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Daily Updates

Market Commentary

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Overnight global action:

On 24th August 2026, US markets delivered a mixed performance with S&P 500 declining by 21.41 pts (-0.28%), Dow Jones gaining by 140.15 pts (+0.26%) and Nasdaq 100 declining by -285.68 pts (-0.98%). Gift Nifty declined by 67 pts (-0.28%), indicating for Indian markets a mild negetiv start.

Advance-Decline ratio on NSE stood at 1,428:1,352, indicating positive breadth, while BSE breadth remained negative at 2,041 advances versus 2,393 declines, reflecting mixed market participation across the two exchanges.

Index Options Data Analysis:

Nifty OI peaks at 24,300 Calls and 24,000 Puts. PCR stands at 0.69.
Sensex OI peaks at 77,500 Calls and 75,500 Puts. PCR stands at 0.78.
Bank Nifty OI peaks at 58,000 Calls and 57,000 Puts. PCR stands at 0.63.

Securities in Ban for F&O Trade:

-

Sector Performance:

NIFTY MICROCAP 250 index grew by 0.25 % driven by RATNAMANI(+14.6%), BALUFORGE(+13.3%) and TVSSCS(+9.9%).

NIFTY MID SELECT index grew by 0.15 % driven by HINDPETRO(+2.4%), BSE(+2.2%) and INDUSINDBK(+1.3%).

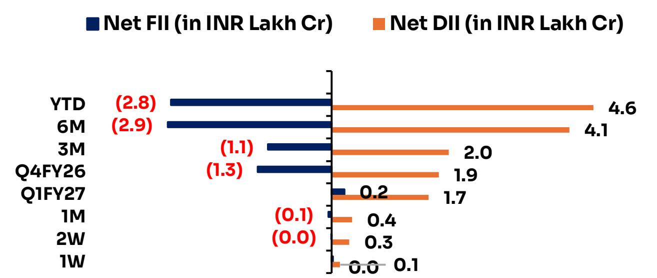
NIFTY MIDCAP 100 index grew by 0.13 % driven by VMM(+9.7%), SAIL(+3.6%) and GLENMARK(+3.1%).

NIFTY SMLCAP 50 index declined by -0.35 % driven by AEGISLOG(-5.5%), FIVESTAR(-4.0%) and POONAWALLA(-2.9%).

NIFTY SMLCAP 100 index declined by -0.26 % driven by BLS(-10.7%), AEGISLOG(-5.5%) and FIVESTAR(-4.0%).

NIFTY SMLCAP 250 index declined by -0.21 % driven by BLS(-10.7%), BALRAMCHIN(-6.4%) and AEGISLOG(-5.5%).

Fund Flow 24th Aug	Buy	Sell	Net
FII/FPI	12,333	11,151	1,182
DII	15,337	12,844	2,493



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	24,144	-0.3%	-8.1%	21.9
Sensex 30	77,369	-0.2%	-9.2%	20.2
Nifty 50	24,219	-0.1%	-7.3%	22.0
India VIX	12	2.7%	21.4%	
Nifty Bank	57,526	-0.4%	-3.5%	16.9
Nifty Next 50	74,022	0.0%	6.7%	74.0
Nifty 500	23,512	-0.1%	-1.5%	22.1
Nifty Mid 100	63,817	0.1%	5.5%	32.8
Nifty Small 250	18,375	-0.2%	10.1%	30.9
USD/INR	95.7	0.0%	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	7,653	-0.3%	11.8%	33.1
Dow Jones	53,417	0.3%	11.1%	25.8
Nasdaq 100	29,023	-1.0%	14.9%	47.7
FTSE 100	10,854	0.4%	9.3%	17.1
CAC 40	8,453	-0.4%	3.7%	24.8
DAX	26,107	-0.1%	6.6%	27.2
Nikkei 225	64,965	-0.9%	29.2%	34.7
Hang Seng	25,517	-1.9%	-0.4%	12.4
Shanghai Comp	3,882	-0.6%	-2.2%	17.6
KOSPI	6,488	-3.1%	53.4%	32.1
S&P/ASX 200	9,129	0.3%	4.6%	24.1

Stocks in the News

AUROBINDO PHARMA (CMP: 1608, MARKET CAP: 92521 Cr., SECTOR: PHARMACEUTICALS)

NSE filing

USFDA completed a routine inspection of Aurobindo Pharma's recently acquired Lannett Company facility in Seymour, Indiana, with four observations. The company stated that all observations are procedural in nature and it will respond within the stipulated timeline.

GARDEN REACH SHIPBUILDERS & ENGINEERS (GRSE) (CMP: 2596, MARKET CAP: 29739 Cr., SECTOR: DEFENCE / SHIPBUILDING)

NSE filing

GRSE plans a significant ₹2,670 crore capacity expansion across its Raichak, Timber Pond–Shalimar and Damodar–Khidderpore facilities. The investment will expand indigenous shipbuilding capacity and enable execution of larger and more complex vessels.

PIRAMAL FINANCE (CMP: 2184, MARKET CAP: 49509 Cr., SECTOR: NBFC / FINANCIAL SERVICES)

NSE filing

The board has approved a preferential issue of warrants worth ₹1,750.03 crore to a promoter-group entity. The capital infusion strengthens the lender's capital position and provides additional funding capacity for future growth.

INDIAN HOTELS COMPANY (IHCL) (CMP: 729, MARKET CAP: 103754 Cr., SECTOR: HOTELS / HOSPITALITY)

NSE filing

IHCL has announced a scheme of arrangement for the merger of Oriental Hotels with Indian Hotels Company. The transaction will consolidate Oriental Hotels' properties under IHCL and strengthen its hospitality portfolio and operating platform.

Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	29,101	-0.1%	3.2%	24.0
Nifty IT	30,597	0.2%	-19.2%	23.9
Nifty Fin Ser	26,159	-0.4%	-5.3%	17.1
Nifty Pharma	26,339	-0.1%	15.9%	43.3
Nifty Services	30,858	-0.3%	-8.3%	33.9
Nifty Cons Dur	40,453	-0.3%	10.1%	54.8
Nifty PSE	9,782	-0.1%	-0.7%	10.3
Nifty FMCG	47,528	0.0%	-14.3%	32.7
Nifty Pvt Bank	27,502	-0.3%	-4.3%	10.3
Nifty PSU Bank	8,540	-0.9%	0.1%	14.0
Nifty Cons	12,010	-0.1%	-2.3%	42.4
Nifty Energy	38,336	0.2%	8.5%	12.2
Nifty Health	16,418	0.0%	12.2%	39.3
Nifty India Mfg	16,510	0.2%	7.1%	30.7
Nifty Metal	13,381	1.6%	19.8%	24.0
Nifty Oil & Gas	11,197	0.1%	-8.5%	17.1

Derivatives Position (Combined#)

Stock	% Chg OI	%Chg LTP
Long		
IREDA	12.3	0.6
GVT&D	5.9	0.4
SIEMENS	4.2	4.8
DRREDDY	3.8	0.8
DMART	3.5	1.1
Short		
DIXON	28.2	-2.7
IRFC	11.2	-0.3
CDSL	6.9	-0.3
ZYDUSLIFE	5.1	-0.6
TRENT	4.9	-0.3
Long Unwinding		
RVNL	-10.2	-1.9
DALBHARAT	-9.4	-1.7
KAYNES	-8.8	-1.4
GODFRYPHLP	-8.0	-0.4
BOSCHLTD	-7.7	-0.1
Short Covering		
NMDC	-12.2	1.7
SBICARD	-10.1	0.8
SAIL	-8.1	2.5
VMM	-7.5	8.2
VOLTAS	-7.2	0.4

CEIGALL INDIA (CMP: 322, MARKET CAP: 5612 Cr., SECTOR: INFRASTRUCTURE / ROADS & HIGHWAYS)

NSE filing

Ceigall India has secured a ₹704.70 crore Frontier Highway order in Arunachal Pradesh, strengthening its road and highway infrastructure order book and expanding its presence in the Northeast.

Commodities	CMP	1D	YTD
Gold ($)	4,684	0.7%	8.5%
Silver ($)	69.4	0.8%	-4.1%

Currency	CMP	1D	YTD
USD/INR	95.7	0.0%	6.4%
EUR/INR	111.7	0.0%	5.8%
GBP/INR	130.5	0.0%	7.8%
JPY/INR	0.6	-0.1%	4.9%
EUR/USD	1.2	0.1%	-0.7%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
DIXON	14,570.00	14,412.00	1.08
PETRONET	295.95	293.00	1.00
ICICIPRULI	511.25	506.35	0.96
HINDALCO	1,058.50	1,048.60	0.94
NHPC	76.65	75.94	0.93

52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
SIEMENS	4,114	4,118	4,098	12-Aug-26
LENSKART	657	674	664	21-Aug-26
NAM-INDIA	1,248	1,270	1,266	20-Aug-26
RBLBANK	388	395	394	20-Aug-26
HFCL	239	239	234	19-Aug-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
HINDUNILVR	2,030	2,006	2,008	19-Aug-26
DABUR	398	396	398	21-Aug-26
IRCTC	484	481	483	21-Aug-26
PGHH	8,114	8,112	8,178	21-Aug-26
IRB	19	19	19	19-Aug-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
LIQUIDBETA	50	0	0	1,005
EBANK10	2,972	4	3	17
TVSSCS	40,350	360	811	133
LTFOODS	41,891	421	380	456
GSEC10ABSL	0	0	0	113
LARGEMID50	62	1	1	37
LAMBODHARA	984	22	17	142
BIOFILCHEM	353	8	9	33
PSUBANK	5,319	128	136	86
CLSEL	2,814	69	56	314
BANKNIFTY1	12,232	316	237	60
SHANTIGEAR	11,921	408	212	557
IDBI	72,743	2,510	2,786	89
RATNAMANI	904	31	58	2,698
MARATHON	3,184	118	87	423
HEALTHADD	732	30	33	17
BANG	491	20	17	34
BLS	29,684	1,277	2,427	242
RAMBHAJO	2,521	123	311	213
OPTIEMUS	2,150	107	125	590
RAJMET	4,135	234	232	4
HEXT	2,705	155	180	559
RBZJEWEL	1,239	74	85	144
GUJALKALI	990	60	57	723
VMM	1,54,604	9,942	8,913	114

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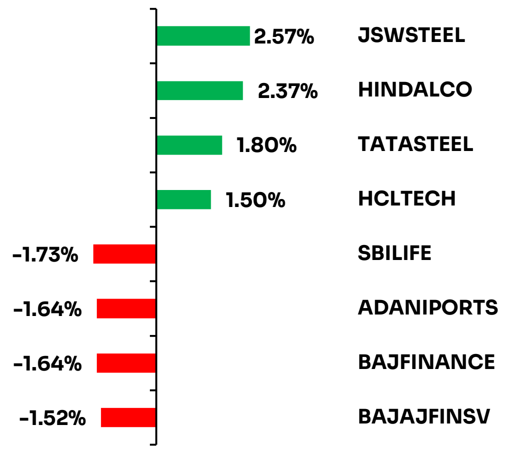
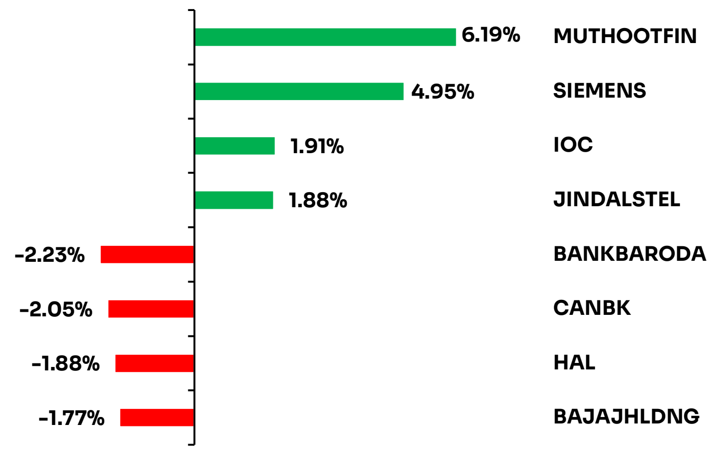
Daily Updates

Top Losers & Gainers

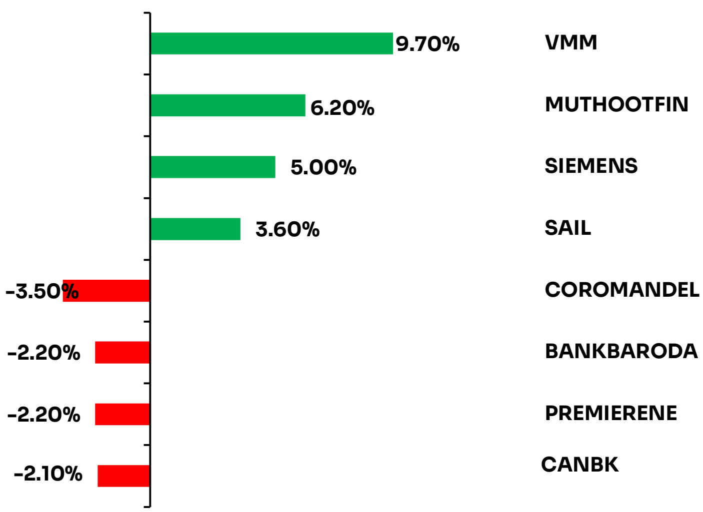
Nifty 50



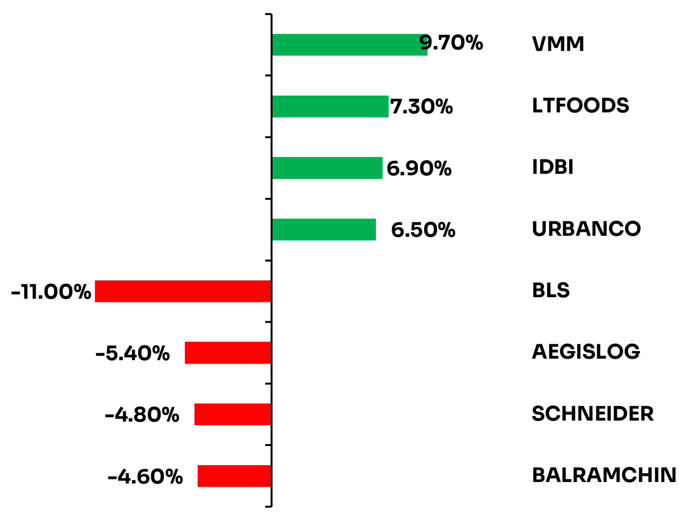
Nifty Next 50



Nifty 200



Nifty 500



Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
ALLCARGO	HRTI PRIVATE LIMITED	BUY	9048	13
ALLCARGO	HRTI PRIVATE LIMITED	SELL	9701	13
ALLCARGO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	8219	13
ALLCARGO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	8222	13
ARIS	NEW BERRY ADVISORS LTD	SELL	745	146
ARIS	VIRTI ENTERPRISE	SELL	504	141
ASIANTILES	ARTHKUMBH VENTURES LLP	BUY	2460	46
ATALREAL	ACME CAPITAL MARKET LIMITED	BUY	2003	33
ATALREAL	ACME CAPITAL MARKET LIMITED	SELL	2003	33
ATALREAL	ALTIZEN VENTURES LLP	BUY	752	33
ATALREAL	ALTIZEN VENTURES LLP	SELL	1207	33
ATALREAL	BULLPULSE MARKETEDGE PRIVATE LIMITED	SELL	650	33
ATALREAL	BULLPULSE MARKETEDGE PRIVATE LIMITED	BUY	650	33
ATALREAL	CHAUBARA EATS PRIVATE LIMITED	BUY	1500	33
ATALREAL	CHAUBARA EATS PRIVATE LIMITED	SELL	1500	33
ATALREAL	HJS SECURITIES PRIVATE LIMITED	BUY	760	33
ATALREAL	HJS SECURITIES PRIVATE LIMITED	SELL	760	33
ATALREAL	HRTI PRIVATE LIMITED	SELL	309	33
ATALREAL	HRTI PRIVATE LIMITED	BUY	897	33
ATALREAL	JIAUM BROKING LLP	BUY	900	33
ATALREAL	JIAUM BROKING LLP	SELL	900	33
ATALREAL	L7 HITECH PRIVATE LIMITED	BUY	250	34
ATALREAL	L7 HITECH PRIVATE LIMITED	SELL	625	34
ATALREAL	QE SECURITIES LLP	SELL	605	33
ATALREAL	QE SECURITIES LLP	BUY	675	33
ATALREAL	VISHAL MAHESH WAGHELA	SELL	720	34
ATALREAL	VISHAL MAHESH WAGHELA	BUY	720	33
BALUFORGE	HRTI PRIVATE LIMITED	SELL	542	622
BALUFORGE	HRTI PRIVATE LIMITED	BUY	637	619
BALUFORGE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	607	621
BALUFORGE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	611	621
BALUFORGE	RAMDOOT REALTORS PVT LTD	SELL	652	620
BALUFORGE	RAMDOOT REALTORS PVT LTD	BUY	654	618
BIOFILCHEM	IRAGE BROKING SERVICES LLP	SELL	18	32
BIOFILCHEM	IRAGE BROKING SERVICES LLP	BUY	199	32
BIOFILCHEM	ORION STOCKS LTD	BUY	33	32
BIOFILCHEM	ORION STOCKS LTD	SELL	250	32
BIOPOL	CRAFT EMERGING MARKET FUND PCC-CITADEL	SELL	120	99
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	BUY	42	282
COMSYN	ARIHANT CAPITAL MARKETS LIMITED	SELL	293	273
CORALFINAC	IRAGE BROKING SERVICES LLP	SELL	35	35
CORALFINAC	IRAGE BROKING SERVICES LLP	BUY	204	35
CORALFINAC	ORION STOCKS LTD	BUY	24	35
CORALFINAC	ORION STOCKS LTD	SELL	208	35
DAVANGERE	ARIHANT CAPITAL MARKETS LIMITED	BUY	3392	3

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
DAVANGERE	ARIHANT CAPITAL MARKETS LIMITED	SELL	10706	3.0
DHAMPURSUG	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	325	192.8
DHAMPURSUG	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	326	192.6
DJML	D3 STOCK VISION LLP	SELL	48	88.8
DJML	D3 STOCK VISION LLP	BUY	186	88.0
DJML	HARENDRA M PARIKH	SELL	174	87.6
DJML	MSB E TRADE SECURITIES LIMITED	BUY	388	107.7
DJML	MSB E TRADE SECURITIES LIMITED	SELL	389	103.5
DWARKESH	HRTI PRIVATE LIMITED	SELL	1454	57.5
DWARKESH	HRTI PRIVATE LIMITED	BUY	1512	57.4
DWARKESH	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1638	57.4
DWARKESH	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1638	57.4
DWARKESH	QE SECURITIES LLP	SELL	1300	57.3
DWARKESH	QE SECURITIES LLP	BUY	1301	57.9
FASCINATE	KANODIA STOCK BROKING PVT.LTD.	BUY	100	120.8
FASCINATE	MADHAV STOCK VISION PVT LTD	BUY	72	120.1
GATECH	EBISU GLOBAL OPPORTUNITIES FUND LIMITED	SELL	10500	0.9
GATECH	L7 HITECH PRIVATE LIMITED	BUY	2158	0.9
GATECH	L7 HITECH PRIVATE LIMITED	SELL	8027	0.9
GATECH	MGO HIGH CONVICTION FUND INC. VCC SUB-FUND	SELL	52000	0.9
GCSL	L7 HITECH PRIVATE LIMITED	SELL	52	508.3
GCSL	L7 HITECH PRIVATE LIMITED	BUY	208	505.6
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	81	508.5
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	169	505.4
GRADIENTE	PINNAMANENI ESTATES PRIVATE LIMITED	BUY	326	3.0
GRADIENTE	PINNAMANENI ESTATES PRIVATE LIMITED	SELL	3718	3.0
GRADIENTE	SAI ROSHNI CAPITAL PRIVATE LIMITED	BUY	3180	3.0
GULFPETRO	AIO GROWTH CAPITAL FUND SPC	SELL	1171	67.0
KSR	ASHA MAHESH MEHTA	BUY	100	28.6
LALITHAA	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	6692	265.6
LALITHAA	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	6692	265.7
LAMBODHARA	BHAVNA RAJIV DADLANI	BUY	70	138.1
LAMBODHARA	RAJIV INDUR DADLANI	BUY	90	128.9
LTFOODS	MICROCURVES TRADING PRIVATE LIMITED	BUY	2058	469.1
LTFOODS	MICROCURVES TRADING PRIVATE LIMITED	SELL	2058	469.4
MOBILISE	ASHUTOSH DHIRENDRAKUMAR MANIAR	BUY	48	102.9
MOBILISE	BHANSALI VALUE CREATIONS PVT LTD	SELL	48	102.9
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	SELL	12540	17.2
MOTISONS	ARIHANT CAPITAL MARKETS LIMITED	BUY	12540	17.2
PCJEWELLER	HRTI PRIVATE LIMITED	SELL	31859	10.9
PCJEWELLER	HRTI PRIVATE LIMITED	BUY	51076	10.9
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	61172	10.9
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	61172	10.9
QUADFUTURE	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	385	437.9
QUADFUTURE	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	385	437.8

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
QUADFUTURE	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	SELL	244	452.5
QUADFUTURE	DIPAN MEHTA COMMODITIES PRIVATE LIMITED	BUY	252	450.7
QUADFUTURE	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	SELL	525	449.3
QUADFUTURE	ELIXIR WEALTH MANAGEMENT PRIVATE LIMITED	BUY	540	447.8
QUADFUTURE	HRTI PRIVATE LIMITED	BUY	324	438.9
QUADFUTURE	HRTI PRIVATE LIMITED	SELL	338	435.2
QUADFUTURE	IRAGE BROKING SERVICES LLP	SELL	444	446.7
QUADFUTURE	IRAGE BROKING SERVICES LLP	BUY	656	448.2
QUADFUTURE	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	871	447.6
QUADFUTURE	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	871	447.5
QUADFUTURE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1279	444.7
QUADFUTURE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1281	444.5
QUADFUTURE	MICROCURVES TRADING PRIVATE LIMITED	SELL	1729	448.3
QUADFUTURE	MICROCURVES TRADING PRIVATE LIMITED	BUY	1729	448.0
QUADFUTURE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	335	449.5
QUADFUTURE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	335	449.8
QUADFUTURE	QE SECURITIES LLP	SELL	493	435.6
QUADFUTURE	QE SECURITIES LLP	BUY	495	437.6
QUADFUTURE	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	232	441.9
QUADFUTURE	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	232	442.1
RAMBHAJO	L7 HITECH PRIVATE LIMITED	SELL	84	211.6
RAMBHAJO	L7 HITECH PRIVATE LIMITED	BUY	377	208.6
RAMBHAJO	NAVRATRI SHARE TRADING PRIVATE LIMITED .	BUY	400	211.4
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	1823	263.4
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	1878	262.2
RATNAVEER	CRABEL VINTRADE PRIVATE LIMITED	BUY	450	262.8
RATNAVEER	HRTI PRIVATE LIMITED	BUY	402	264.3
RATNAVEER	HRTI PRIVATE LIMITED	SELL	596	262.4
RATNAVEER	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	385	261.0
RATNAVEER	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	388	261.1
RATNAVEER	NITN KAPOOR	SELL	400	260.3
RATNAVEER	THAKKAR NILESHKUMAR FARSHURAM HUF	BUY	950	263.0
RFBL	JAGID VANITABEN RAJENDRAPRASAD	BUY	36	95.5
RFBL	JAGID VANITABEN RAJENDRAPRASAD	SELL	156	99.5
RFBL	RIDDHI SIDDHI INTERNATIONAL	BUY	222	99.5
RHETAN	JAGID VANITABEN RAJENDRAPRASAD	SELL	2718	22.1
RHETAN	JAGID VANITABEN RAJENDRAPRASAD	BUY	4400	22.0
SANGINITA	NEO APEX SHARE BROKING SERVICES LLP	SELL	204	53.6
SANGINITA	NEO APEX SHARE BROKING SERVICES LLP	BUY	525	53.6
SENCO	VISION AHEAD SERVICES PRIVATE LIMITED	BUY	1000	365.7
SETL	AMANSA INVESTMENTS LIMITED	SELL	1508	312.6
SHANTIGEAR	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	663	529.9
SHANTIGEAR	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	666	530.0
SHANTIGEAR	MICROCURVES TRADING PRIVATE LIMITED	BUY	558	529.1
SHANTIGEAR	MICROCURVES TRADING PRIVATE LIMITED	SELL	558	529.1

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
SHANTIGEAR	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	431	527.5
SHANTIGEAR	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	432	527.3
SHIVAUM	ARIHANT CAPITAL MARKETS LIMITED	BUY	130	445.0
SHIVAUM	ARYAMAN CAPITAL MARKETS LIMITED	SELL	126	445.0
STRIDERS	ANISH RAMJI SHAH	BUY	154	62.8
STRIDERS	UPSURGE OPPORTUNITIES FUND 1	SELL	139	62.8

Block Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
Meesho Limited	AAGAM INVESTMENTS	BUY	1250	200
Meesho Limited	BAJAJ LIFE INSURANCE LIMITED	BUY	1250	200
Meesho Limited	BNP PARIBAS FINANCIAL MARKETS	BUY	1500	200
Meesho Limited	BOFA SECURITIES EUROPE SA	BUY	1250	200
Meesho Limited	CANARA ROBECO MUTUAL FUND	BUY	1500	200
Meesho Limited	CITIGROUP GLOBAL MARKETS MAURITIUS PRIVATE	BUY	1500	200
Meesho Limited	EDELWEISS MUTUAL FUND	BUY	3471	200
Meesho Limited	FRANKLIN TEMPLETON INVESTMENT FUNDS	BUY	1500	200
Meesho Limited	FRANKLIN TEMPLETON MUTUAL FUND	BUY	2500	200
Meesho Limited	GHISALLO MASTER FUND LP	BUY	1250	200
Meesho Limited	GOLDMAN SACHS BANK EUROPE SE	BUY	1425	200
Meesho Limited	GOLDMAN SACHS INVESTMENTS MAURITIUS	BUY	1250	200
Meesho Limited	HDFC STANDARD LIFE INSURANCE COMPANY LTD	BUY	7500	200
Meesho Limited	HSBC MUTUAL FUND	BUY	1500	200
Meesho Limited	INTEGRATED CORE STRATEGIES (ASIA) PTE.LTD.	BUY	1750	200
Meesho Limited	KOTAK SECURITIES LIMITED	BUY	0	200
Meesho Limited	KUWAIT INVESTMENT AUTHORITY	BUY	977	200
Meesho Limited	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	1259	200
Meesho Limited	MORGAN STANLEY ASIA SINGAPORE PTE	BUY	1700	200
Meesho Limited	NIPPON INDIA MUTUAL FUND	BUY	10000	200
Meesho Limited	ROBECO CAPITAL GROWTH FUNDS	BUY	523	200
Meesho Limited	SOCIETE GENERALE	BUY	2375	200
Meesho Limited	VIRIDIAN ASIA OPPORTUNITIES MASTER FUND	BUY	1250	200
Meesho Limited	Y COMBINATOR CONTINUITY HOLDINGS I LLC	SELL	23028	200
Meesho Limited	YCS16 HOLDINGS LLC	SELL	20604	200
Meesho Limited	YCVC FUND I L.P.	SELL	4848	200

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

Company	Purpose
Ardee Industries Limited	Financial Results
Fedbank Financial Services Limited	Fund Raising
Laxmi India Finance Limited	Fund Raising
MV Electrosystems Limited	Financial Results
The State Trading Corporation of India Ltd.	Financial Results

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Daily Updates

Nifty & Bank Spot – Pivot Levels 25/08/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	24219.05	24137	24056	23968	24306	24394	24475
Bank Nifty	57525.95	57222	56919	56594	57850	58175	58478

Muthoot Finance Ltd – Technical Stock Call – 25/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
MUTHOOTFIN	BUY	3209	4000	(3115-3050)-3000-(2960-2905)	2811

Sector: Financial Services (INE414G01012)

About: Muthoot Finance Limited is India's largest Gold Loan NBFC (Non-Banking Financial Company) and the flagship company of the Muthoot Group. The company primarily provides loans against gold jewellery, along with personal loans, business loans, housing finance, insurance, money transfer, and wealth management services. It has one of the largest branch networks in the country, serving customers across urban and rural India.

View – Medium Term Bullish

The stock commenced its downtrend from 4149.50 (JAN 26).
Stock started trading below the averages & forming lower tops gradually reached a low of 2671(AUG 26).
During the correction phase, the stock traded into a narrow descending channel, trading around the averages.
Buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Falling Wedge – Reversal Breakout** on the weekly chart supported by volumes with a bullish candle reaching to a high of 3209 (AUG 26), which is higher than the previous swing highs.

Indicators like Stoch RSI& TSI suggests positive crossover.

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

Target of **4000** is expected with lower support levels at **(3115-3050)-3000-(2960-2905)** in case of intermediate fall.
A stop loss at **2811** is to be followed for the trade.
All the calls/opinions are subject to Disclosures and Disclaimer http://goo.gl/8bCMyQ

NMDC Ltd – Technical Stock Call – 25/08/2026

Technical Stock Call	Action	Reco	Target	Support	SL
NMDC	BUY	85.90	110	(83-79.50-76)	73.50

<u>Sector:</u> Metals & Mining (INE584A01023)

<u>About:</u> NMDC Limited is India's largest iron ore mining company and a Navratna Public Sector Undertaking (PSU) under the Ministry of Steel. The company is engaged in the exploration, mining, and production of iron ore, along with a smaller presence in diamonds and other minerals. It is one of the world's lowest-cost iron ore producers and supplies raw material to major steel manufacturers.

<u>View – Short Term Bullish</u>

The stock commenced its downtrend from 97.49 (JUN 26).

Stock started trading below the averages & breached 200 SMA, further extended its decline to mark a low of 81.05 (AUG 26). During the correction phase, the stock traded flat during the period JUN 26_AUG 26, trading around the averages seeking trend direction.

The stock attracted buying interest & commenced its up move reaching a high of 87.19 (AUG 26) & recently, after forming higher bottoms, the stock has given a **Falling Wedge – Reversal Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 86.54 (AUG 26), which is higher than the previous swing highs.

Indicators like Stoch RSI, Williams %R & TSI suggests positive crossover. The stock is trading above 200 SMA.

Target of **110** is expected with lower support levels at **(83-79.50-76)** in case of intermediate fall.

A stop loss at **73.50** is to be followed for the trade.

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

Global Macro Events (25th August 2026)

Event	Previous	Forecasted
USA		
Chicago Fed National Activity Index JUL	0.06	0.10
3-Month Bill Auction	0.04	
6-Month Bill Auction	0.04	
Treasury Secretary Bessent Speech		
Fed Barkin Speech		
ADP Employment Change Weekly	9.5K	
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	90.80	90.90
New Home Sales JUL	0.628M	0.62M
New Home Sales MoM JUL	0.02	-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	
Building Permits Final JUL	1.374M	1.443M
Building Permits MoM Final JUL	-0.03	0.05
Germany		
11-Month Bubill Auction	0.03	
5-Month Bubill Auction	0.02	
GDP Growth Rate QoQ Final Q2	0.00	0.00
GDP Growth Rate YoY Final Q2	0.01	0.01
Ifo Business Climate AUG	86.60	87.00
Ifo Current Conditions AUG	86.50	86.90
Ifo Expectations AUG	86.70	87.10
2-Year Schatz Auction	0.03	
Great Britain		
Treasury Gilt 2033 Auction	0.05	

Section1: Stock specific news

TCS: Porsche AI deal, MHP buy
TCS will acquire 100% of Porsche's IT consulting subsidiary MHP for €320 million and has secured a five-year strategic partnership with Porsche worth €1.25 billion. It will also establish an AI Mobility Centre of Excellence for Porsche. (Reuters)

Hindustan Copper: Government launches stake OFS
The Government of India has announced an OFS of up to 2.90 crore Hindustan Copper shares. The floor price has been fixed at ₹514/share, with the non-retail offer opening on August 25 and retail on August 26.

Ratnamani: Wins ₹2,700 crore export orders
Subsidiary Ratnamani Finow Spooling Solutions has secured USD 286 million (~₹2,700 crore) of export orders for spools and hangers. The orders are expected to be executed over 2–3 years. (Business Standard)

Insolation Energy: Wins 99 MW solar projects
Subsidiary Insolation Green Energy has received LOAs from MSEDCL for nine solar projects aggregating 99 MW AC / 128.7 MW DC. The projects are expected to generate around ₹59.72 crore annual revenue for 25 years. (BazaarWatch)

Tata Power: Commissions 190.5 MW FDRE project
Tata Power Renewable Energy has commissioned a 190.5 MW Firm and Dispatchable Renewable Energy project in Rajasthan. The commissioning adds to Tata Power's operational renewable-energy portfolio.

Aegis Vopak: Buys Pipavav ammonia terminal
Subsidiary Aegis Terminal Pipavav will acquire a 36,000 MT ammonia storage terminal from promoter Aegis Logistics for ₹525 crore. The transaction adds specialised ammonia storage capacity at Pipavav Port. (BazaarWatch)

BLS International: Rejects visa irregularity media allegations
BLS International issued a clarification categorically rejecting allegations of involvement in visa irregularities reported in the media. The disclosure is important given the potential reputational and business implications of such reports.

Fujiyama Power: Adds two GWh battery capacity
Fujiyama plans a new 1 GWh tubular-battery facility at Hathras, Uttar Pradesh, along with another 1 GWh lithium-battery capacity expansion at Ratlam, Madhya Pradesh. Together, the announcements materially expand battery manufacturing capacity.

Afcons: Wins ₹335.5 crore arbitration award
Afcons has received a favourable arbitral award of ₹335.50 crore against UPEIDA, comprising ₹152.25 crore principal and ₹183.25 crore interest. Receipt remains subject to the counterparty's right to challenge the award. (BazaarWatch)

Smartworks: Adds ₹235 crore contracted rentals
Smartworks announced ₹235 crore of incremental contracted rental revenue driven by expansions from enterprise clients. The development improves revenue visibility from its managed-office portfolio.

Viviana Power: Emerges L1 for ₹275 crore
Viviana Power Tech has emerged as L1 bidder for a ₹275.05 crore MGVCL project. The scope involves conversion of existing 11 KV networks into MVCC overhead conductor and underground networks across parts of Gujarat.

KPI Green: Signs strategic investment collaboration LOI
KP Group and Raz Holding Group have signed a non-binding LOI for a proposed strategic investment and/or collaboration. The agreement could support the group's renewable-energy growth and broader strategic initiatives.

Coromandel: Opens new drone manufacturing facility
Coromandel's Dhaksha Unmanned Systems has inaugurated a new manufacturing facility at Kancheepuram. The facility is aimed at strengthening indigenous drone manufacturing capabilities and supporting future scale-up.

Syngene: Invests in renewable power SPV
Syngene has entered into agreements with Ampin C&I Power Twelve to acquire a stake for sourcing renewable electricity. The investment supports increased renewable-energy usage across Syngene's operations. (BazaarWatch)

JTL Industries: Expands narrow-width HR coil capacity
Subsidiary JTL Engineering plans approximately ₹15 crore investment to expand narrow-width hot-rolled coil manufacturing capacity. The expansion is intended to enhance manufacturing capabilities and support downstream operations. (The Economic Times)

Fineotex: ICRA upgrades long-term credit rating
ICRA upgraded Fineotex Chemical's long-term rating to AA- (Stable) from A+ (Positive) while reaffirming the short-term rating at A1+. ICRA cited improved scale, diversification and financial risk profile. (BazaarWatch)

Pavna: Reshapes subsidiary investment portfolio
Pavna Industries approved acquisition of a 52.38% stake in Pavna Electric Systems, making it a subsidiary. It also approved divestments of stakes in existing subsidiaries as part of portfolio restructuring. (BazaarWatch)

Refex: Wins ₹33.7 crore fly-ash contracts
Refex Industries secured two domestic contracts aggregating ₹33.70 crore for fly-ash loading, transportation and excavation. Both contracts have an execution period of around 120 days. (IDBI Capital)

GPT Infra: Subsidiary L1 for ₹97 crore
GPT Infraprojects' wholly owned subsidiary Alcon Builders and Engineers has emerged as the L1 bidder for an order valued at ₹97.31 crore. The potential award would add to the company's executable order book.

S&S Power: Wins Hitachi isolator supply order
Subsidiary S&S Power Switchgear Equipment has received an order from Hitachi Energy India to supply isolators for a Karnataka project. The order is valued at over ₹8–10 crore, with execution expected during March–June 2027. (EquityBulls)

Krystal: Wins five-year Maharashtra manpower contract
Krystal Integrated Services secured a ₹17.25 crore manpower services contract from Maharashtra Rajya Sahakari Sangh. The five-year contract runs from September 2026 to August 2031. (IDBI Capital)

Veranda Learning: NCLT approves commerce business demerger
Veranda Learning has received NCLT approval for the demerger of its commerce vertical. The restructuring is expected to create a more focused organisational structure for the business.

Allied Blenders: Starts local production in Malaysia
Allied Blenders and Distillers has commenced local production in Malaysia, supporting the company's international expansion strategy. The move helps deepen its presence in overseas alcoholic-beverage markets.

Tolins Tyres: Starts new reclaim-rubber facility construction
A wholly owned subsidiary of Tolins Tyres has commenced construction of a new reclaim-rubber manufacturing facility. The project supports backward integration and expansion of the company's recycling-related operations.

Shivalik Bimetal: Advances Pune Phase-II facility approvals
Shivalik Bimetal is progressing with Phase II of its Pune facility and is currently obtaining the necessary regulatory approvals and permissions. The expansion supports its move into higher-value assemblies and electrification applications. (BazaarWatch)

Coal India: Forms Singapore global subsidiary
Coal India has incorporated a new wholly owned Singapore-based subsidiary named CIL Global Pte. Ltd. The entity provides a platform for the company's international business and overseas growth initiatives.

ICICI Bank: Prices $1 billion global notes
ICICI Bank's IFSC Banking Unit has priced $1 billion senior unsecured fixed-rate notes under its $7.5 billion Global Medium-Term Note programme. Moody's and S&P assigned Baa3 and BBB ratings, respectively.

HEG: Composite scheme triggers major restructuring
HEG's composite scheme will become effective from September 1, 2026, triggering business and management restructuring. Riju Jhunjhunwala will become Chairman, MD & CEO, while a September 7 record date has been fixed under the scheme.

Dabur: NCLT reserves Sesa Care merger
The NCLT New Delhi Bench has reserved its order on the second-motion petition concerning the amalgamation of Sesa Care Private Limited with Dabur India. The filing marks another step toward completion of the proposed merger.

Kellton Tech: Wins U.S. healthcare AI platform
Kellton Tech has been selected to build an AI-driven enterprise claims-management platform for a leading U.S. healthcare company. The project strengthens its positioning in AI-led digital transformation and healthcare technology.

Section2: Macro / Non-Stock News

Sector Rotation Favours Metals, Realty and IT

Metals, realty and IT outperformed, while PSU banks, media and banking stocks lagged. Higher yields and crude volatility continue to drive tactical sector rotation.

Bank Nifty Derivatives Show Call-Heavy Positioning Ahead of Expiry

Bank Nifty's August 25 option chain showed PCR near 0.67, indicating relatively heavy call positioning. This suggests overhead resistance and cautious positioning ahead of expiry.

Rupee Ends Near 95.75 as RBI Intervention Suppresses Volatility

The rupee closed near 95.745 per dollar, with state-run banks seen selling dollars. RBI intervention and strong reserves are limiting volatility despite elevated crude prices.

Indian Bond Yields Remain Elevated Near 6.85%

India's 10-year bond yield remained near 6.85% after a sharp weekly rise. Crude prices, US yields and RBI policy expectations remain the major near-term drivers.

India-GCC Free Trade Talks Regain Momentum

India and the GCC resumed discussions on a comprehensive FTA. Bilateral trade stood at $178.56 billion in FY25, making the agreement strategically important for energy and merchandise trade.

India-Russia Trade Rises 8% in H1 2026

India-Russia trade increased 8% in H1 2026, with both countries targeting $100 billion by 2030. Russia also offered higher fertiliser supplies to India.

India-Iran Trade Faces Fresh Sanctions Risk

Fresh US sanctions could further disrupt Indian exports of rice, tea and pharmaceuticals to Iran. Bilateral trade has already fallen sharply from FY19 levels.

Finance Minister Heads to Canada and US for Investment and G20 Meetings

Nirmala Sitharaman will visit Canada and the US from August 25 to September 2 for investment talks and the G20 finance ministers' meeting. Energy, AI and critical minerals will be key focus areas.

Disclosures and Disclaimer

Ventura Securities Limited - SEBI Registration No.: INH000001634

Corporate Office: I-Think Techno Campus, 8th Floor, ‘B’ Wing, Off Pokhran Road No 2, Eastern Express Highway, Thane (W) – 400608