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Daily Updates

Market Commentary

Overnight global action:

On 8th September 2026, US markets remained closed on 7th September 2026 due to the Labor Day holiday; hence, the previous trading session data has been considered. The S&P 500 declined by 29.1 pts (-0.38%), Dow Jones fell by 271.9 pts (-0.51%), while Nasdaq 100 advanced by 61.8 pts (+0.21%). Gift Nifty declined by 29.5 pts (-0.12%), indicating a cautious opening for Indian markets

NSE breadth remained positive with 1,507 advances against 2,083 declines, while BSE witnessed 1,925 advances versus 4,745 declines.

Index Options Data Analysis:

Nifty OI peaks at 24,000 Calls and 23,500 Puts. PCR stands at 0.68
Sensex OI peaks at 76,500 Calls and 76,000 Puts. PCR stands at 0.65
Bank Nifty Call and Put OI both peak at 57,500 — heavy ATM congestion zone. PCR stands at 1.19.

Securities in Ban for F&O Trade:

INOXWIND, KAYNES, SAIL, LICHSGFIN

Sector Performance:

NIFTY MICROCAP 250 index grew by 0.0042 % driven by PCJEWELLER(+17.96%), STAR(+10.04%), BBOX(+9.09%)

NIFTY SMALLCAP 250 index grew by 0.0013 % driven by SYRMA(+11.64%), WOCKPHARMA(+5.94%), CARTRADE(+5.89%)

NIFTY SMALLCAP 50 index grew by 0.0007 % driven by WOCKPHARMA(+5.94%), NH(+2.95%), PPLPHARMA(+2.46%)

NIFTY FPI 150 index declined by -0.0055 % dragged by INFY(-3.76%), ICICIPRULI(-4.83%), PIDILITIND(-3.34%)

NIFTY 50 index declined by -0.005 % dragged by SBILIFE(-2.42%), INFY(-3.76%), HDFCLIFE(-2.42%)

NIFTY 100 index declined by -0.0048 % dragged by PIDILITIND(-3.34%), INFY(-3.76%), SBILIFE(-2.42%)

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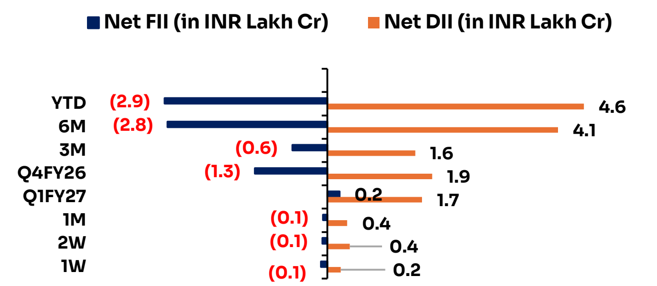
Fund Flow - 8th Sep	Buy	Sell	Net
FII/FPI (INR Cr)	9,581.2	9,301.1	280.1
DII (INR Cr)	13,154.1	12,587.4	566.8



Indian Indices	CMP	1D	YTD	P/E x
Gift Nifty	23,797	-0.12%	-9.43%	21.6
Sensex 30	76,133	-0.50%	-10.66%	19.9
Nifty 50	23,779	-0.57%	-9.07%	21.6
India VIX	11	3.77%	16.97%	
Nifty Bank	57,088	-0.49%	-4.19%	16.8
Nifty Next 50	72,576	-0.42%	4.63%	72.6
Nifty 500	23,156	-0.42%	-3.00%	21.7
Nifty Mid 100	62,786	-0.46%	3.81%	32.3
Nifty Small 250	18,484	0.01%	10.78%	31.1
USD/INR	94.5	0.00%	5.04%	
India 10Y	7.0%			
India 2Y	6.2%			
India 1Y	5.6%			
Bank Rate	5.8%			

Global Indices	CMP	1D	YTD	P/E x
S&P 500	7,719	-0.38%	12.75%	33.4
Dow Jones	53,414	-0.51%	11.13%	25.8
Nasdaq 100	29,544	0.21%	17.01%	48.5
FTSE 100	10,822	-0.08%	8.97%	17.1
CAC 40	8,306	0.33%	1.92%	24.4
DAX	26,007	-0.15%	6.19%	27.1
Nikkei 225	66,274	-0.19%	31.73%	35.4
Hang Seng	25,413	-0.93%	-0.85%	12.3
Shanghai Comp	3,933	0.07%	-0.91%	17.8
KOSPI	7,079	1.20%	68.14%	35.0
S&P/ASX 200	8,975	-0.40%	3.01%	23.7

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Daily Updates

Stocks in the News

TATA MOTORS PASSENGER VEHICLES (CMP: 307, MARKET CAP: 114722 Cr., SECTOR: AUTOMOBILES)

NSE Filing

JLR plans to reduce its global workforce by approximately 4,000 roles over two years, with direct manufacturing jobs not expected to be affected.The transformation programme targets £1.7 billion in savings over two years, lowering its breakeven towards 3,00,000 vehicles.Consultations have begun; JLR retains its commitment to invest £15–18 billion over five years in electrification, technology and manufacturing.

GE VERNOVA T&D INDIA (CMP: 4367, MARKET CAP: 111821 Cr., SECTOR: POWER TRANSMISSION EQUIPMENT)

NSE Filing

Power Grid identified GE Vernova as the L1 bidder for a 6,000 MW, ±800 kV HVDC terminal-station project.The scope covers design, supply and execution of two 3,000 MW terminals connecting Barmer II with South Kalamb for renewable-power evacuation.Execution would span multiple years. A final contract award and monetary value were not announced.

ADANI POWER (CMP: 204, MARKET CAP: 394353 Cr., SECTOR: POWER GENERATION)

NSE Filing

GVK Energy's Committee of Creditors approved Adani Power's resolution plan, and the company received an LOI on 7 September 2026.GVK Energy owns and operates a 330 MW hydroelectric plant in Uttarakhand through Alaknanda Hydro Power Company.The acquisition remains subject to NCLT Hyderabad and other applicable approvals; the purchase consideration was not disclosed.

HLE GLASCOAT (CMP: 336, MARKET CAP: 2335 Cr., SECTOR: INDUSTRIAL EQUIPMENT)

NSE Filing

Step-down subsidiary HLE Surface Technologies GmbH secured a contract worth approximately €20.56 million from FLC Portals Group I/S, Denmark.The order covers vitreous-enamel cladding panels for the tunnel connecting Germany's Fehmarn island with Denmark's Lolland island.Execution is due on or before April 2030; the contract was disclosed early on 8 September 2026.

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Sectoral Index	CMP	1D	YTD	P/E x
Nifty Auto	27,699	-0.04%	-1.74%	22.8
Nifty IT	29,982	-2.32%	-20.86%	23.4
Nifty Fin Ser	25,929	-0.47%	-6.10%	16.9
Nifty Pharma	26,676	0.75%	17.39%	43.9
Nifty Services	30,423	-0.50%	-9.61%	33.5
Nifty Cons Dur	39,319	-0.42%	6.97%	53.3
Nifty PSE	9,680	-0.31%	-1.76%	10.1
Nifty FMCG	45,592	-0.66%	-17.82%	31.4
Nifty Pvt Bank	27,746	-0.28%	-3.40%	10.4
Nifty PSU Bank	8,425	-1.06%	-1.27%	13.8
Nifty Cons	11,557	-0.35%	-5.96%	40.8
Nifty Energy	37,973	-0.25%	7.50%	12.0
Nifty Health	16,520	0.68%	12.84%	39.5
Nifty India Mfg	16,188	-0.21%	5.03%	30.1
Nifty Metal	13,153	-1.24%	17.78%	23.6
Nifty Oil & Gas	11,119	-0.61%	-9.09%	17.0

Derivatives Position (Combined)

Stock	% Chg OI	%Chg LTP
Long		
ATHERENERG	7.3	0.5
NAM-INDIA	7.2	3.0
SOLARINDS	6.5	1.7
COALINDIA	3.8	0.9
BANDHANBNK	3.7	0.3
Short		
ICICIPRULI	6.5	-5.0
WIPRO	5.7	-3.1
VMM	5.5	-2.3
MAHABANK	5.2	-1.4
HAVELLS	4.8	-0.9
Long Unwinding		
GRASIM	-3.8	-0.7
MFSL	-3.4	-1.8
SBILIFE	-3.0	-2.4
OIL	-2.9	-0.8
SUNPHARMA	-2.1	-0.3
Short Covering		
MOTILALOFS	-4.4	1.7
FORCEMOT	-4.2	1.3
MCX	-3.6	1.1
EICHERMOT	-3.2	0.3
SBICARD	-3.0	2.2

Daily Updates

AARTI INDUSTRIES (CMP: 491, MARKET CAP: 17793 Cr., SECTOR: SPECIALTY CHEMICALS)

NSE Filing

Aarti commissioned Phase I of Zone IV at Jhagadia, Gujarat, bringing calcium chloride, PEDA and part of its multipurpose plant on stream.PEDA extends its ethylation chain into agrochemical applications, while calcium chloride targets energy and oilfield applications.The next steps are customer qualification and production ramp-up; management targets progressive commercialisation of all Zone IV manufacturing blocks during FY27.

Commodities	CMP	1D	YTD
Gold ($)	4,420	0.33%	2.20%
Silver ($)	66.3	0.15%	-8.4%

Currency	CMP	1D	YTD
USD/INR	94.5	0.00%	5.04%
EUR/INR	109.9	0.01%	4.00%
GBP/INR	127.9	0.00%	5.67%
JPY/INR	0.6	0.40%	7.12%
EUR/USD	1.2	0.03%	-1.05%

Securities Lending & Borrowing Scheme

Company	Under.Ltp	Fut.Ltp	Spread (%)
KAYNES	3,604.00	3,520.00	2.33
IREDA	112.95	110.80	1.90
HAVELLS	1,150.00	1,136.50	1.17
HYUNDAI	2,210.00	2,189.00	0.95
OFSS	11,847.00	11,740.00	0.90

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52 Week High

Stock	LTP	New 52W high	Prev 52W high	Prev 52W high date
IDEA	16	16	15	26-Aug-26
LENSKART	689	697	695	4-Sep-26
RBLBANK	415	418	417	4-Sep-26
ANANDRATHI	2,225	2,255	2,242	28-Aug-26
PPLPHARMA	220	222	220	21-Aug-26

52 Week Low

Stock	LTP	New 52W low	Prev 52W low	Prev 52W low date
BRITANNIA	5,043	5,006	5,035	4-Jun-26
GODREJCP	862	857	860	3-Sep-26
ICICIGI	1,493	1,493	1,507	4-Sep-26
DABUR	376	374	377	4-Sep-26
PGHH	7,649	7,602	7,659	4-Sep-26

Volume Shockers

Stock	Vol (000)	1W avg vol (000)	2W avg vol (000)	LTP (INR)
BNKETFAXIS	501	1	1	588
GILT10BETA	504	2	1	26
UDAYJEW	638	3	2	165
TEXMOPIPES	2,194	18	35	54
SIMPLXREA	1	0	0	142
CHEMPLASTS	17,821	221	263	184
ANDHRAPAP	27,337	363	251	73
SIGNPOST	3,877	70	56	271
RIR	11,234	219	162	190
PASHUPATI	587	12	28	81
THEMISMED	4,733	128	409	133
MERCURYEV	4,167	113	115	38
ZYDUSWELL	7,627	211	283	552
GNRL	3,633	104	73	114
GILT5BETA	202	6	4	67
HAMPTON	369	12	19	8
KDGREEN	416	19	19	48
SBIETFIT	165	8	8	334
PDMJEPAPER	5,921	287	218	102
RPPINFRA	984	50	115	55
MOMENTUM30	360	19	31	31
TALBROAUTO	1,798	96	122	431
PITTIENG	1,699	95	184	1,177
MITTAL	11,586	684	784	1
MONQ50	562	34	29	170

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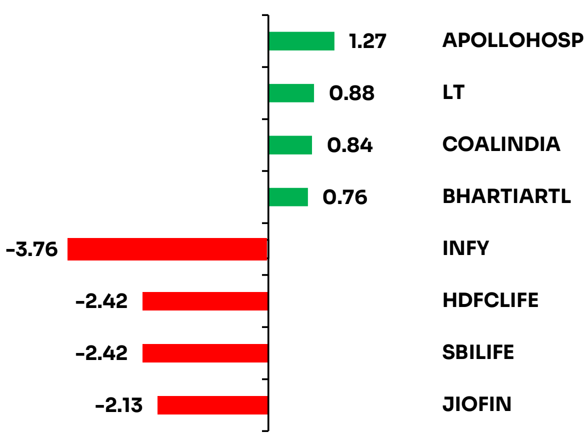
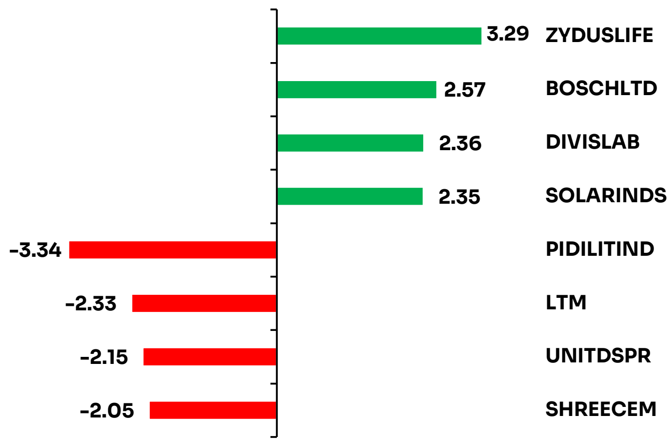
Top Gainers & Losers

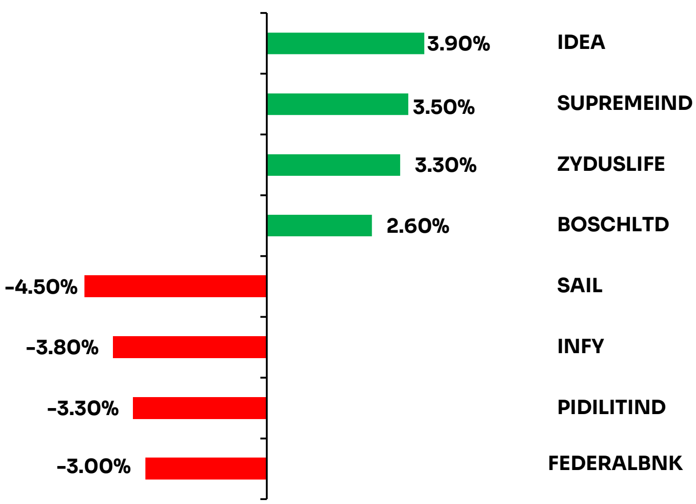
Nifty 50



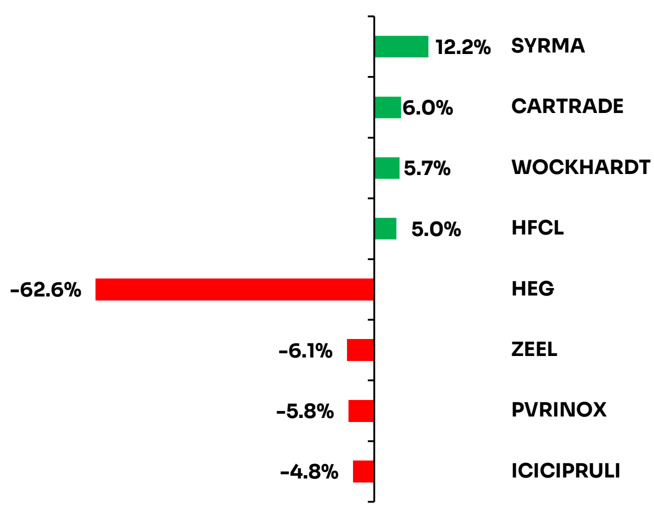
Nifty Next 50



Nifty 200



Nifty 500



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Daily Updates

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
AJOONI	ANANTHARAMAN JANAKI	SELL	1073	4
ANDHRAPAP	MICROCURVES TRADING PRIVATE LIMITED	SELL	1818	74
ANDHRAPAP	MICROCURVES TRADING PRIVATE LIMITED	BUY	1818	74
ANDHRAPAP	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1594	73
ANDHRAPAP	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1594	73
ANDHRAPAP	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	SELL	1311	72
ANDHRAPAP	SILVERLEAF CAPITAL SERVICES PRIVATE LIMITED	BUY	1311	72
ANTELOPUS	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	190	983
ANTELOPUS	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	190	983
ANTELOPUS	QE SECURITIES LLP	SELL	179	981
ANTELOPUS	QE SECURITIES LLP	BUY	180	976
ASHUTOSH	KIFS ENTERPRISE	BUY	174	140
ASHUTOSH	VENKATA NAGARAJU PADALA	BUY	149	141
ATALREAL	DHIRAJ JAIN	SELL	1300	27
ATALREAL	HARSHIL HITESH DOSHI	SELL	710	27
ATALREAL	HARSHIL HITESH DOSHI	BUY	840	27
ATALREAL	HILL TOP IMPEX PVT LTD .	SELL	800	27
ATALREAL	HRTI PRIVATE LIMITED	SELL	517	27
ATALREAL	HRTI PRIVATE LIMITED	BUY	683	27
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	SELL	3559	27
ATALREAL	JAGID VANITABEN RAJENDRAPRASAD	BUY	3559	27
ATALREAL	KARAN RASHMIKANT SHAH	BUY	800	27
ATALREAL	KARAN RASHMIKANT SHAH	SELL	800	26
ATALREAL	L7 HITECH PRIVATE LIMITED	SELL	1596	27
ATALREAL	L7 HITECH PRIVATE LIMITED	BUY	1654	27
ATALREAL	MAANOR INVESTMENTS PRIVATE LIMITED	SELL	1300	27
ATALREAL	MAHAMMADFARUK HAJIBHAI MIR	BUY	824	27
ATALREAL	MAHAMMADFARUK HAJIBHAI MIR	SELL	824	27
ATALREAL	MAHESH MULCHAND WAGHELA	SELL	1199	27
ATALREAL	MAHESH MULCHAND WAGHELA	BUY	1949	27
ATALREAL	NIRAJ HARSUKHLAL SANGHAVI	BUY	2000	26
ATALREAL	NIRAJ HARSUKHLAL SANGHAVI	SELL	2000	27
ATALREAL	PARKER PRECIOUS METALS LLP	BUY	1886	27
ATALREAL	RATHOD DIGVIJAYSINH RAJENDRASINH	BUY	1380	27
ATALREAL	RATHOD DIGVIJAYSINH RAJENDRASINH	SELL	1380	27
ATALREAL	SEEMA JAIN	SELL	780	26
ATALREAL	SHARBHANG COMMERCIAL COMPANY PRIVATE LIMITED	SELL	800	27
ATALREAL	TRADEFLOW DYNAMICS PRIVATE LIMITED	BUY	3500	27
ATALREAL	VIMLA DEVI PRATAPMAL JAIN	SELL	734	27
ATALREAL	VISHAL MAHESH WAGHELA	BUY	800	27
ATALREAL	VISHAL MAHESH WAGHELA	SELL	800	27
BI	GUTTIKONDA VARA LAKSHMI	BUY	126	101
BIRLACABLE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	141	359
BIRLACABLE	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	BUY	158	360
BODALCHEM	NEO APEX SHARE BROKING SERVICES LLP	BUY	735	170

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Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
BODALCHEM	NEO APEX SHARE BROKING SERVICES LLP	SELL	735	171
EDELWEISS	VENKATCHALAM ARAKONI RAMASWAMY	SELL	5000	131
ETML	AMIT CHORDIA(HUF)	SELL	100	80
FASCINATE	DV STOCK VISION LLP	BUY	100	65
FASCINATE	KUBER INVESTMENTS	BUY	101	65
FMGOETZE	HRTI PRIVATE LIMITED	BUY	201	477
FMGOETZE	HRTI PRIVATE LIMITED	SELL	281	476
GCSL	BONANZA AGENCY LLP	SELL	225	605
GCSL	HRTI PRIVATE LIMITED	SELL	21	606
GCSL	HRTI PRIVATE LIMITED	BUY	160	606
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	BUY	96	605
GCSL	MANSUKH SECURITIES & FINANCE LIMITED	SELL	130	607
GMMPFAUDLR	PERSISTENCE CAPITAL FUND I	BUY	240	1236
HEG	HDFC MUTUAL FUND	BUY	993	266
HIKAL	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	1417	246
HIKAL	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	1417	246
HIKAL	HRTI PRIVATE LIMITED	SELL	565	244
HIKAL	HRTI PRIVATE LIMITED	BUY	629	243
HIKAL	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	761	245
HIKAL	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	769	245
HIKAL	MICROCURVES TRADING PRIVATE LIMITED	BUY	1905	246
HIKAL	MICROCURVES TRADING PRIVATE LIMITED	SELL	1905	246
HIKAL	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	1001	246
HIKAL	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	1001	245
HIKAL	QE SECURITIES LLP	BUY	1079	245
HIKAL	QE SECURITIES LLP	SELL	1089	245
INDOTHAI	NEO APEX SHARE BROKING SERVICES LLP	BUY	1766	34
INDOTHAI	NEO APEX SHARE BROKING SERVICES LLP	SELL	3698	37
INDOTHAI	PRIJAL TRADEFIN LLP	SELL	1200	36
INDOTHAI	PRIJAL TRADEFIN LLP	BUY	1666	36
INDOTHAI	SAHASTRAA ADVISORS PRIVATE LIMITED	BUY	1286	36
INDOTHAI	SAHASTRAA ADVISORS PRIVATE LIMITED	SELL	1286	36
JINDWORLD	HRTI PRIVATE LIMITED	BUY	8500	57
JINDWORLD	HRTI PRIVATE LIMITED	SELL	9695	58
JINDWORLD	QE SECURITIES LLP	SELL	5386	57
JINDWORLD	QE SECURITIES LLP	BUY	5403	57
KOPRAN	UNITED SHIPPERS LTD	SELL	500	235
KSR	ALPA WEALTH CREATOR	SELL	126	34
KSR	SIDDHARTHA DAGA	BUY	126	34
LUMINO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	3753	117
LUMINO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	3806	118
MARKOLINES	VISTAAR TRADING SERVICE PRIVATE LIMITED	SELL	131	176
MARKOLINES	VISTAAR TRADING SERVICE PRIVATE LIMITED	BUY	136	174
MERCURYEV	SHREE SAIBABA EXIM PRIVATE LIMITED	SELL	4000	37
MITTAL	ARUN S PAI	SELL	484	1

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Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
MITTAL	ARUN S PAI	BUY	4295	1
MITTAL	BHAVESH JAIN	SELL	2663	1
MOS	ASHOK INVESTORS TRUST LIMITED	SELL	1480	7
MVELECTRO	BLITZQUANT RESEARCH LLP	SELL	182	814
MVELECTRO	BLITZQUANT RESEARCH LLP	BUY	182	814
MVELECTRO	HRTI PRIVATE LIMITED	SELL	809	812
MVELECTRO	HRTI PRIVATE LIMITED	BUY	843	811
MVELECTRO	IMC INDIA SECURITIES PRIVATE LIMITED	SELL	169	817
MVELECTRO	IMC INDIA SECURITIES PRIVATE LIMITED	BUY	169	815
MVELECTRO	IRAGE BROKING SERVICES LLP	SELL	255	807
MVELECTRO	IRAGE BROKING SERVICES LLP	BUY	267	813
MVELECTRO	J4S FINANCIAL SOLUTIONS LLP	BUY	141	817
MVELECTRO	J4S FINANCIAL SOLUTIONS LLP	SELL	142	818
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	578	816
MVELECTRO	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	578	810
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1340	813
MVELECTRO	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1342	812
MVELECTRO	MATHISYS QUANTCAP LLP	SELL	283	810
MVELECTRO	MATHISYS QUANTCAP LLP	BUY	284	811
MVELECTRO	MICROCURVES TRADING PRIVATE LIMITED	BUY	1171	815
MVELECTRO	MICROCURVES TRADING PRIVATE LIMITED	SELL	1171	815
MVELECTRO	MUSIGMA SECURITIES	SELL	217	818
MVELECTRO	MUSIGMA SECURITIES	BUY	217	818
MVELECTRO	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	475	816
MVELECTRO	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	475	816
MVELECTRO	QE SECURITIES LLP	BUY	772	810
MVELECTRO	QE SECURITIES LLP	SELL	777	810
OPTIMYSTIX	AHINSA FINANCIAL SERVICES PVT.LTD.	BUY	259	149
OPTIMYSTIX	AHINSA FINANCIAL SERVICES PVT.LTD.	SELL	300	130
OPTIMYSTIX	NIKHIL VORA	BUY	200	130
OPTIMYSTIX	VIKASA INDIA EIF I FUND-INCUBE GLOBAL OPPORTUNIT	SELL	304	143
PCJEWELLER	HRTI PRIVATE LIMITED	SELL	141178	13
PCJEWELLER	HRTI PRIVATE LIMITED	BUY	154696	13
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	BUY	317223	13
PCJEWELLER	JUMP TRADING FINANCIAL INDIA PRIVATE LIMITED	SELL	317223	13
PCJEWELLER	QE SECURITIES LLP	BUY	84162	13
PCJEWELLER	QE SECURITIES LLP	SELL	85016	13
PRESSTONIC	HI GROWTH CORPORATE SERVICES PVT LTD	SELL	23	31
PRESSTONIC	HI GROWTH CORPORATE SERVICES PVT LTD	BUY	78	31
PRLIND	VINAY JAIPRAKASH AMBEKAR	BUY	235	43
RADHIKAJWE	ALPHAGREP SECURITIES PRIVATE LIMITED	BUY	2057	92
RADHIKAJWE	ALPHAGREP SECURITIES PRIVATE LIMITED	SELL	2057	92
RADHIKAJWE	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	1519	93
RADHIKAJWE	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	1522	93
RADHIKAJWE	MICROCURVES TRADING PRIVATE LIMITED	BUY	1298	93

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Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
RADHIKAJWE	MICROCURVES TRADING PRIVATE LIMITED	SELL	1298	93
RADHIKAJWE	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	594	93
RADHIKAJWE	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	594	93
RADHIKAJWE	QE SECURITIES LLP	BUY	1128	92
RADHIKAJWE	QE SECURITIES LLP	SELL	1129	92
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	SELL	659	311
RATNAVEER	ARIHANT CAPITAL MARKETS LIMITED	BUY	659	310
RIR	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	403	194
RIR	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	412	194
RPPINFRA	BASKARAN GANESAN ABIN DINESH	BUY	465	54
RPPINFRA	G VISALATCHI	BUY	463	54
RPPINFRA	YAGAVI N A *	SELL	831	54
SAVY	ANANT WEALTH CONSULTANTS PRIVATE LIMITED	SELL	58	145
SAVY	ANANT WEALTH CONSULTANTS PRIVATE LIMITED	BUY	108	147
SHANTI	ANURADHA BAJAJ	BUY	76	7
SHANTIGOLD	HRTI PRIVATE LIMITED	SELL	236	270
SHANTIGOLD	HRTI PRIVATE LIMITED	BUY	384	271
SHANTIINOR	ABHISHEK GARG	BUY	96	158
SHANTIINOR	BHANUBEN BHARATBHAI PATEL	BUY	122	158
SHANTIINOR	RR FAMILY TRUST	BUY	475	158
SILGO	BELA AGRAWAL	SELL	200	73
SILGO	NITIN JAIN	BUY	200	73
SKIPPER	PRAGYA MERCANTILE PVT LTD	SELL	720	600
SONUINFRA	KUNJIT MAHESHBHAI PATEL	BUY	95	47
SONUINFRA	THAKOR NAYANA CHANDUBHAI	SELL	68	47
SUMAX	MANSI SHARE AND STOCK BROKING PRIVATE LIMITED	BUY	176	111
SUMAX	NEXUS EQUITY GROWTH FUND SCH-1	BUY	96	111
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	SELL	361	482
SUNSHINE	ARIHANT CAPITAL MARKETS LIMITED	BUY	427	477
SUNSHINE	MATHISYS QUANTCAP LLP	SELL	159	479
SUNSHINE	MATHISYS QUANTCAP LLP	BUY	160	478
SUNSHINE	QE SECURITIES LLP	BUY	177	478
SUNSHINE	QE SECURITIES LLP	SELL	191	478
TECHNOCRAF	HRTI PRIVATE LIMITED	SELL	201	386
TECHNOCRAF	HRTI PRIVATE LIMITED	BUY	214	387
TEXMOPIPES	ANKITA VISHAL SHAH	SELL	26	55
TEXMOPIPES	ANKITA VISHAL SHAH	BUY	215	55
TEXMOPIPES	K RAJ BUSINESS VENTURE PRIVATE LIMITED	SELL	219	54
TEXMOPIPES	K RAJ BUSINESS VENTURE PRIVATE LIMITED	BUY	219	54
XTRANET	HRTI PRIVATE LIMITED	BUY	519	266
XTRANET	HRTI PRIVATE LIMITED	SELL	540	266
XTRANET	JUNOMONETA FINSOL PRIVATE LIMITED	SELL	736	268
XTRANET	JUNOMONETA FINSOL PRIVATE LIMITED	BUY	742	268
XTRANET	MICROCURVES TRADING PRIVATE LIMITED	BUY	445	267
XTRANET	MICROCURVES TRADING PRIVATE LIMITED	SELL	445	267

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Daily Updates

Bulk Deals

Security Name	Client Name	Buy / Sell	Qnty (in 000)	Price
XTRANET	NK SECURITIES RESEARCH PRIVATE LIMITED	BUY	580	268
XTRANET	NK SECURITIES RESEARCH PRIVATE LIMITED	SELL	581	268
XTRANET	QE SECURITIES LLP	SELL	685	266
XTRANET	QE SECURITIES LLP	BUY	688	271

Event Calendar – Corporate Action 8th Sep 2026

Company	Purpose
Century Extrusions Limited	Fund Raising
Ganga Forging Limited	Fund Raising/Other busine
GACM Technologies Limited	Other business matters
GACM Technologies Limited	Other business matters
HMA Agro Industries Limited	Other business matters
Knowledge Marine & Engineering Works Limited	Fund Raising
Knowledge Marine & Engineering Works Limited	Fund Raising
Melstar Information Technologies Limited	Fund Raising/Other business matters

Global Macro Events 8th Sep 2026

Event	Previous	Forecast
USA		
NFIB Business Optimism Index AUG	99.8	99.7
ADP Employment Change Weekly	11.75K	
Used Car Prices MoM AUG	-1.40%	
Used Car Prices YoY AUG	1.30%	
Consumer Inflation Expectations AUG	3.60%	3.60%
3-Month Bill Auction	3.77%	3.80%
6-Month Bill Auction	3.89%	
3-Year Note Auction	4.29%	
6-Week Bill Auction	3.74%	
Germany		
Balance of Trade JUL	€15.4B	€17.5B
Exports MoM JUL	0.90%	
Imports MoM JUL	4.40%	
10-Year Bund/g Auction	3.01%	
15-Year Bund/g Auction	3.31%	
Great Britain		
BRC Retail Sales Monitor YoY AUG	1%	1.20%
China		
Balance of Trade AUG	$112.5B	$120.0B
Exports YoY AUG	23.90%	
Imports YoY AUG	27.50%	
Balance of Trade Yuan AUG	CNY767.07B	

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Daily Updates

Nifty & Bank Spot – Pivot Levels 08/09/2026

	Closing	Support			Resistance		
		1	2	3	1	2	3
Nifty	23779.15	23714	23649	23561	23867	23955	24020
Bank Nifty	57088.30	56918	56748	56494	57342	57596	57766

Apollo Micro Systems Ltd - Pivot Levels 08/09/2026

Technical Stock Call	Action	Reco	Target	Support	SL
APOLLO	BUY	403.95	478	(394-385-374)	365

<u>Sector:</u> Capital Goods (INE713T01028)

<u>About:</u> Apollo Micro Systems Ltd. is a leading Indian defence and aerospace electronics company engaged in the design, development, manufacturing, and testing of mission-critical electronic and electro-mechanical systems. Established in 1985 and headquartered in Hyderabad, the company supplies advanced solutions to DRDO, ISRO, Indian Armed Forces, DPSUs, and global defence partners.

<u>View – Medium Term Bullish</u>

The stock commenced its downtrend from 466.50 (JUL 26).

Stock started trading below the averages & forming lower tops reached a low of 374 (JUL 26).

Later, buying emerged & the stock commenced its up move rallied to mark a high of 408.55 (AUG 26), thereafter, the stock entered into a consolidation zone trading between the range 408.55 – 374.35 (AUG 26_SEP 26), trading around the short term averages seeking trend direction.

Again, buying interest emerged at lower levels leading to a gradual recovery & recently, after forming higher bottoms, the stock has given a **Descending Triangle – Bullish Breakout** on the daily chart supported by volumes with a bullish candle reaching to a high of 407.40 (SEP 26), which is higher than the previous few weeks high.

Indicators like MACD, RSI & Aroon suggests positive crossover.

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Stock specific news

Solarworld Energy: Solar Cell Joint Venture
Approved a 50:50 venture with Rays Power to develop a 2.4 GW solar-cell plant at Mohasa, Madhya Pradesh.Solarworld proposes investing up to ₹100 crore, including an initial ₹26.82 crore subscription.It also proposes redirecting IPO proceeds from the earlier 1.2 GW Pandhurana project to this venture, subject to shareholder approval. Source

National Aluminium: Smelter Expansion Technology Agreement
Signed a technology-licensing agreement with Emirates Global Aluminium for its DX+ Ultra smelting technology.The technology will be used for the proposed 500,000 tonnes-per-year expansion at Anugola, Odisha.The expansion would take total aluminium capacity towards 1 million tonnes annually; EGA will supply designs, technical information and implementation support. Source

Swiggy: Logistics Business Share Swap
Agreed to sell 100% of Lynks Logistics to Trustroot Internet, after transferring Swiggy Networks' B2B distribution business into Lynks.Consideration comprises 166,534 preference shares at US$314.40 each; the transferred business generated ₹668 crore FY26 revenue, or 2.90% of Swiggy's consolidated revenue.Completion is expected by October 22, 2026, subject to closing conditions. Source

Tribhovandas Bhimji Zaveri: GRT Open Offer Terms
GRT Jewellers published an open offer for 1,72,70,845 shares, representing 25.88% of TBZ's voting capital.The offer price is ₹249.61 per share, taking maximum consideration to approximately ₹431.10 crore.The proposed tendering window is October 26–November 6, 2026; the transaction requires applicable approvals, including CCI and lender approvals. Source

PNB Housing Finance: ₹6,000 Crore Debt Approval
The board approved issuing up to ₹6,000 crore of non-convertible debentures through private placement.The securities may be issued in one or more tranches, within the ₹10,000 crore shareholder-approved borrowing issuance limit.Listing is proposed on NSE and/or BSE; coupon rates and maturities remain undecided until the respective allotments. Source

RBL Bank: Billion Dollar Funding Programme
Established a US$1 billion Euro Medium Term Note programme, following board approval on September 7.The programme permits future foreign-currency bond or note issuances in one or more transactions, subject to market conditions and regulatory compliance.The securities will not be offered to investors in India; establishment of the programme does not mean the full US$1 billion has been raised.

Tembo Global Industries: Ammunition Production Plant MoU
Subsidiary Tembo Classic Engineering signed an MoU with Lachaussee SA, Belgium, for an ammunition production line in India.The proposed project is valued at approximately €50 million, with capacity for 100 million rounds annually across two ammunition types.Equipment deliveries are scheduled for 2028 and 2029; this announcement concerns a proposed manufacturing investment under an MoU. Source

Vishnu Chemicals: Chromium Manufacturing Joint Venture
Signed a 50:50 joint-venture agreement with France's DCX Chrome SAS, a Delachaux Group subsidiary.The venture proposes a 6,000 tonnes-per-year high-purity chromium-metal plant at Visakhapatnam.DCX will provide technology access and Vishnu will supply raw materials; both partners will fund the venture equally and have equal board representation. Source

GMR Airports: ₹1,500 Crore Bond Redemption
Issued notices to voluntarily redeem two bond series carrying total principal of ₹1,500 crore.The announced redemption dates are September 26 for ₹1,100 crore and September 28 for ₹400 crore.Redemption may occur on or before those dates; the September 26 payment will follow the bond deed's non-business-day provisions. Source

Magellanic Cloud: Railway Surveillance Contract Secured
Subsidiary Provigil Surveillance received a ₹3.49 crore letter of acceptance from Western Railway's Ratlam Division.The project covers IP-based surveillance and CCTV systems across 38 railway stations.Provigil will supply, install, test and commission the telecom equipment required for these surveillance systems. Source

Molbio Diagnostics: Quarterly Profit Turns Positive
Q1 FY27 total income increased to ₹411.48 crore from ₹100.47 crore; net profit reached ₹52.74 crore, against a ₹23.94 crore loss a year earlier.Truenat test-kit sales increased to 6.24 million from 0.79 million, while device sales declined to 164 from 216.The quarter included approximately ₹57 crore of export orders deferred from Q4 FY26; EBITDA was ₹103.68 crore, with a 25.20% margin. Source

PVR INOX: ₹300 Crore Buyback Window
Published the offer document for buying back up to 20,68,965 shares at ₹1,450 each, for a maximum ₹300 crore.The tender period runs from September 10 to September 17, 2026, with eligibility based on the September 4 record date.Indicative entitlements are 9 shares for every 157 held for small shareholders and 21 for every 1,108 held for other eligible shareholders. Source

Pfizer: Minipress Exit Compensation Payment
Discontinued marketing, distribution and sales of Minipress XL from September 7, 2026.The withdrawal follows Pfizer Inc., USA's decision to stop manufacturing the product.Pfizer India will receive a US$13.9 million lump-sum payment, equivalent to approximately ₹131.38 crore, from its US parent. Source

VA Tech Wabag: Reliance Effluent Treatment Order
Secured a repeat order from Reliance Industries for an effluent-treatment plant at the Dhirubhai Ambani Green Energy Giga Complex, Jamnagar.The order falls within Wabag's ₹100–250 crore "medium" category and has a 13-month execution period.Work includes design, equipment supply, erection and commissioning of chemical/biological treatment systems and low-temperature sludge drying. Source

Maruti Suzuki: Selected Model Prices Rise
Announced price increases of up to ₹20,000 on selected models.The revised prices take effect from September 26, 2026.Maruti attributed the increase to sustained input-cost pressure and said it would pass on part of that burden; individual model-wise increases were not announced. Source

Arisinfra Solutions: Bengaluru Project Services Contract
Subsidiary ArisUnitern secured a services engagement from O2 Spaces, part of Vaishnavi Residences Group, for Morning Mist, Whitefield.The project has estimated ₹280 crore gross development value, with an estimated ₹100+ crore material-supply opportunity for Arisinfra; these figures are not contracted service revenue.

Morepen Laboratories: Reactor Capacity Expansion Completed
Completed the first phase of its manufacturing expansion ahead of the previously indicated schedule.Installed reactor capacity for API and contract development/manufacturing increased from 535 KL to 614 KL—an addition of 79 KL, approximately 14.8%.The added capacity will support the ongoing scale-up of commercial contract-manufacturing supplies alongside existing API production. Source

Max Healthcare: Kalinga Hospital Stake Increased
Kalinga Hospital allotted 50,21,212 equity shares to Max Healthcare through a rights issue.The allotment follows Max's approximately ₹87.87 crore investment, announced on September 3.Max's ownership increased from approximately 58.28% to 66.15%, with allotment confirmation received on September 7. Source

Anupam Rasayan: ₹60.88 Crore Tanfac Investment
Approved subscribing to 2,60,065 Tanfac Industries shares at ₹2,341 each, for ₹60.88 crore.The preferential subscription aims to increase Anupam's holding after dilution caused by Tanfac's qualified institutional placement.Allotment is tentatively scheduled for September 9, 2026; the subscribed shares represent approximately 0.73% of Tanfac's post-issue capital. Source

REC: Tokenised Bonds Rating Upgrade
Raised ₹500 crore through tokenised corporate bonds at a 7.30% annual coupon, with a one-year, nine-month tenure.Bids totalled ₹796 crore against the ₹100 crore base issue; pay-in, allotment and listing occurred on the same day under SEBI's pilot framework.Separately, Japan Credit Rating Agency upgraded REC from BBB+ to A−, retaining a Stable outlook. Bond issue, rating

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JSW Dulux: ₹48.59 Crore GST Notice

Received a Karnataka GST show-cause notice challenging input-tax credit for April 2022–March 2023.The ₹48.59 crore demand comprises approximately ₹27.11 crore tax, ₹18.76 crore interest and ₹2.71 crore penalty.The notice was received on September 7 and remains open to the company's submissions; it is not a final adjudicated demand. Source

Prism Johnson: ₹34.23 Crore Tax Relief

CESTAT New Delhi set aside ₹11.53 crore of excise demand, including ₹6.04 crore penalty, against the company and an ex-employee.Separately, the Commissioner (Appeals), Bhopal, overturned ₹22.70 crore of GST demand, including ₹11.35 crore penalty, against the company and employees.The two decisions remove combined demands of ₹34.23 crore; the excise ruling was pronounced on September 7 and the GST order was received that day. Excise, GST

BCPL Railway Infrastructure: ₹54.74 Crore Lowest Bid

Emerged as lowest bidder for Eastern Railway's Asansol Division project worth ₹54.74 crore, including GST.Work covers replacement of ageing catenary/contact wires and droppers on Durgapur–Sitarampur, and old structures on Panagarh–Waria.The contract has not yet been awarded; the execution period will be finalised after receipt of the letter of acceptance. Source

Container Corporation: ₹89.09 Crore Wagon Purchase

Placed an ₹89.09 crore order, including GST, with Eastern Railway's Jamalpur Locomotive Workshop, Munger.The purchase covers 12 rakes of BLSS wagons with BVCM brake vans.This is an equipment-procurement order placed by CONCOR, with the workshop identified as the domestic supplier. Source

Chalet Hotels: Goa Resort Acquisition Completed

Completed the acquisition of 100% of Lakeview Mercantile Company on September 7, 2026.Lakeview owns a land parcel at Bambolim, Goa, with potential for a roughly 170-room luxury resort.The share-purchase agreement has been executed, and Lakeview has become Chalet's wholly owned subsidiary. Source

63 Moons Technologies: ₹70 Crore Ticker Subscription

Overseas subsidiary Financial Technologies Singapore subscribed to 2,59,25,926 Ticker shares for ₹70 crore.The preferential allotment was completed on September 4, with confirmation disclosed on September 7.63 Moons reported its post-allotment holding in Ticker at 65.80%; Ticker recorded FY26 turnover of ₹27 lakh and a ₹35.82 crore net loss. Source

Shyam Metalics: August Sales Volumes Increase

August stainless-steel sales increased 16.44% year-on-year to 10,920 tonnes, with average realisation up 45.51% to ₹1,83,032 per tonne.Aluminium-foil sales rose 27.41% to 1,915 tonnes, while speciality-alloy volumes increased 27.97% to 19,002 tonnes.Carbon-steel long-product sales were 1,42,897 tonnes, up 2.76% year-on-year but down 7.02% from July. Source

ICICI Prudential Life: August Premium Growth Accelerates

August annualised premium equivalent reached ₹891 crore, up 23.4% year-on-year; retail APE increased 24.5% to ₹736 crore.New-business premium rose 10% to ₹1,953 crore, while new-business sum assured increased 57.9% to ₹1,37,710 crore.For April–August FY27, total APE reached ₹3,975 crore, up 16.4%, and new-business premium reached ₹9,120 crore, up 18.5%. Source

Unimech Aerospace: Dheya Engine Stake Increased

Acquired 850 additional Dheya Engineering Technologies shares for approximately ₹3 crore through a secondary purchase.The transaction added 5.08% ownership, taking Unimech's total holding to 35.07% on September 7.Dheya develops 20–400 kgf gas-turbine engines, primarily for UAVs, and has tested its 20, 40 and 50 kgf engines. Source

Shreeji Shipping Global: AMNS Coastal Vessel Charter

Signed a charter agreement with AMNS Shipping and Logistics for deployment of MV Sanghi Sudarshan along India's coastline.The approximately 4,400 DWT vessel, with a 4.5-metre draft, has been modified from clinker carriage to transport steel coils.Delivery is stipulated at APS Hazira; the vessel uses VLSFO fuel oil and has received the required strengthening and class certifications for the new cargo. Source

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Macro / Non-Stock News

Rebound Fades Into Close
Sensex recovered 362.57 points or 0.48% to 76,515.43, while Nifty gained only 24.25 points or 0.10% to 23,897.70, surrendering most intraday gains near 24,000. Both indices nevertheless lost about 1%-1.2% for the week, their fourth consecutive weekly decline, showing that Friday's move was stabilization rather than a confirmed reversal. Reuters, 4 Sep

Domestic Flows Offset Foreigners
FIIs sold a net ₹3,111.94 crore in cash equities on Friday, while DIIs bought a strong ₹8,930.12 crore, cushioning the benchmarks. Broader NSDL data showed FPIs withdrew ₹7,443 crore during 1–4 September, reversing July-August inflows as crude, U.S. yields and valuations encouraged profit-taking. Domestic institutions remain the market's principal downside buffer.

RBI Drains Liquidity Deluge
RBI absorbed ₹6.02 lakh crore through two three-day VRRR auctions as system surplus reached a record ₹10.3 lakh crore. The auctions cleared at 5.24%, but the weighted call rate remained at 4.94%, below the 5.25% repo rate. RBI also announced a ₹7-lakh-crore, 30-day VRRR for 7 September with an early-exit option—important for money-market yields and bank treasury positioning.

Bond Selloff Runs Longer
The benchmark 6.94% 2036 bond yield closed at 6.9625%, broadly unchanged Friday but up 5 bps for the week and 20 bps over three weeks. Abundant domestic liquidity supported shorter maturities, but expensive crude and the global yield shock prevented a broader rally. Banks, NBFCs, realty and other rate-sensitive sectors remain exposed to further yield repricing.

Rupee Gains Stronger Buffer
RBI dollar sales helped the rupee finish around ₹94.485 per dollar, nearly unchanged Friday but up 0.9% for its best week in five weeks. Forex reserves simultaneously climbed $11.48 billion to a record $740.80 billion, with total special-scheme mobilisation at approximately $136.37 billion. The enlarged buffer reduces disorderly-depreciation risk.

Payrolls Revive Fed Risk
U.S. payrolls rose 162,000 in August, almost three times the Reuters consensus of 56,000, while unemployment held at 4.1%. September Fed-hike probability briefly reached 65% before closing near 57%; the U.S. two-year yield ended around 4.37% and the 10-year near 4.78%. The S&P 500 fell 0.38%, Dow 0.51% and Nasdaq Gain by +0.21%, creating a weak opening cue for emerging markets and Indian IT.

Services Momentum Stays Soft
HSBC India Services PMI improved to 54.1 from 53.3, but remained below its 54.5 long-run average and was the second-weakest reading since March 2022. Hiring reached a 15-month high, while selling-price inflation accelerated to its fastest pace since March. The data supports consumption and employment, but softer-than-trend activity and firmer charges complicate the rates outlook.

State Capex Loses Speed
Capital expenditure by 20 large states rose 10.7% YoY to ₹1.79 lakh crore during April-July, less than half the previous year's 21.8% growth. UP capex fell 3.8%, MP 21.2%, Bihar 40.5% and West Bengal 52.9%, partly offset by Maharashtra's threefold increase. The slowdown is a near-term caution for construction, cement, capital goods and state-dependent infrastructure contractors.

Global Risk Appetite Frays
China's CSI300 and Shanghai Composite initially gained 0.4% Friday, and Hang Seng 2.1%, but CSI300 still headed for an approximately 1% weekly loss as the AI rally cooled. Europe's STOXX 600 added only 0.1% Friday and lost 0.8% weekly, with energy inflation raising expectations of an ECB hike. The mixed global picture offers little confirmation for a sustained Indian rebound.

Trade Opens, Tax Delays
The India-New Zealand FTA is expected to become operational in October, eliminating tariffs on 100% of Indian exports and carrying a $20-billion, 15-year investment commitment. India is also preparing trade discussions with China at the BRICS summit and progressing Chile/Mercosur negotiations.

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Disclosures and Disclaimer

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