expansion. The product has a smoother and less-bitter positioning than conventional lager and is intended to expand Heineken's addressable premium-consumer base in India.

SWELECT Energy: 10 MW commissioned
Subsidiary ESG Green Energy Pvt. Ltd. commissioned a 10 MW solar-power plant at Nedumpirai Village, Cheyyar Taluk, Tamil Nadu, on 24 August 2026. The commissioning adds operational generating capacity and enables the project to begin commercial power production.

Fractal Analytics: India unit established
Fractal established a dedicated India Business Unit to address rising demand from large Indian enterprises. The unit will focus on enterprise AI, analytics and digital-transformation engagements, creating a separate go-to-market structure for domestic customers.

Canara HSBC: GIFT City distribution
Canara HSBC Life executed a corporate-agency agreement with HSBC's International Financial Services Centre Banking Unit. The arrangement will enable distribution of the insurer's products through HSBC IBU in GIFT City, expanding access to eligible international and IFSC customers.

Sonata Software: Subsidiary merger effective
The merger of a wholly owned subsidiary into Sonata Software became effective after completion of the required approvals and filings. The subsidiary's assets, liabilities and operations will consequently be consolidated directly with the parent company.

Gandhi Tubes: ₹900 buyback
Gandhi Special Tubes issued the letter of offer for a tender-route buyback of up to 8,68,100 shares at ₹900 per share. The maximum buyback consideration is approximately ₹78.13 crore, excluding transaction costs and applicable taxes.

Sadbhav Engineering: Debt restructuring progresses
Sadbhav Engineering signed a deed of accession to the Master Restructuring Agreement, bringing additional debt or stakeholders within the agreed restructuring framework. The company also allotted 16,786 non-convertible securities pursuant to the restructuring arrangement.

Jana SFB: Merger report clarified
Jana Small Finance Bank responded to reports concerning Federal Bank potentially acquiring its promoter's 16.9% holding. The bank said it evaluates strategic opportunities in the ordinary course but did not confirm that a binding transaction or merger agreement had been executed.

Ritco Logistics: TrucksUp funding closed
Step-down subsidiary TrucksUp Solutions Pvt. Ltd. completed a growth-financing round. The capital is intended to support expansion of its technology-led trucking and logistics platform, including services such as freight aggregation, FASTag and fleet solutions.

Vibhor Steel: Land acquisition approved
Vibhor Steel Tubes approved an agreement for the acquisition of land intended for its business and manufacturing requirements. The transaction provides space for operational or capacity expansion, subject to completion of the stated conditions and documentation.

Prataap Snacks: Acquisition update disclosed
Prataap Snacks provided an update on its previously announced acquisition transaction. The disclosure covers progress toward completion and the status of applicable conditions and approvals; investors should distinguish this from the initial acquisition announcement.

SPR Auto: Renewable investment approved
SPR Auto Technologies agreed to subscribe to equity shares of a Sunsure Energy group entity. The investment is connected with procurement of renewable power for the company's operations and is intended to reduce conventional-energy consumption and electricity costs.

Baazar Style: New store opened
Baazar Style Retail opened another retail store, expanding its physical network in the value-fashion and general-merchandise segment. The new outlet increases the company's selling area and strengthens its presence in its targeted regional market.

CarTrade Tech: Consumer CEO exits
Banwari Lal Sharma, CEO of CarTrade Tech's Consumer Business, resigned with effect from 25 August 2026. His exit represents a senior-management change in the division housing the company's consumer-facing automotive platforms.

Max Financial: SEBI order received
Max Financial Services received SEBI's final order relating to the show-cause notice issued on 24 October 2024. The order concludes the regulator's adjudication on the matters covered by that notice and sets out the directions applicable to the concerned parties.

CEAT: CCI proceedings update
CEAT disclosed an update concerning orders passed by the Competition Commission of India. The development relates to competition-law proceedings involving tyre manufacturers; the company has set out the status of the orders and its available legal remedies.

Bharti Airtel: Regulatory order received
Bharti Airtel received an order from a regulatory or government authority under Regulation 30 disclosure requirements. The filing specifies the authority, alleged non-compliance and financial implication; Airtel is evaluating the order and the available appellate remedies.

AstraZeneca Pharma: Betaloc court order
AstraZeneca Pharma disclosed a Delhi High Court order concerning Betaloc, one of its cardiovascular brands. The litigation relates to rights and commercial issues surrounding the product; the order determines the current position pending further legal proceedings.

Wockhardt: Customs adjudication order
Wockhardt received an adjudication order from the Commissioner of Customs, Nhava Sheva-II, JNCH. The order concerns a customs-related matter and specifies the duty, interest or penalty implications; the company is reviewing the decision and available legal recourse.

Macro / Non-Stock News

Indian Rupee Strengthens as Brent Crude Falls
The rupee rose to a more than one-week high as Brent crude declined by more than 3%. Lower oil prices reduce pressure on India's import bill and inflation outlook. RBI intervention and global dollar movement remain important determinants of near-term currency direction.

India Inc Equity Fund Raising Crosses INR 1.11 Lakh Crore
Indian companies raised more than INR 1.11 lakh crore through IPOs, QIPs and other equity-market transactions during July and August. Strong domestic liquidity supported fundraising despite volatile equity markets. The trend demonstrates continued depth in India's primary capital market.

Iran Sanctions Remain a Key Oil-Market Risk
Oil markets remained focused on the potential supply implications of expanded US measures targeting Iran. Investors are balancing geopolitical supply risks against concerns regarding global demand. Brent crude remains particularly important for India's inflation and current-account outlook.

Copper Prices Face Upside Risk From US Tariff Threats
Potential additional US import tariffs could push copper prices toward record levels despite the absence of a global physical shortage. Traders may reposition inventories around potential tariff boundaries. Policy-driven supply distortions could increase industrial-metal volatility.

US-Canada Trade Tensions Increase Uncertainty
Trade tensions between the US and Canada continue to create uncertainty regarding global growth and supply chains. Additional tariff measures could affect automobiles and other cyclical sectors. The development remains a downside risk for global economic forecasts.

Technology Stocks Remain Volatile
Global technology stocks remain sensitive to earnings expectations and concerns surrounding AI-related valuations. Corporate capital expenditure on artificial intelligence is under increasing investor scrutiny. Technology-sector performance continues to influence broader global risk appetite.

European Equities Gain on Softer Sanctions Concerns
European shares rose as investors concluded that the latest geopolitical measures may not immediately disrupt global energy supply. Defence stocks remained relatively supported by geopolitical uncertainty. Markets continue to price geopolitical risks selectively rather than through broad selling.

Japanese Bond Funds Receive Record Inflows
Japanese bond funds have attracted record inflows as higher yields increasingly attract global investors. The trend reflects a broader reassessment of fixed-income opportunities. Rising Japanese yields could influence global capital allocation and currency flows.

Indian Banks Continue Offshore Dollar Fund Raising
Indian banks continue to access offshore dollar markets to diversify funding sources. Increased international issuance demonstrates foreign investor confidence in Indian financial institutions. Funding costs and hedging expenses remain important considerations.

Global Bond Markets Remain Sensitive to Elevated Yields
Elevated global bond yields continue to influence equity valuations and capital flows. Emerging markets remain particularly sensitive to changes in US yields and the dollar. Sustained high yields could constrain further valuation expansion.

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