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Daily Updates

Market Commentary

Overnight global action:
On 20th August 2026, US markets delivered a negative performance with S&P 500 declining by 66.32 pts (-0.86%), Dow Jones declining by 700.75 pts (-1.31%) and Nasdaq 100 declining by 212.86 pts (-0.72%). Gift Nifty declined by 4.50 pts (-0.02%), indicating Indian markets will open flat to marginally negative.

Advance-Decline ratio on NSE stood at 2,106:1,402 and on BSE at 2,373:1,951, indicating positive market breadth with a bullish bias across both exchanges.

Index Options Data Analysis:
Sensex max Call OI at 77,600 and Put OI at 77,500 with PCR of 1.076
Nifty max Call OI at 24,500 and Put OI at 24,000 with PCR of 1.209
Bank Nifty max Call OI at 58,000 and Put OI at 57,000 with PCR of 0.885

Securities in Ban for F&O Trade:
BANDHANBNK, MANAPPURAM, SAIL

Sector Performance:

NIFTY SMLCAP 100 index grew by 0.68% driven by NETWEB (+7.00%), BRIGADE (+6.50%) and MEESHO (+6.65%).

NIFTY 50 index grew by 0.64% driven by ETERNAL (+2.48%), SHRIRAMFIN (+2.01%) and KOTAKBANK (+1.82%).

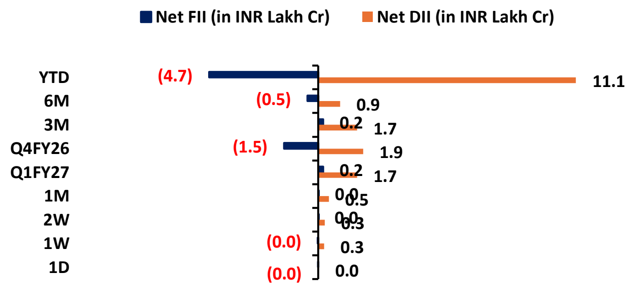
NIFTY 100 index grew by 0.59% driven by MUTHOOTFIN (+3.88%), HINDZINC (+3.03%) and HDFCAMC (+2.83%).

NIFTY SMLCAP 250 index grew by 0.58% driven by BALRAMCHIN (+17.90%), NETWEB (+7.00%) and MMTC (+6.82%).

NIFTY SMLCAP 50 index grew by 0.57% driven by COHANCE (+6.34%), REDINGTON (+4.09%) and PIRAMALFIN (+3.33%).

NIFTY 200 index grew by 0.56% driven by MCX (+5.15%), MUTHOOTFIN (+3.88%) and GLENMARK (+3.85%).

Fund Flow	Buy	Sell	Net
FII/FPI	11,412	11,995	-583
DII	16,933	13,395	3,538



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,293	0.0%	-7.6%	22.0
Sensex 30	77,538	0.8%	-9.0%	20.3
Nifty 50	24,232	0.6%	-7.3%	22.0
India VIX	11	-4.6%	14.1%	
Nifty Bank	57,496	0.5%	-3.5%	16.9
Nifty Next 50	74,194	0.4%	7.0%	74.2
Nifty 500	23,513	0.5%	-1.5%	22.1
Nifty Mid 100	63,672	0.4%	5.3%	32.8
Nifty Small 250	18,339	0.6%	9.9%	30.9
USD/INR	95.7	-0.1%	6.4%	
India 10Y	6.9%			
India 2Y	6.1%			
India 1Y	5.8%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,642	-0.9%	11.6%	33.1
Dow Jones	52,762	-1.3%	9.8%	25.5
Nasdaq 100	29,213	-0.7%	15.7%	48.0
FTSE 100	10,748	0.0%	8.2%	17.0
CAC 40	8,453	-0.6%	3.7%	24.8
DAX	25,983	-0.4%	6.1%	27.1
Nikkei 225	65,543	-1.1%	30.4%	35.0
Hang Seng	25,698	0.8%	0.3%	12.5
Shanghai Comp	3,904	0.2%	-1.6%	17.7
KOSPI	6,775	-1.1%	60.9%	33.5
S&P/ASX 200	9,065	-0.2%	4.0%	23.9

Stocks in the News

LOHIA CORP LTD (CMP: 540, MARKET CAP: 5704 Cr., SECTOR: CAPITAL GOODS)

Q1FY27 consolidated net profit surged 292% YoY to ₹66.3 crore (from ₹16.9 crore); revenue rose 60% to ₹503 crore, aided by higher exports and a record order book exceeding ₹1,780 crore. PBT rose 289% to ₹91.3 crore despite higher raw-material and employee costs. Business Standard

CEIGALL INDIA LTD (CMP: 313, MARKET CAP: 5441 Cr., SECTOR: CONSTRUCTION)

JV secured four road orders worth ₹2,149.62 crore in Arunachal Pradesh from MoRTH, lifting the disclosed order book to ₹16,120 crore. Separately approved a ₹29.44 crore equity investment for the Indore-Ujjain Greenfield Highway project (74% stake). ScanX

INDIQUBE SPACES LTD (CMP: 189, MARKET CAP: 4029 Cr., SECTOR: SERVICES)

Q1FY27 PAT rose 91% to ₹35 crore on record revenue of ₹428 crore, driven by 90% steady-state occupancy. Secured a ₹68 crore managed-workspace deal with a global audio platform for 1,300 seats in Bengaluru — its first disclosed 5-10 year win. ScanX

STRIDES PHARMA SCIENCE LTD (CMP: 993, MARKET CAP: 9158 Cr., SECTOR: PHARMACEUTICALS)

Received a USFDA Establishment Inspection Report for its Bengaluru facility with Voluntary Action Indicated (VAI) status, confirming formal closure of the inspection. Shareholders separately approved all AGM resolutions including FY26 financials and board appointments. ScanX

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	29,302	0.4%	4.0%	24.1
Nifty IT	30,673	0.8%	-19.0%	23.9
Nifty Fin Ser	26,204	0.7%	-5.1%	17.1
Nifty Pharma	26,416	0.4%	16.3%	43.4
Nifty Services	30,890	0.7%	-8.2%	34.0
Nifty Cons Dur	40,505	0.6%	10.2%	54.9
Nifty PSE	9,743	-0.1%	-1.1%	10.2
Nifty FMCG	47,863	0.8%	-13.7%	33.0
Nifty Pvt Bank	27,449	0.9%	-4.4%	10.3
Nifty PSU Bank	8,617	0.0%	1.0%	14.1
Nifty Cons	12,068	0.7%	-1.8%	42.6
Nifty Energy	38,152	0.1%	8.0%	12.1
Nifty Health	16,465	0.3%	12.5%	39.4
Nifty India Mfg	16,512	0.2%	7.1%	30.7
Nifty Metal	13,060	0.3%	17.0%	23.4
Nifty Oil & Gas	11,178	0.0%	-8.6%	17.1

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
PNBHOUSING	10.5	0.3
SAIL	7.9	1.7
JINDALSTEL	6.3	0.6
AMBER	5.7	0.2
PAYTM	5.1	1.3
Short		
GODFRYPHLP	18.8	-0.9
CAMS	9.0	-0.5
RECLTD	6.6	-2.5
KEI	6.4	-0.2
PFC	5.4	-2.3
Long Unwinding		
DMART	-12.6	-0.3
ASTRAL	-12.4	-0.2
PIIND	-11.5	-0.5
SONACOMS	-10.5	-0.1
NESTLEIND	-4.2	-0.2
Short Covering		
WAAREEENER	-21.3	0.6
LODHA	-19.9	2.5
IREDA	-16.6	1.1
SWIGGY	-16.2	2.7
MAZDOCK	-15.2	0.9

GRAVITA INDIA LTD (CMP: 1793, MARKET CAP: 13233 Cr., SECTOR: METALS & MINING)

Plans to add 59,200 MTPA of copper recycling capacity at its Mundra facility with an investment of approximately ₹64 crore. Management held institutional investor meetings on 17-18 August to present its growth strategy. ScanX

Commodities	CMP	1D	YTD
Gold ($)	4,520	0.0%	4.4%
Silver ($)	68.1	0.1%	-5.9%

Currency	CMP	1D	YTD
USD/INR	95.7	-0.1%	6.4%
EUR/INR	112.0	0.1%	6.0%
GBP/INR	130.6	0.1%	7.9%
JPY/INR	0.6	0.1%	5.0%
EUR/USD	1.2	0.1%	-0.5%

Securities Lending & Borrowing Scheme (SLBS)

Company	Under.Ltp	Fut.Ltp	Spread (%)
LTM	4,553.00	4,462.30	1.99
BRITANNIA	5,548.00	5,497.50	0.91
JSWSTEEL	1,299.70	1,287.90	0.91
MFSL	1,575.00	1,562.00	0.83
HDFCAMC	2,624.00	2,603.00	0.80

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
LENSKART	657	658	645	19-Aug-26
NAM-INDIA	1,233	1,266	1,234	2-Jul-26
RBLBANK	392	394	393	5-Aug-26
WELCORP	2,009	2,018	1,984	19-Aug-26
SAILIFE	1,468	1,484	1,475	13-Aug-26

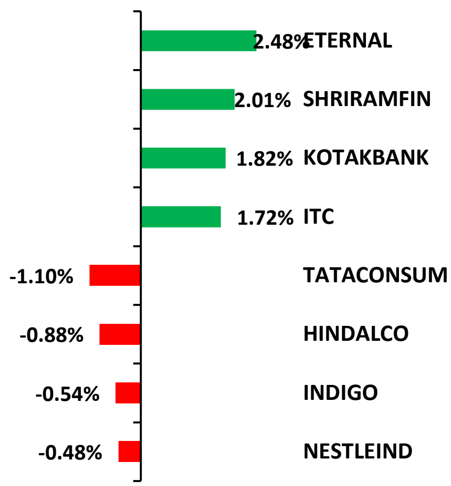
52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
ITC	272	265	266	19-Aug-26
IRCTC	487	485	485	28-Jul-26
PGHH	8,243	8,220	8,235	19-Aug-26
SUNTV	476	474	476	12-Aug-26
KEC	425	418	422	19-Aug-26

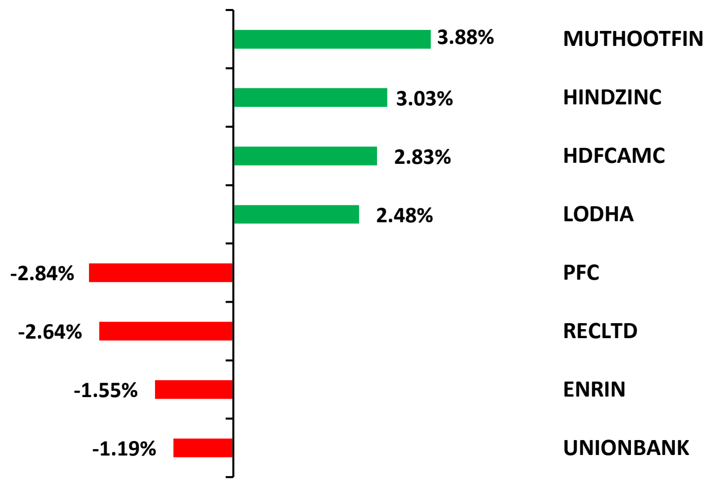
Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
MANGLMCEM	2,731	22	32	991
PACIFICI	8	0	0	153
WHBRADY	0	0	0	490
MPDL	9	0	0	34
BANARISUG	71	1	1	4,143
KRYSTAL	688	17	41	680
MMTC	42,449	1,081	1,275	66
NIFTYAXIS	386	10	49	268
SOLARA	6,916	186	162	632
INDOBORAX	6,100	180	326	498
BALRAMCHIN	33,515	988	821	778
CGVAK	13	0	0	155
SOMICONVEY	687	25	22	101
ARYAMAN	0	0	0	585
UNIONGOLD	83	3	9	153
STAR	4,949	201	237	995
ISTLTD	3	0	0	676
LOWVOL	25	1	4	209
KFINTECH	17,318	993	725	961
KRONOX	5,889	347	262	186
SAMBANDAM	9	1	1	126
TECILCHEM	306	19	38	9
AMAL	37	2	2	798
NETWORK18	45,467	2,928	2,463	31
VERANDA	9,972	716	489	257

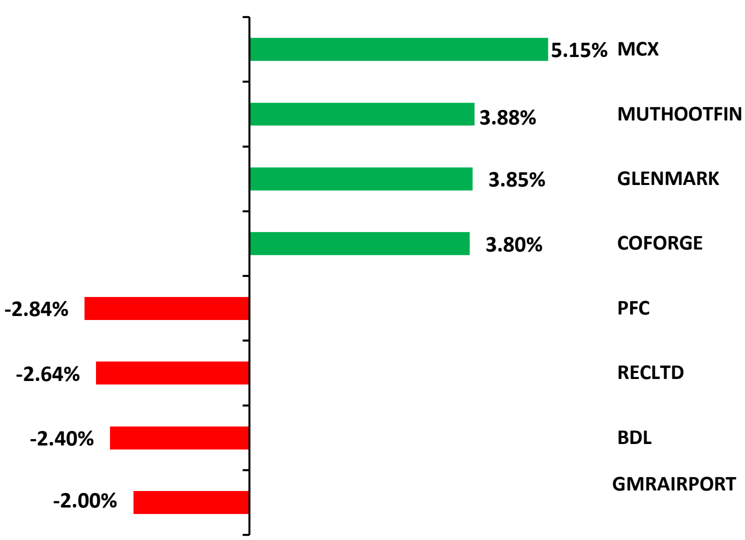
Nifty 50



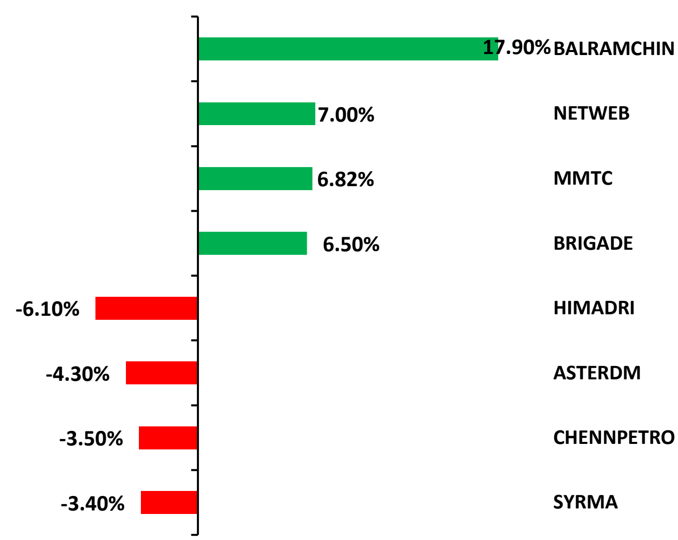
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AARTECH	Kabra Kailash	BUY	1	50.2
AARTECH	Kabra Kailash	SELL	237	49.6
ABINFRA	Arihant Capital Markets Limited	SELL	5809	13.7
ABINFRA	Arihant Capital Markets Limited	BUY	6849	13.7
AMRUTANJAN	Envision India Fund	SELL	213	523.6
ASIANTILES	Thakkar Nileshkumar Farshuram Huf	BUY	2007	45.4
ATALREAL	Altizen Ventures Llp	BUY	698	33.3
ATALREAL	Altizen Ventures Llp	SELL	698	33.5
AVADHSUGAR	Hrti Private Limited	SELL	99	798.8
AVADHSUGAR	Hrti Private Limited	BUY	106	798.4
AVADHSUGAR	Qe Securities Llp	BUY	99	795.3
AVADHSUGAR	Qe Securities Llp	SELL	101	792.4
BALRAMCHIN	Graviton Research Capital Llp	SELL	1075	712.1
BALRAMCHIN	Graviton Research Capital Llp	BUY	1075	709.6
BALRAMCHIN	Hrti Private Limited	SELL	1282	737.4
BALRAMCHIN	Hrti Private Limited	BUY	1335	724.2
BALRAMCHIN	Junomoneta Finsol Private Limited	BUY	1083	735.9
BALRAMCHIN	Junomoneta Finsol Private Limited	SELL	1090	737.0
BALRAMCHIN	Microcurves Trading Private Limited	SELL	1304	740.9
BALRAMCHIN	Microcurves Trading Private Limited	BUY	1304	740.4
BLBLIMITED	Acn Financial Services Ltd	SELL	281	16.1
BLEL	Dipan Mehta Commodities Private Limited	BUY	253	534.2
BLEL	Dipan Mehta Commodities Private Limited	SELL	253	534.5
BLEL	Elixir Wealth Management Private Limited	BUY	453	532.0
BLEL	Elixir Wealth Management Private Limited	SELL	459	532.6
BLEL	Goldmine Stocks Private Limited	SELL	392	532.5
BLEL	Goldmine Stocks Private Limited	BUY	392	531.7
BLEL	Irage Broking Services Llp	BUY	625	533.1
BLEL	Irage Broking Services Llp	SELL	635	532.5
BLEL	Jump Trading Financial India Private Limited	BUY	288	531.0
BLEL	Jump Trading Financial India Private Limited	SELL	289	531.5
BLEL	Junomoneta Finsol Private Limited	BUY	419	532.5
BLEL	Junomoneta Finsol Private Limited	SELL	425	533.1
BLEL	Marwadi Chandarana Intermediaries Brokers Private Limited	BUY	447	519.2
BLEL	Marwadi Chandarana Intermediaries Brokers Private Limited	SELL	447	525.3
BLEL	Mathisys Quantcap Llp	SELL	332	534.2
BLEL	Mathisys Quantcap Llp	BUY	332	534.4
BLEL	Microcurves Trading Private Limited	BUY	1206	531.5
BLEL	Microcurves Trading Private Limited	SELL	1206	531.8
BLEL	Nk Securities Research Private Limited	SELL	587	531.8
BLEL	Nk Securities Research Private Limited	BUY	587	531.6
BLEL	Plutus Research Private Limited	SELL	614	529.4
BLEL	Plutus Research Private Limited	BUY	617	529.1
BLEL	Pure Broking Private Limited	BUY	316	532.0

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
BLEL	Pure Broking Private Limited	SELL	317	532.7
BLEL	Silver Line Ventures Private Limited	SELL	161	527.6
BLEL	Silver Line Ventures Private Limited	BUY	216	523.4
CALSOFT	Shri Mukta Shares	BUY	206	27.3
CALSOFT	Shri Mukta Shares	SELL	207	27.1
CREDENT	Motilal Oswal Financial Services Limited	BUY	298	374.0
CREDENT	Om Trading	BUY	100	359.1
DHAMPURSUG	Qe Securities Llp	BUY	340	187.2
DHAMPURSUG	Qe Securities Llp	SELL	342	187.8
DWARKESH	Alphagrep Securities Private Limited	SELL	989	53.6
DWARKESH	Alphagrep Securities Private Limited	BUY	989	53.5
DWARKESH	Junomoneta Finsol Private Limited	BUY	2428	54.1
DWARKESH	Junomoneta Finsol Private Limited	SELL	2442	54.1
DWARKESH	Nk Securities Research Private Limited	SELL	1245	54.5
DWARKESH	Nk Securities Research Private Limited	BUY	1245	54.5
DWARKESH	Qe Securities Llp	BUY	1537	53.3
DWARKESH	Qe Securities Llp	SELL	1554	53.5
GATECH	L7 Hitech Private Limited	BUY	818	0.9
GATECH	L7 Hitech Private Limited	SELL	12389	0.9
GATECH	Parijata Trading Private Limited	SELL	8000	0.9
GSMFOILS	Anand Mohan	BUY	75	80.2
GSMFOILS	Epitome Trading And Investments	SELL	87	86.2
GSMFOILS	Epitome Trading And Investments	BUY	87	79.9
GSMFOILS	Hi Growth Corporate Services Pvt Ltd	SELL	76	82.6
GSMFOILS	Hi Growth Corporate Services Pvt Ltd	BUY	76	80.8
GSMFOILS	Imran Khan	SELL	424	80.2
GSMFOILS	Jeniva Antony Ephrem	SELL	1	86.0
GSMFOILS	Jeniva Antony Ephrem	BUY	200	79.7
GSMFOILS	Jowin Wilson	SELL	84	84.3
GSMFOILS	Jowin Wilson	BUY	88	83.6
GSMFOILS	Kenil Jaysukhbhai Thathagar	BUY	83	86.3
GSMFOILS	Lakhtariya Shivam	BUY	75	87.9
GSMFOILS	Matalia Stock Broking Private Limited	SELL	71	84.2
GSMFOILS	Matalia Stock Broking Private Limited	BUY	72	83.7
GSMFOILS	Mezzanine Equity Private Limited	BUY	299	85.6
GSMFOILS	Multiplier Share & Stock Advisors Private Limited	SELL	448	86.5
GSMFOILS	Multiplier Share & Stock Advisors Private Limited	BUY	578	80.2
GSMFOILS	Prijal Tradefin Llp	BUY	82	79.9
GSMFOILS	Prijal Tradefin Llp	SELL	82	79.9
GSMFOILS	Smart Horizon Opportunity Fund	SELL	335	86.4
GSMFOILS	Soham Fincare India Llp	SELL	99	84.1
GSMFOILS	Soham Fincare India Llp	BUY	99	83.2
GSMFOILS	Vijaya Sharma	SELL	149	84.0
INDOBORAX	Hrti Private Limited	SELL	216	481.4
INDOBORAX	Hrti Private Limited	BUY	257	479.7

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
INDOBORAX	Junomoneta Finsol Private Limited	SELL	313	487.0
INDOBORAX	Junomoneta Finsol Private Limited	BUY	318	486.1
INDOBORAX	Microcurves Trading Private Limited	SELL	301	493.5
INDOBORAX	Microcurves Trading Private Limited	BUY	301	492.7
INDOBORAX	Nk Securities Research Private Limited	SELL	189	489.6
INDOBORAX	Nk Securities Research Private Limited	BUY	189	489.3
KFINTECH	Edelweiss Mutual Fund	BUY	1081	925.0
KFINTECH	General Atlantic Singapore Fund Pte Ltd	SELL	15135	925.0
KFINTECH	Hsbc Mutual Fund	BUY	1784	925.0
KFINTECH	Invesco Mutual Fund	BUY	4324	925.0
KFINTECH	Kotak Mahindra Mutual Fund	BUY	2000	925.0
KFINTECH	Mirae Asset Mutual Fund	BUY	2562	925.0
KFINTECH	Motilal Oswal Mutual Fund	BUY	984	925.0
KIRIINDUS	Microcurves Trading Private Limited	BUY	335	469.3
KIRIINDUS	Microcurves Trading Private Limited	SELL	335	469.5
KRONOX	Nk Securities Research Private Limited	BUY	196	177.3
KRONOX	Nk Securities Research Private Limited	SELL	197	177.4
KRYSTAL	Jagid Vanitaben Rajendraprasad	BUY	149	633.3
KRYSTAL	Jagid Vanitaben Rajendraprasad	SELL	151	626.5
KRYSTAL	Radiant Computech Private Limited	BUY	116	683.8
MAHICKRA	Orenda Enterprises Llp	BUY	125	258.4
MAHICKRA	Sagar Pravinchandra Khakhara	SELL	125	258.4
MARSONS	Psl Limited	BUY	1000	109.8
MOREPENLAB	Hrti Private Limited	BUY	3006	93.4
MOREPENLAB	Hrti Private Limited	SELL	3105	93.7
MOREPENLAB	Qe Securities Llp	BUY	2935	93.9
MOREPENLAB	Qe Securities Llp	SELL	2965	93.4
MYSORPETRO	Arham Share Private Limited	BUY	28	165.4
MYSORPETRO	Arham Share Private Limited	SELL	38	164.0
NXT-INFRA	Actis Highway Infra Limited	SELL	19125	93.9
NXT-INFRA	Kotak Mahindra Bank Limited	BUY	9550	93.9
NXT-INFRA	Larsen & Toubro Limited	BUY	9575	93.9
PONNIERODE	Yachna Bhatia	BUY	55	414.4
PROPSHOP	Nova Global Opportunities Fund Pcc - Touchstone	SELL	230	69.5
PROPSHOP	Premium Priority Zone Llp	BUY	150	69.5
RATNAVEER	Arihant Capital Markets Limited	SELL	2080	264.6
RATNAVEER	Arihant Capital Markets Limited	BUY	2171	263.6
RATNAVEER	Hrti Private Limited	SELL	457	262.7
RATNAVEER	Hrti Private Limited	BUY	553	264.0
RATNAVEER	Junomoneta Finsol Private Limited	SELL	473	263.9
RATNAVEER	Junomoneta Finsol Private Limited	BUY	509	263.9
RATNAVEER	Qe Securities Llp	BUY	738	263.3
RATNAVEER	Qe Securities Llp	SELL	743	262.8
SANGINITA	Guttikonda Rajasekhar	SELL	840	62.0
SANGINITA	Guttikonda Vara Lakshmi	SELL	850	60.2
SANGINITA	Guttikonda Vara Lakshmi	SELL	1117	62.7
SANGINITA	Neo Apex Share Broking Services Llp	BUY	380	60.9
SBC	Deepika Gupta	BUY	2617	39.7

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SHANTIGOLD	Hrti Private Limited	BUY	96	248.1
SHANTIGOLD	Hrti Private Limited	SELL	449	248.7
SHIPROCKET	Microcurves Trading Private Limited	BUY	4025	149.7
SHIPROCKET	Microcurves Trading Private Limited	SELL	4025	149.7
SHIPROCKET	Nk Securities Research Private Limited	SELL	4235	150.4
SHIPROCKET	Nk Securities Research Private Limited	BUY	4235	150.3
SIRCA	Acme Capital Market Limited	BUY	305	443.4
SIRCA	Acme Capital Market Limited	SELL	305	444.9
SOLARA	Junomoneta Finsol Private Limited	SELL	283	626.8
SOLARA	Junomoneta Finsol Private Limited	BUY	283	626.2
SUMEETINDS	Ankita Vishal Shah	SELL	367	13.0
SUMEETINDS	Ankita Vishal Shah	BUY	5422	13.3
SUN-RE	Asnani Stock Broker Private Limited - Error Account	SELL	40	2.1
SUN-RE	Prakash Gourisankar Jhunjhunwala	SELL	48	2.1
SUN-RE	Rashi Enterprises	BUY	101	2.1
TECHNOCRAF	Junomoneta Finsol Private Limited	BUY	277	327.9
TECHNOCRAF	Junomoneta Finsol Private Limited	SELL	283	328.0
TECHNOCRAF	Qe Securities Llp	BUY	209	326.7
TECHNOCRAF	Qe Securities Llp	SELL	209	325.7
TFCILTD	Hrti Private Limited	BUY	1022	131.8
TFCILTD	Hrti Private Limited	SELL	2486	131.4
TIJARIA	Gyaniram Patle	SELL	146	5.9
WELINV	Lloyds Enterprises Limited	BUY	22	1,851.0
ZAGGLE	Hrti Private Limited	SELL	1264	193.5
ZAGGLE	Hrti Private Limited	BUY	1292	194.0
ZAGGLE	Junomoneta Finsol Private Limited	BUY	978	193.6
ZAGGLE	Junomoneta Finsol Private Limited	SELL	979	193.6
ZAGGLE	Microcurves Trading Private Limited	SELL	1035	194.3
ZAGGLE	Microcurves Trading Private Limited	BUY	1035	194.2
ZAGGLE	Qe Securities Llp	BUY	1742	194.1
ZAGGLE	Qe Securities Llp	SELL	1747	193.2

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
KFINTECH	BANDHAN MUTUAL FUND	BUY	519	925.0
KFINTECH	CITIGROUP GLOBAL MARKETS SINGAPORE PTE LIMITED	BUY	270	925.0
KFINTECH	EDELWEISS MUTUAL FUND	BUY	1081	925.0
KFINTECH	GENERAL ATLANTIC SINGAPORE FUND PTE LTD	SELL	15135	925.0
KFINTECH	HSBC MUTUAL FUND	BUY	1784	925.0
KFINTECH	ICICI LOMBARD GENERAL INSURANCE CO LTD	BUY	281	925.0
KFINTECH	ICICI PRUDENTIAL LIFE INSURANCE COMPANY LIMITED	BUY	541	925.0
KFINTECH	INVESCO MUTUAL FUND	BUY	4324	925.0
KFINTECH	KOTAK MAHINDRA MUTUAL FUND	BUY	2000	925.0
KFINTECH	MIRAE ASSET MUTUAL FUND	BUY	2562	925.0
KFINTECH	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	270	925.0
KFINTECH	MOTILAL OSWAL MUTUAL FUND	BUY	984	925.0
KFINTECH	SOCIETE GENERALE	BUY	519	925.0
NXT-INFRA	ACTIS HIGHWAY INFRA LIMITED	SELL	19125	93.9
NXT-INFRA	KOTAK MAHINDRA BANK LIMITED	BUY	9550	93.9
NXT-INFRA	LARSEN & TOUBRO LIMITED	BUY	9575	93.9

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

Company	Purpose
DEE Development Engineers Limited	Dividend/Other business matters
Emkay Global Financial Services Limited	Fund Raising
The Federal Bank Limited	Fund Raising
Flexituff Ventures International Limited	Financial Results
GLOBE ENTERPRISES (INDIA) LIMITED	Other business matters
ICICI Bank Limited	Fund Raising
Innova Captab Limited	Financial Results

Nifty & Bank Spot – Pivot Levels 21/08/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24231.85	24188	24145	24107	24269	24307	24350
Bank Nifty	57495.90	57383	57271	57112	57654	57813	57925

Heritage Foods Ltd – Technical Stock Call – 21/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
HERITGFOOD	BUY	378.75	492	(367-359)-353-(347-338)	328

Sector: FMCG

About: **Heritage Foods Limited** is one of India's leading dairy and value-added food companies, primarily engaged in the procurement, processing, and marketing of milk and dairy products. Founded in 1992, the company has built a strong presence across South India and is expanding its footprint into other regions through its extensive farmer network and distribution channels.

View – Short Term Bullish

The stock commenced its up move from 292.55 (MAR 26). Stock started trading above the averages & gradually reached a high of 381.20 (MAY 26).

Later, Down Gaps were followed & the stock forming lower lows reached a low of 311.60 (JUN 26).

As observed on the charts, the stock traded into a consolidation zone during the period JUN 26_JUL 26. However, the stock has took support on the trendline & reached a high of 368 (AUG 26).

Buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Symmetrical Triangle Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 381 (AUG 26), which is higher than the previous swing highs.

Indicators like Stoch RSI, MACD & Aroon suggests positive crossover.

Target of **492** is expected with lower support levels at **(367-359)-353-(347-338)** in case of intermediate fall.

A stop loss at **328** is to be followed for the trade.

Global Macro Events (21st August 2026)		
Event	**Previous**	**Forecasted**
India		
HSBC Composite PMI Flash AUG	54.3	55.5
HSBC Manufacturing PMI Flash AUG	53.5	54.3
HSBC Services PMI Flash AUG	53.3	54
Bank Loan Growth YoY AUG/07	19.30%	
Deposit Growth YoY AUG/07	15.40%	
Foreign Exchange Reserves AUG/14	$707B	
USA		
Fed Balance Sheet AUG/19	$6.760T	
S&P Global Composite PMI Flash AUG	54.5	53.2
S&P Global Manufacturing PMI Flash AUG	53.90	53.5
S&P Global Services PMI Flash AUG	54.6	53.8
Baker Hughes Oil Rig Count AUG/21	455	
Baker Hughes Total Rigs Count AUG/21	593	
China		
FDI (YTD) YoY JUL	-5%	-6.00%
Great Britain		
GfK Consumer Confidence AUG	-17	-18
Retail Sales MoM JUL	1%	-0.40%
Retail Sales YoY JUL	4.20%	3.70%
Public Sector Net Borrowing Ex Banks JUL	£-16B	£-0.6B
Retail Sales ex Fuel MoM JUL	1.10%	-0.90%
Retail Sales ex Fuel YoY JUL	5.40%	4.70%
S&P Global Manufacturing PMI Flash AUG	51.9	51.8
S&P Global Services PMI Flash AUG	52.1	52
S&P Global Composite PMI Flash AUG	52.2	52.1
Germany		
S&P Global Manufacturing PMI Flash AUG	52.20	52
S&P Global Composite PMI Flash AUG	51.3	51.4
S&P Global Services PMI Flash AUG	49.8	50.5

SECTION 1: STOCK SPECIFIC NEWS

EMS

Emerged as L-1 bidder for a ₹190.86 crore water treatment plant project from the Rajasthan government, extending its infrastructure order pipeline. Stock rose 5.11%.
ScanX

Susan Electricals

Q1FY27 net profit surged to ₹639 lakh, reversing a prior-year loss, as revenue jumped 279% YoY with operating margin improving to 11.90%. Co-Chairman targets a 60% capacity expansion to 12,000 km per annum by February 2027, backed by a ₹142 crore order book.
ScanX

Autoline Industries

Received a ₹110 crore mobilisation order from Tata Motors for hatchback components (₹80 crore annual incremental revenue), though the stock fell 4.13% as investors flagged tight liquidity — current ratio of 0.79x and negative FY25 free cash flow of ₹89 crore.
ScanX

GP Petroleums

Signed an exclusivity pact with Incubit DMCC for "Project Petroleum," a potential strategic acquisition spanning assets in India, UAE and Africa. Board also recommended a ₹0.50/share final FY26 dividend, subject to AGM approval on 26 August. Stock rose 3.69%.
ScanX

Ramco Systems

Selected by Royal Jordanian Airlines as technology partner for its future growth phase, expanding global aviation footprint. Subsidiary Ramco Systems Corporation was separately selected by Pem-Air for aviation software solutions. Stock fell 2.14%.
ScanX

Fabtech Technologies

A unit secured a turnkey flavor-manufacturing project in the UAE valued at AED 9.92 million (₹25 crore), to be completed within six months. Separately won a ₹24.6 crore confirmed order from Aroma King, though book-to-bill remains low at 0.28x.
ScanX

Tembo Global Industries
Confirmed ₹1,600 crore FY27 revenue guidance and added fresh FY28 defense-segment guidance, signalling expanding visibility in its industrial and defence order pipeline.
ScanX

Ashapura Minechem
Held its Q1FY27 earnings call, guiding to EBITDA per tonne of $5.5-6 in the near term with an aspiration to reach $10/tonne over the longer term.
ScanX

EID Parry
Q1FY27 results showed sugar-segment revenue up 18% to ₹410 crore, even as the Consumer Products Group (CPG) segment revenue fell 18%, reflecting a mixed performance across its two core businesses.
ScanX

SECTION 2: CORPORATE ANNOUNCEMENTS

Tempsens Instruments (India) / Anchor Investor Allocation
Filed confirmation via BSE circular of allotment of 64.84 lakh equity shares to anchor investors at ₹300/share, aggregating ₹194.55 crore, ahead of the IPO's public subscription opening.
Outlook Business

Blue Blends (India) / Promoter Stake Acquisition via NCLT Resolution
Promoters acquired a 94.87% stake in the company through an NCLT-approved resolution plan, marking a significant ownership restructuring completed via the insolvency-resolution route.
ScanX

Sayaji Hotels / Promoter-Linked Stake Sale
Century 21 sold a 0.57% stake in the company via open-market transaction, a disclosed promoter-group-linked divestment under bulk/block deal reporting norms.
ScanX

Neogen Chemicals / Institutional Holding Change
SBI Mutual Fund reduced its stake in the company to 6.028%, a disclosed shareholding-pattern change reportable under SEBI's substantial-acquisition norms.
ScanX

Vipul Organics / New Facility Commissioning
Announced commencement of production at its new manufacturing facility in Sayakha, Gujarat, expanding installed capacity for its specialty-chemicals business.
ScanX

Max India / AGM Outcome
Held its 7th AGM, adopting FY26 financial statements and re-appointing Rajit Mehta to the board, per the disclosed meeting outcome.
ScanX

KMCH (Kovai Medical Center and Hospital) / Management Redesignation
Sought shareholder approval to redesignate Dr. Arun N Palaniswami, a board-level governance change disclosed ahead of the relevant approval meeting.
ScanX

SECTION 3: MACRO / NON-STOCK NEWS

Sensex Snaps Four-Day Losing Streak, Jumps 628 Points
The Sensex and Nifty50 reversed their declining trend on Thursday, with the Sensex closing near 77,538 and the Nifty50 ending at 24,232, supported by IT, realty and private bank shares tracking a recovery in global markets.
Business Standard

GIFT Nifty Signals Strong Positive Open
GIFT Nifty opened with a gain of 110.5 points at 24,200.50 versus the prior close of 24,090, indicating a firm start after the previous session's close of 76,909.68 (Sensex) and 24,078.30 (Nifty).
India TV News

Asian Equities Advance on US Treasury Buyback Reports
Asian markets rose after Wall Street edged higher amid reports the US is considering buybacks of longer-term Treasury securities to ease borrowing costs; Japan's Nikkei 225 gained 493.58 points (0.76%) to 65,820.
India TV News

Nikkei Extends Gains to 66,162, Up 1.28% in Later Trade
By later in the session, Japan's Nikkei 225 had advanced further to 66,162.39 (+1.28%), while South Korea's KOSPI surged 5.65% to 6,836.74, reflecting an exceptionally strong regional risk-on move.
ScanX

Hang Seng, FTSE Also Firm; Wall Street Futures Higher
Hong Kong's Hang Seng rose 1.16% to 25,790, the FTSE gained 0.14% to 10,743.35, and US futures pointed higher with the S&P 500 at 7,708.03 (+0.21%), Nasdaq at 26,333.33 (+0.17%) and Dow at 53,463.05 (+0.22%).
ScanX

BSE Midcap Index Gains in Early Trade
The BSE Midcap Select Index was up 129.54 points in the early session, tracking the broader indices' recovery from the prior four-day losing streak.
India TV News

Nifty Media Index Rises 2.13% in Mid-Session Trade
Sector-specific strength emerged during the session, with the Nifty Media index up 2.13% as broader market breadth improved through the day.
ICICI Direct

Infrastructure and Capex-Linked Stocks Lead Sentiment
Order books swelled across infrastructure and commercial real estate through the session, with Ceigall India and EMS leading gains on fresh government contract wins, underscoring continued capex-cycle momentum.
ScanX

RBI Minutes and FOMC Minutes in Focus
Markets tracked the release of the RBI's latest monetary policy committee minutes on 20 August, alongside anticipation of the US Federal Reserve's FOMC minutes due the same day, for cues on the forward rate path in both economies.
Business Standard

US-Iran Tensions and Brent Crude Remain Key Overhangs

Elevated Brent crude prices and unresolved US-Iran tensions continued to feature as the primary risk factors investors tracked alongside the day's recovery in Indian equities.

Business Standard

US Treasury Signals Larger Long-Term Debt Purchases

The US Treasury Department said it would increase long-term debt purchases, helping push Treasury yields lower and supporting risk assets globally ahead of the Fed minutes release.

Charles Schwab

Bessent: US Unlikely to Restart Large-Scale Iran Combat

Treasury Secretary Scott Bessent said the US likely won't restart large-scale combat operations against Iran even as it steps up economic pressure, a de-escalatory signal that supported the day's global risk-on tone.

CNBC

Q1FY27 Earnings Season Nears Completion

4,468 of 5,142 tracked companies had reported Q1FY27 results as of 19 August, with aggregate revenue growth of 20.86% YoY and net profit growth of 10.09% YoY across the reporting universe.

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