DAILY MORNING REPORT

Monday, August 3, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bullish candle with increase in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 23756
- Crucial moving average of 20/50 SMA are at 24131 and 23903
- 200 SMA trend deciding level exist at 24778

Indian Equity Market Performance

Indian equities ended rose for a third straight session on Friday, even as overall gains remained capped as IT stocks faced selling pressure after recent gains following a rebound in global AI and semiconductor stocks.

Sectoral Front Performance

On the sectoral front, IT, Auto, Realty and Consumer Durables witnessed strong gains, while FMCG and Healthcare also ended higher. Defensive sectors underperformed, with Oil & Gas and PSU Banks trading largely subdued amid mixed global cues.

Technical Analysis

Nifty 50 extended its winning streak for a third straight session, reinforcing its higher high-higher low pattern and signalling improving market sentiment. The index closed above its 200-day EMA (24,370) for the first time since July 6, a key technical milestone that strengthens the medium-term outlook. Momentum indicators remained supportive. The RSI climbed to 59, while the MACD registered a bullish crossover, indicating strengthening buying momentum. Sustained trade above the 200-day EMA could propel the index towards the 24,500–24,600 resistance zone, with a decisive breakout paving the way for 24,800–25,000. On the downside, the 24,100–24,000 zone is expected to provide crucial support.

Option Activity

On the option front, maximum Put OI is at 24300 followed by 24200 strike, while maximum Call OI is at 24400 followed by 24500 strike. Call writing was seen at 24400 strike, followed by 24450 strike while Put writing was seen at 24400 strike, followed by 24350.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	52208	613.9	1.19
Nasdaq	25122	679.2	2.78
S&P 500	7438	121.5	1.66
FTSE 100	10897	-11.1	-0.10
DAX	25612	151.6	0.60
Hang Seng	25768	-91.4	-0.35
Nikkei	64579	2711.6	4.38
Sensex	77928	273.6	0.35
Nifty	24317	67.0	0.28

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,115.90	8.90	0.22
Silver ($/Oz)	58.43	0.64	1.11
Brent Crude ($/bl)	83.57	4.36	4.96
Dollar Index	100.02	0.30	0.30
USD/INR	95.54	-0.14	-0.14
USD/YEN	160.61	1.07	0.67
EUR/USD	1.15	0.00	-0.13

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	76830	77160	78094	78810	79470
Nifty	24000	24100	24383	24600	24800
Nifty (Fut)	24069	24169	24452	24669	24869

Pivot Level	
Sensex	77792
Nifty	24282

ECONOMY NEWS

Days after the US Senate cleared a new bill that would authorise President Donald Trump to impose tariffs of up to 100 per cent on India, China and other major buyers of Russian oil and gas, New Delhi on Friday said it was closely monitoring the situation. (BS)

The Union Cabinet chaired by Prime Minister (PM) Narendra Modi approved the national offshore exploration scheme, called “Samudra Manthan”. The Ministry of Petroleum & Natural Gas (MoPNG) will implement the ₹84,084 crore initiative, which is slated to run through 2030-31. (BS)

The prices of 19 kg commercial liquefied petroleum gas (LPG) cylinders have been reduced by up to ₹209 with effect from August 1, marking the second consecutive monthly price cut for commercial users. (BS)

Gross GST collections grew 15.4 per cent to over ₹2.11 trillion in July on higher mop-up from domestic transactions and imports. Gross GST collections were ₹1.83 trillion in July 2025. It was about ₹1.95 trillion last month. (BS)

The cross-border trade between India and China through Shipki La, known as the ancient silk route joining India with Tibet, resumed on Saturday after a gap of six years. Revenue and Horticulture Minister Jagat Singh Negi on Saturday flagged off 16 traders after presenting traditional Khataks (ceremonial scarves) along with their horses towards Shipki village in Tibet. (BS)

India's coal production grew 7.51 per cent to 69.75 million tonnes (mt) in July against 64.88 mt produced a year ago in July 2025, according to provisional data released by the Union Ministry of Coal on Sunday. Coal dispatch grew 17 per cent to 86.33 mt during the month compared to 73.57 mt dispatched in July last year. (BS)

The government has listed the Indian Statistical Institute Bill, 2026, and the Bankers' Books Evidence Bill, 2026, for introduction in the Lok Sabha on Monday. Once enacted, the Indian Statistical Institute Bill will replace the Indian Statistical Institute Act, 1959. The government is also likely to introduce the Taxation and Other Laws Amendment Bill, 2026, which will replace an ordinance. (BS)

Petrol and diesel sales by India's three state-run fuel retailers rose sharply in July as below-normal monsoon rainfall boosted fuel demand from farmers and motorists, preliminary industry sales data showed. (BS)

CORPORATE NEWS

Powerica has executed a Power Purchase Agreement (PPA) with Gujarat Urja Vikas Nigam (GUVNL) to set up a 100 MW wind power project in Gujarat at a tariff of Rs 3.435 per kWh for a period of 25 years.

Bharat Electronics (BEL) has secured additional orders worth Rs 847 crore since July 13. The major orders include electro-optics, a security operations centre, seekers, components, spares, and services.

Zydus Lifesciences has received the Establishment Inspection Report (EIR) from the US Food and Drug Administration (USFDA) for its injectable facility in Ahmedabad, with a Voluntary Action Indicated (VAI) classification. The GMP surveillance inspection was conducted from April 27 to May 5.

Dr Reddy's has received approval from the US Food and Drug Administration (FDA) for Rituximab, a biosimilar to Rituxan, for the US market. Rituximab is widely used to treat several B-cell malignancies, including non-Hodgkin lymphoma and chronic lymphocytic leukemia, as well as certain autoimmune conditions.

Lupin has received approval under the Federal Food, Drug, and Cosmetic Act (FD&C Act) for Diazepam Injection USP, 10 mg/2 mL (5 mg/mL), in single-dose prefilled syringes. The US FDA has approved Lupin's Diazepam Injection, which is bioequivalent to the reference listed drug (RLD), Valium Injection, manufactured by Hoffmann-La Roche Inc. It is indicated for the management of anxiety disorders or the short-term relief of anxiety symptoms.

Sterlite Technologies has received a multi-year supply agreement worth Rs 960 crore for the supply of fibre cables to a domestic telecom operator.

Marathon Nextgen's subsidiary, Sunset Spaces, has entered into a Joint Development Agreement (JDA) for a cluster redevelopment project in Sewri, Mumbai. The project involves the development of a high-rise residential tower with high-street retail spaces and has an estimated gross development value (GDV) of approximately Rs 450 crore for the company.

Afcons Infrastructure secured two projects worth nearly Rs 900 crore in July.

BULK DEALS

- **Rappid Valves (India) Ltd:** Aegis Investment Fund Sell 206400 Shares @ Rs. 330.04
- **Rappid Valves (India) Ltd:** Niveza Small Cap Fund Buy 202800 Shares @ Rs. 329.92
- **Rosstech:** Kotak Mahindra Mutual Fund Buy 1847117 Shares @ Rs. 900
- **Belding:** Sageone-Flagship Growth Oe Fund Buy 85000 Shares @ Rs. 1013.76
- **Gaudiumivf:** Carnelian India Multi Strategy Fund Sell 500000 Shares @ Rs. 137
- **Ssprl:** Vbcube Ventures Fund Ii Sell 207000 Shares @ Rs. 132.9
- **Ssprl:** Religo Commodities Ventures Fund Sell 179000 Shares @ Rs. 132.9
- **Sharvaya:** Pentateam Inventure Capital Scheme I Sell 103200 Shares @ Rs. 129.03
- **Takyon:** Innovative Vision Fund Sell 186000 Shares @ Rs. 19.94

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INSIDER TRADE

Acquisition

- * Sterlite Technologies Ltd: Pratik Praveen Agarwal, Promoter Group, Acquisition 93500 shares
- * Three M Paper Boards Ltd: HITENDRA DHANJI SHAH, Promoter and Director, Acquisition 2000 shares on 31-Jul-26
- * Sacheta Metals Ltd: PRANAV SATISHKUMAR SHAH, Promoter Group, Acquisition 10000 shares on 30-Jul-26

Disposal

- * Karur Vysya Bank Ltd: Promoter Group, Disposal 3000 shares
- * Olatech Solutions Ltd: NAVNEET KAKKAR, Promoter Group, Disposal 7400 shares on 28-Jul-26
- * Omax Autos Ltd: Ravinder Mehta, Promoter, Disposal 4500 shares on 29-Jul-26

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NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
BAJFINANCE	1141.2	8.3%	APTUS	260.5	-6.0%
HYUNDAI	2183.0	8.2%	SAPPHIRE	184.5	-5.5%
NETWEB	4510.0	7.5%	SAGILITY	43.5	-5.4%
CONCORDBIO	1419.9	6.8%	ACUTAAS	3087.0	-4.5%
BALKRISIND	2459.9	6.6%	APLAPOLLO	1808.0	-4.5%
BAJAJFINSV	2031.0	6.4%	CUB	206.0	-4.4%
JPPOWER	18.3	5.8%	ABDL	620.0	-4.4%
TORNTPHARM	5139.9	5.5%	DATAPATTNS	4270.9	-4.3%
THELEELA	493.0	5.3%	ONESOURCE	1617.0	-4.2%
HFCL	193.9	5.0%	PARADEEP	146.9	-4.2%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	19,885.80	17,625.43	2,260.37
FII	19,045.51	18,768.03	277.48

Category	31/07/2026	30/07/2026	29/07/2026	28/07/2026	27/07/2026	24/07/2026
DII	2,260.37	-1,864.03	998.02	1,664.16	2,329.14	5,453.55
FII	277.48	3,623.51	2,981.87	755.33	-1,688.23	-3,892.77

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DERIVATIVE REPORT

- Nifty gained by 0.27% with Nifty future shaded 5.01 lakh shares in open interest and stock
- Stock future added 632.1 Lakh shares in open interest.
- Nifty PCR increased to 1.38 from 1.25
- Total Nifty Calls added 264.3 lakh shares in open interest.
- Total Nifty Puts added 622.9 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for Aug. series is at 24000 and 24000 put.
- FII's bought net Rs. 277.48 Cr (provisional), while DIIs bought net Rs. 2,260.37 Cr in cash market
- FII bought net Rs. 4489.43 Cr in F&O
- Securities in Ban Period: - NIL

NIFTY TRACKER

	29.05.2026	27.05.2026	26.05.2026	25.05.2026
Spot	24383.60	24317.15	24250.20	23985.35
% Change in Spot	0.27%	0.28%	1.10%	-0.04%
Nifty(FUT) Aug.	24452.6	24358	24311.5	24098.8
Nifty(FUT) Aug. Vol.	35962	39685	51786	81000
Nifty(FUT) Aug. - OI	12620920	13179660	13311155	13571415
Nifty(FUT) Sept.	24567.5	24474.3	24431.1	0
Nifty(FUT) Sept. Vol.	2622	2157	3943	0
Nifty(FUT) Sept. - OI	1051310	1028560	997750	0

TRADE STATISTICS FOR 29.05.2026

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	11,64,138	80,33,305	-
Index Options	8,53,00,773	36,15,243	0.98
Stock Options	64,80,750	9,41,105	0.52
Index Futures	57,273	9,34,942	-
NSE F&O Total Turnover	9,30,02,934	1,35,24,595	0.94
NSE Cash Turnover		1,31,274.78	
BSE Cash Turnover		10,24,872.00	
Total Turnover	-	14680742	-

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FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	29/05/2026		27/05/2026		26/05/2026	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	2150	-1884	1300	-853	1711	-951
Index option	449	43916	-8408	23021	6896	41684
Stock Future	1947	1265	-237	-1969	3263	-246
Stock option	-57	5548	-177	5051	311	6449
Total	4489	48845	-7522	25250	12181	46936

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	29/05/2026	27/05/2026	26/05/2026	25/05/2026	22/05/2026
Index Futures	-1071	118	-18557	4055	-588
Index Options	3514	-412	-41597	4846	3263
Stock Futures	219108	149113	-909874	234176	100207
Stock Options	25483	29175	-180277	-15478	-23636
F&O Total	247035	177994	-1150304.97	227598.96	79246.22

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
BAJFINANCE	5,28,63,750	6,00,96,750	1146	8.30%	13.68%
GAIL	7,94,45,450	8,48,94,700	182.29	4.38%	6.86%
IDEA	5,87,94,62,025	5,88,40,36,425	13.07	0.93%	0.08%
CANBK	39,32,21,250	39,74,80,500	125.1	0.14%	1.08%
DELHIVERY	2,28,72,725	2,67,59,200	482.00	2.70%	16.99%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
SWIGGY	6,37,45,425	6,74,61,125	283.6	-3.61%	5.83%
LICHSGFIN	2,47,73,000	2,84,68,000	514.7	-3.32%	14.92%
HDFCBANK	29,39,35,200	29,75,40,100	751.60	-0.69%	1.23%
VMM	4,26,50,900	4,46,78,200	107.5	-0.89%	4.75%
ETERNAL	15,48,33,825	15,64,27,050	304.25	-2.58%	1.03%

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NIFTY OPTION OPEN INTEREST STATISTICS

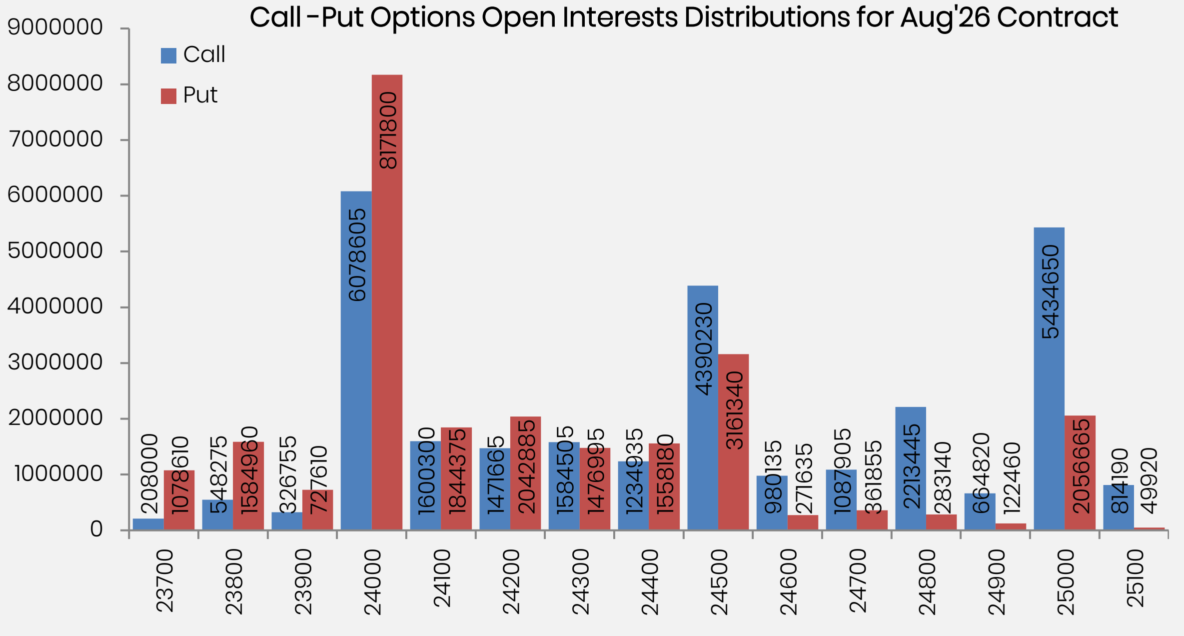
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
4-Aug-26	24400	PE	94.55	4963564	6086600	4537195
4-Aug-26	24350	PE	72.15	4982605	5786105	4520230
4-Aug-26	24300	PE	53.8	4693660	9853870	3898635
4-Aug-26	24000	PE	11.1	1756313	14686165	3755895
4-Aug-26	24400	CE	77.75	6794099	8327865	3481400
4-Aug-26	23000	PE	2	821482	10813075	3172455
4-Aug-26	23650	PE	4.3	571523	5418790	2899325
4-Aug-26	24250	PE	40.05	1907960	7333820	2679235
4-Aug-26	23950	PE	8.95	613630	5017805	2530255
4-Aug-26	25000	CE	1.55	1001992	10899850	2248350

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
4-Aug-26	24200	CE	213.4	1019573	3336515	-2499185
4-Aug-26	24250	CE	172.95	927714	1701440	-1725425
4-Aug-26	24300	CE	136.4	3566664	5001295	-1612390
4-Aug-26	23400	PE	2.9	619169	5672290	-1527240
4-Aug-26	24500	CE	37.05	4248839	9080110	-903890
4-Aug-26	24000	CE	392.9	115284	2222610	-537160
4-Aug-26	24100	CE	298.35	152044	1251770	-372385
4-Aug-26	21600	PE	0.8	107458	3709680	-303225
4-Aug-26	24150	CE	254.85	143158	558935	-301665
4-Aug-26	26100	CE	0.5	31618	224835	-257790

NIFTY OPTION OPEN INTEREST STATISTICS



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STOCK OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Interest	Change in OI
IDEA	25-Aug-26	14	CE	0.2	4144	341364600	43242375
IDEA	25-Aug-26	12	PE	0.15	1337	182118300	21085125
IDEA	25-Aug-26	13	CE	0.55	2683	231864900	11221575
GAIL	25-Aug-26	190	CE	2.45	12733	12961050	9638250
IDEA	25-Aug-26	13	PE	0.45	1346	194126100	6504225
GAIL	25-Aug-26	185	CE	3.95	12222	6571050	4899000
TATASTEEL	25-Aug-26	195	CE	2.55	11244	10846000	4801500
IDEA	25-Aug-26	17	CE	0.05	136	27303450	3788175
GAIL	25-Aug-26	180	PE	3.75	4613	4955800	3606800
GAIL	25-Aug-26	200	CE	0.9	5681	4199650	3532250

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	15	CE	0.1	4865	240441900	-41384025
CANBK	25-Aug-26	130	CE	1.95	3246	22018500	-6392250
IDEA	25-Aug-26	16	CE	0.05	1252	83125425	-4217025
PNB	25-Aug-26	120	CE	0.85	1257	8200000	-2600000
INOXWIND	25-Aug-26	80	CE	2.85	1941	8992000	-2329600
IDFCFIRSTB	25-Aug-26	90	CE	0.7	1533	33019000	-2021950
IRFC	25-Aug-26	110	CE	0.1	683	1367100	-1996400
ASHOKLEY	25-Aug-26	160	CE	9.6	4125	5255000	-1945000
RELIANCE	25-Aug-26	1300	CE	30.3	29802	8628500	-1785500
SUZLON	25-Aug-26	50	CE	1.1	1929	32067500	-1485900

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Krishna Kumar Agarwal

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