DAILY MORNING REPORT

Thursday, August 6, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Doji candle with increase in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 23688
- Crucial moving average of 20/50 SMA are at 24196 and 23956
- 200 SMA trend deciding level exist at 24769

Indian Equity Market Performance

Indian equity markets ended a choppy session flat to slightly lower on Wednesday even as a sharp fall in oil prices helped ease concerns around inflation and interest rates.

Sectoral Front Performance

On sectoral front, Banking, auto and capital goods stocks led the rally, while FMCG and select IT counters witnessed profit booking amid stock-specific weakness.

Technical Analysis

Nifty 50 remained range-bound and formed a small bearish candle with a long lower shadow on the daily chart, indicating buying interest at lower levels. Despite the consolidation, the broader trend remained positive, with the index trading comfortably above all key moving averages while holding above the 23.6% Fibonacci retracement level of the recent rally. The RSI stood at 62 and maintained a positive bias, while the MACD continued to trade above both the signal and zero lines, reflecting underlying strength in the market. As long as the index remains below the 24,700–24,800 resistance zone, a phase of consolidation is likely to continue. Immediate support is placed at 24,500–24,400, and a breach of this zone could intensify selling pressure. On the upside, a decisive breakout above 24,800 may open the door for a move towards the 25,000 mark. Easing crude oil prices, steady foreign fund inflows and lower volatility are expected to support sentiment in the near term.

Option Activity

On option front, maximum Put OI is at 24000 followed by 24500 strike, while maximum Call OI is at 24000 followed by 25000 strike. Call writing was seen at 24500 strike, followed by 24400 strike while Put writing was seen at 23000 strike, followed by 24400.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	54349	263.2	0.49
Nasdaq	26363	-221.6	-0.83
S&P 500	7724	-13.0	-0.17
FTSE 100	10888	8.9	0.08
DAX	26126	-76.1	-0.29
Hang Seng	25394	-521.8	-2.01
Nikkei	65139	-1161.4	-1.75
Sensex	78581	152.1	0.19
Nifty	24625	9.8	0.04

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,342.90	37.70	0.88
Silver ($/Oz)	62.39	0.10	0.16
Brent Crude ($/bl)	80.03	0.58	0.73
Dollar Index	99.54	-0.01	-0.01
USD/INR	95.09	-0.02	-0.03
USD/YEN	157.64	-0.11	-0.07
EUR/USD	1.16	0.00	0.01

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	77842	78172	78581	79162	79822
Nifty	24400	24500	24624	24800	25000
Nifty Fut	24424	24524	24648	24824	25024

Pivot Level	
Sensex	78641
Nifty	24600

ECONOMY NEWS

The government said foreign-owned retail ecommerce entities such as Amazon and Walmart-owned Flipkart will have to set up separate legal entities in India to export Indian manufactured products through the inventory model. (BS)

India's foreign exchange reserves rose to a near three-month high of $692.9 billion as of July 31, data from the Reserve Bank of India showed. (BS)

Indian economy is set to cross USD 5-trillion mark in FY29 as per the IMF and the government has adopted a broad-based growth strategy to achieve the milestone, Finance Minister Nirmala Sitharaman said in the Rajya Sabha. (BS)

The HSBC India Services PM), compiled by S&P Global, fell to 53.3 in July from 57.4 in June. The July reading was the lowest since February 2022, when the index stood at 51.8. (BS)

Deficits reported by seven Indian states for 2024-25 understate the true gap in their finances, according to the Comptroller and Auditor General's State Finances Audit Reports tabled during the Monsoon Session of Parliament. (BS)

Eight coal gasification projects approved under the Centre's ₹8,500-crore Scheme for Promotion of Coal and Lignite Gasification Projects are expected to attract investments of about ₹65,365 crore and gasify around 12 million tonnes of coal annually, Minister of State for Coal and Mines Satish Chandra Dubey informed Parliament. (BS)

The National Highways Authority of India (NHAI) suspended toll collection on the Kanpur-Lucknow Expressway until repairs to a damaged stretch are completed, and initiated disciplinary action against the concessionaire, the engineer and several officials over alleged lapses in project execution and supervision. (BS)

India may impose a charge on cooking gas and natural gas consumers to help fund a planned $42 billion strategic fuel reserve, according to two sources with direct knowledge of the matter, after disruptions from the Iran war exposed supply chain vulnerabilities. (BS)

An e-commerce company with foreign investment that seeks to undertake inventory-based operations exclusively for exports can procure goods only against confirmed export orders, as speculative stockpiling for outbound shipments is not permitted. (BS)

CORPORATE NEWS

Infosys announced a significant expansion of its long-standing collaboration with Metsä Group, a globally operating forest industry company based in Finland. Under this multi-year engagement, Infosys will support the transformation of Metsä Group's IT landscape towards a more efficient, unified, and AI-ready operating model, while delivering end-to-end IT services across the company's global operations.

Gland Pharma and Neuland Lab have announced a long-term strategic contract development and manufacturing partnership to expand sterile API production. The collaboration combines Neuland's complex API development and manufacturing capabilities, including expertise in complex chemistry, process development and custom manufacturing, with Gland Pharma's global sterile manufacturing expertise.

USFDA has issued a warning letter to Dabur India citing significant violations of current good manufacturing practices at its pharmaceutical manufacturing facility in Silvassa.

USFDA conducted an inspection of Cohance Lifesciences' manufacturing facility in Pashamylaram, Hyderabad. Following the inspection, the company received a Form FDA 483 containing five observations. None of the observations relate to data integrity issues.

Vodafone Idea will focus on three priorities in FY27 — executing its network investment programme, strengthening market competitiveness and driving growth in customers and earnings, said Kumar Mangalam Birla, the chairman of the Aditya Birla group, in FY26's annual report.

Ola Electric Mobility had announced its partnership with Axis Energy to deploy up to 20 gigawatt-hour battery energy storage systems by 2032, including a ramp-up to 5 GWh annually from 2028.

RMC Switchgears has received orders aggregating Rs 344.10 crore. The largest among them comprises 12 Letters of Acceptance (LoAs) from Paschim Gujarat Vij Company (PGVCL), worth Rs 333.80 crore.

NBCC (India) bagged orders worth ₹801.20 crore, including one from the Reserve Bank of India (RBI) for construction of an office complex Nelapadu, Amaravati, Andhra Pradesh, and residential complex at Inavolu, Amaravati, Andhra Pradesh.

BULK DEALS

- **Sapphire Foods India Ltd:** Pioneer Investment Fund Scheme Ii Sell 1700000 Shares @ Rs. 200
- **Sapphire Foods India Ltd:** Pi Opportunities Aif V Llp Sell 1657465 Shares @ Rs. 200.1
- **Rajgor Castor Derivati L:** Unicorn Fund Sell 480000 Shares @ Rs. 32.8
- **Invicta Diagnostic Ltd:** Birchwood Multi Stgy Fnd Openended Pcc Ltd - Birchwood Global Alpha Fund Buy 193600 Shares @ Rs. 73.79
- **Invicta Diagnostic Ltd:** Pine Oak Global Fund Sell 193600 Shares @ Rs. 73.79
- **Ganga Forging Limited:** Pine Oak Global Fund Sell 6700000 Shares @ Rs. 1.95
- **Silky Overseas Limited:** Birchwood Multi Stgy Fnd Openended Pcc Ltd - Birchwood Global Alpha Fund Buy 166400 Shares @ Rs. 72.26
- **Silky Overseas Limited:** Pine Oak Global Fund Sell 166400 Shares @ Rs. 72.26
- **Tembo Global Ind Ltd:** Cullinan Opprts Fund Vcc-Cullinan Opportunities Incorporated Vcc Sub Fund 1 Sell 105229 Shares @ Rs. 66.16
- **Indigrid:** Government Of Singapore Sell 28735632 Shares @ Rs. 174.03
- **Indigrid:** New Pension System (Nps) Trust Buy 5747126 Shares @ Rs. 174
- **Meeind:** Alchemy Long Term Ventures Fund,Series 3 Buy 115000 Shares @ Rs. 396.65
- **Hrhygiene:** Necta Bloom Vcc - Regal Fund Sell 372800 Shares @ Rs. 88.71
- **Hrhygiene:** Nova Global Opportunities Fund Pcc - Touchstone Sell 140800 Shares @ Rs. 90
- **Hrhygiene:** Arnesta Global Opportunities Fund Pcc - Arnesta Global Fund 1 Sell 121600 Shares @ Rs. 90

INSIDER TRADE

Acquisition

- * Gamco Ltd: RASHI GOENKA, Promoter Group, Acquisition 10092 shares on 31-Jul-26
- * Vst Tillers Tractors Ltd-$: S Mahalakshmi, Promoter, Acquisition 460848 shares on 04-Aug-26

Disposal

- * Kaiser Corporation Ltd: Pask Holdings Private Limited, Promoter, Disposal 1584820 shares on 03-Aug-26
- * Sterlite Technologies Ltd: Navin Agarwal, Promoter Group, Disposal 5000 shares on 04-Aug-26

DAILY MORNING REPORT

Thursday, August 6, 2026

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
HINDCOPPER	533.3	8.3%	MAPMYINDIA	1,049.0	-8.0%
OLAELEC	41.5	7.6%	GSPL	268.4	-7.1%
ENGINERSIN	240.2	6.8%	ZEEL	94.2	-5.4%
GODIGIT	280.2	6.4%	BHARTIHEXA	1,546.0	-4.4%
RRKABEL	2,807.0	6.3%	AEGISVOPAK	284.0	-4.1%
HINDZINC	596.7	6.0%	JBCHEPHARM	2,408.9	-3.9%
NIACL	181.9	5.9%	GLAXO	2,545.0	-3.9%
TENNIND	581.5	5.6%	SONATSOFTW	337.0	-3.8%
JUBLFOOD	488.0	4.9%	KALYANKJIL	569.0	-3.8%
IPCALAB	1,778.0	4.9%	BALRAMCHIN	634.9	-3.6%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	19,353.43	16,470.26	2,883.17
FII	15,940.50	16,883.92	-943.42

Category	05-Aug-26	04-Aug-26	03-Aug-26	31-Jul-26	30-Jul-26	29-Jul-26
DII	2,883.17	-936.14	1,571.18	277.48	3,623.51	2,981.87
FII	-943.42	2,446.47	922.26	2,260.37	-1,864.03	998.02

DAILY MORNING REPORT

Thursday, August 6, 2026

DERIVATIVE REPORT

- Nifty gained by 0.04% with Nifty future added 6.13 lakh shares in open interest and stock
- Stock future added 715.7 Lakh shares in open interest.
- Nifty PCR decreased to 0.90 from 0.99
- Total Nifty Calls shaded 830.5 lakh shares in open interest.
- Total Nifty Puts shaded 1029.8 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 24000 and 24000 put.
- FII's sold net Rs. 943.42 Cr (provisional), while DIIs bought net Rs. 2,883.17 Cr in cash market
- FII sold net Rs. 14436.10 Cr in F&O
- Securities in Ban Period: - LICI

NIFTY TRACKER

	05-Aug-26	04-Aug-26	03-Aug-26	31-Jul-26
Spot	24,624.7	24,614.9	24,774.3	24,383.6
% Change in Spot	0.04%	-0.64%	1.60%	0.27%
Nifty(FUT) Aug.	24647.7	24555.6	24649.4	24452.6
Nifty(FUT) Aug. Vol.	45395	63185	49063	35962
Nifty(FUT) Aug. - OI	12297220	11783590	11896885	12620920
Nifty(FUT) Sept.	24770.0	24683.5	24760.0	24567.5
Nifty(FUT) Sept. Vol.	4810	3985	4428	2622
Nifty(FUT) Sept. - OI	1228890	1155895	1118975	1051310

TRADE STATISTICS FOR 05-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	9,93,442	69,77,409	-
Index Options	5,82,21,041	35,04,564	1.13
Stock Options	59,64,631	8,26,331	0.49
Index Futures	76,496	12,61,688	-
NSE F&O Total Turnover	6,52,55,610	1,25,69,992	1.05
NSE Cash Turnover	-	1,31,134	-
BSE Cash Turnover	-	11,19,202	-
Total Turnover	-	1,38,20,328	-

DAILY MORNING REPORT

Thursday, August 6, 2026

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	05-Aug-26		04-Aug-26		03-Aug-26	
	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest	Net Buying /Selling	Change In Open interest
Index Future	-823	859	-500	110	3,618	-2,733
Index option	-13,683	33,264	18,345	-1,08,813	5,814	46,362
Stock Future	48	3,140	-1,169	-444	-307	3,094
Stock option	22	7,788	267	-43,06,953	-184	43,16,751
Total	**-14,436**	**45,051**	**16,943**	**-44,16,101**	**8,941**	**43,63,474**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	05-Aug-26	04-Aug-26	03-Aug-26	31-Jul-26	30-Jul-26
Index Futures	1,890	143	-1,188	-1,071	118
Index Options	6,015	2,003	4,628	3,514	-412
Stock Futures	-4,44,486	37,362	1,68,195	2,19,108	1,49,113
Stock Options	24,186	18,693	23,565	25,483	29,175
F&O Total	**-4,12,395**	**58,201**	**1,95,200**	**2,47,035**	**1,77,994**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
TATASTEEL	17,00,02,250	17,62,91,500	193.1	0.80%	3.70%
NMDC	34,46,82,000	35,03,38,500	85.9	1.36%	1.64%
NTPC	9,84,93,000	10,27,75,500	350.1	1.79%	4.35%
MOTHERSON	12,70,89,750	13,13,64,000	155.9	3.46%	3.36%
KOTAKBANK	17,27,40,000	17,66,56,000	398.0	0.84%	2.27%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
HDFCBANK	30,01,45,300	31,34,67,700	739.7	-0.54%	4.44%
RELIANCE	10,33,38,000	10,94,36,000	1,284.3	-1.01%	5.90%
ONGC	5,45,10,750	5,95,12,500	239.1	-1.13%	9.18%
NYKAA	4,59,56,250	5,03,28,125	335.6	-0.70%	9.51%
IDFCFIRSTB	35,52,60,325	35,95,08,275	84.8	-0.82%	1.20%

DAILY MORNING REPORT

Thursday, August 6, 2026

NIFTY OPTION OPEN INTEREST STATISTICS

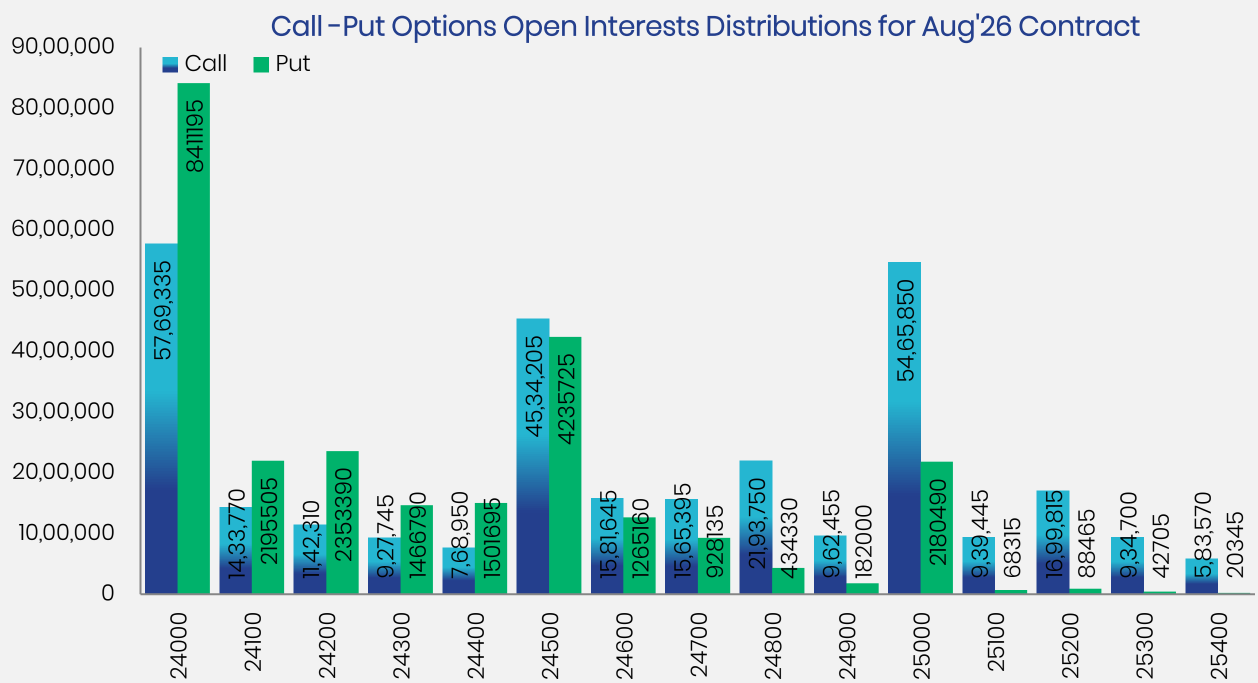
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
11-Aug-26	26,000	CE	1.05	4,23,346	86,27,515	32,19,580
11-Aug-26	24,700	CE	98.35	24,23,582	74,08,505	27,29,740
11-Aug-26	25,700	CE	1.75	3,61,712	45,31,280	25,92,980
11-Aug-26	25,000	CE	25.70	14,60,738	88,10,945	25,92,850
11-Aug-26	24,650	CE	120.05	20,28,090	45,26,210	23,03,925
11-Aug-26	24,200	PE	24.60	11,56,619	53,17,975	22,13,965
11-Aug-26	25,900	CE	1.15	2,37,230	37,81,960	22,12,210
11-Aug-26	25,800	CE	1.35	3,09,419	47,46,690	22,08,765
11-Aug-26	24,900	CE	40.80	10,02,079	61,92,095	21,32,390
11-Aug-26	25,400	CE	4.65	4,59,722	37,19,365	21,14,320

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
11-Aug-26	22,000	PE	1.05	59,948	17,28,090	-5,61,860
11-Aug-26	24,500	CE	200.40	14,04,486	42,00,170	-5,22,210
11-Aug-26	24,450	CE	232.90	2,12,022	5,98,650	-3,70,435
11-Aug-26	21,600	PE	0.85	75,465	34,65,930	-3,70,435
30-Mar-27	25,500	CE	942.00	8,914	6,72,425	-3,29,875
25-Aug-26	24,500	CE	334.05	86,081	45,34,205	-3,24,350
25-Aug-26	24,400	CE	400.25	15,010	7,68,950	-2,28,995
25-Aug-26	23,000	PE	10.80	30,502	29,62,895	-2,26,980
18-Aug-26	25,650	CE	7.10	14,678	1,00,165	-2,18,335
25-Aug-26	24,400	PE	150.70	32,547	15,01,695	-1,31,430

NIFTY OPTION OPEN INTEREST STATISTICS



DAILY MORNING REPORT

Thursday, August 6, 2026

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	0.13	3,651	38,03,89,950	2,49,44,775
IDFCFIRSTB	25-Aug-26	90	CE	0.57	1,648	3,73,59,700	55,55,725
HDFCBANK	25-Aug-26	740	CE	15.95	34,212	1,20,70,500	51,10,300
NHPC	25-Aug-26	76	PE	0.92	1,449	77,14,500	49,20,600
NHPC	25-Aug-26	74	PE	0.43	1,033	56,29,500	47,67,700
HDFCBANK	25-Aug-26	750	CE	11.75	30,973	2,11,58,150	41,63,900
NMDC	25-Aug-26	90	CE	1.14	1,840	1,55,79,000	37,53,000
NHPC	25-Aug-26	80	CE	1.31	2,776	1,02,37,350	37,18,250
YESBANK	25-Aug-26	23	CE	0.56	1,475	7,51,06,500	34,83,200
NHPC	25-Aug-26	85	CE	0.40	2,364	92,01,800	30,30,200

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	13	PE	0.53	1,247	18,35,47,800	-2,07,27,750
IDEA	25-Aug-26	13	CE	0.41	1,951	24,66,60,225	-79,33,725
IDEA	25-Aug-26	15	PE	2.16	96	9,54,90,600	-30,73,425
CANBK	25-Aug-26	130	CE	3.06	4,377	1,80,69,750	-30,03,750
ASHOKLEY	25-Aug-26	163	CE	14.85	542	9,60,000	-18,70,000
YESBANK	25-Aug-26	24	CE	0.24	1,396	6,42,83,700	-18,34,900
TATASTEEL	25-Aug-26	190	CE	6.25	5,706	1,21,77,000	-17,95,750
IDEA	25-Aug-26	14	PE	1.24	172	11,35,02,300	-14,29,500
VEDL	25-Aug-26	270	CE	13.70	9,635	30,57,850	-13,07,550
LICI	25-Aug-26	400	CE	7.05	2,289	76,86,000	-12,79,600

DAILY MORNING REPORT

Thursday, August 6, 2026

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Krishna Kumar Agarwal

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Date: 2026.08.06 08:58:09 +05'30'

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