ashika

DAILY MORNING REPORT

Friday, August 7, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Doji candle with decrease in volume
- Buy crossover in oscillators
- Lower band of Bollinger exist at 23700
- Crucial moving average of 20/50 SMA are at 24229 and 23970
- 200 SMA trend deciding level exist at 24767

Indian Equity Market Performance

Indian equity markets ended Thursday's session with modest gains, with a weaker dollar and lower yields on the back of softer U.S. labor market data, and hopes for a U.S.-Iran deal to reopen the Strait of Hormuz helping underpin sentiment.

Sectoral Front Performance

On sectoral front, Nifty PSU Bank emerged as the top gainer, rising 2.2%, followed by Nifty Oil & Gas, which advanced 0.8%. On the downside, Nifty Media was the worst performer, falling 1.3%, while Nifty Realty declined 1.3%. Nifty Auto and Nifty Metal also ended lower, shedding 1% each, respectively, while Nifty IT slipped 0.9%

Technical Analysis

Nifty 50 ended on a cautious note, forming a Doji candlestick on the daily chart, signalling indecision among market participants. Momentum indicators also pointed to a range-bound trend, although the broader market structure remained positive as the index continued to trade above all major moving averages. The RSI remained steady near the 62 mark, while the MACD maintained its upward trajectory, reflecting an underlying bullish bias. One can expect the index to remain in a consolidation phase as long as it stays below the 24,700-24,800 resistance zone. Immediate support is seen in the 24,500-24,400 range, while a decisive move above 24,800 could pave the way for a rally towards the 25,000 mark. Falling crude oil prices, sustained foreign fund inflows and lower market volatility are expected to lend support to sentiment.

Option Activity

On option front, maximum Put OI is at 24600 followed by 24000 strike, while maximum Call OI is at 24700 followed by 25000 strike. Call writing was seen at 24700 strike, followed by 24900 strike while Put writing was seen at 24600 strike, followed by 24650.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53885	-464.0	-0.85
Nasdaq	26348	-15.1	-0.06
S&P 500	7710	-13.6	-0.18
FTSE 100	10868	-20.4	-0.19
DAX	26140	13.8	0.05
Hang Seng	25494	-36.3	-0.14
Nikkei	64961	-722.3	-1.10
Sensex	78955	373.8	0.48
Nifty	24636	11.4	0.05

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,317.90	18.30	0.43
Silver ($/Oz)	62.39	0.78	1.26
Brent Crude ($/bl)	83.44	0.95	1.15
Dollar Index	99.84	0.03	0.03
USD/INR	95.45	0.30	0.32
USD/YEN	158.35	-0.08	-0.05
EUR/USD	1.15	0.00	-0.03

Support/Resistance levels for Indian Equity Indices					
	S2	S1	CMP	R1	R2
Sensex	78175	78505	78954	79495	80155
Nifty	24400	24500	24636	24800	25000
Nifty Fut	24503	24603	24739	24903	25103

Pivot Level	
Sensex	78848
Nifty	24639

ECONOMY NEWS

Consumer confidence weakened across both urban and rural India in July, with households becoming more cautious about the current economic situation, employment prospects and inflation, according to the Reserve Bank of India's (RBIs) latest consumer confidence surveys. (BS)

The Uttar Pradesh Industrial Development Authority (UPSIDA) has approved the layout plans for two industrial areas in Fatehpur and Ayodhya districts. This decision by the nodal agency aims to catalyse planned industrial development, systematic land use, faster plot allotment, and scale up infrastructure for encouraging new investments, while establishing the state as an industrial hub. (BS)

India's coal supply position for the power sector remains comfortable, with total available coal stocks sufficient to meet around 62 days of consumption, the Coal Ministry said, as production and despatch registered healthy growth during July. (BS)

The government said no concessions or commitments relating to the import of ethanol for fuel blending from the US have been made in the India-US trade pact discussions. (BS)

The government will continue its rationalising tariffs in the Budget for FY28 and aims to lower the Customs duty on most items to a single-digit rate, Finance Minister Nirmala Sitharaman said.

The Parliamentary Standing Committee on Commerce has urged the government to conclude the proposed India-United States Bilateral Trade Agreement (BTA) at the earliest while ensuring that India's interests are adequately protected. (BS)

The Ministry of Labour and Employment told Parliament on Thursday that the Centre has not carried out any dedicated assessment or compliance audit of the mandatory crèche provision at workplaces, nearly nine years after it was introduced under the amended Maternity Benefit Act. The provision was later subsumed under the Code on Social Security, 2020. (BS)

The Union Cabinet approved the development of Guwahati-Tezpur corridor on National Highway-15 in Assam with a total outlay of ₹8,970.20 crore. The 135.87-km, four-lane access-controlled corridor project will be implemented on a Build-Operate-Transfer (BOT)-Toll basis under the National Highways (Original) programme. (BS)

CORPORATE NEWS

RBI released its latest list of Upper Layer Non-Banking Financial Companies (NBFC-UL), adding four state-owned lenders to the category that is subject to enhanced regulatory oversight under the central bank's scale-based regulation framework. The new entrants are REC, PFC, IRFC and HUDCO.

IndusInd Bank has laid out a three-year roadmap for FY27-FY29, with the first year focused on restoring the franchise to industry-aligned growth and stability, followed by a calibrated scale-up in the second year and an ambition to outperform the industry in the third, as the private sector lender looks to move beyond a year of rebuilding its balance sheet and governance framework.

Bharti Airtel's data center subsidiary, Nxtra Data, has signed agreements to acquire up to an 85% stake each in Rochak Systems and Rovision Tech Hub to facilitate Nxtra's long-term hyperscaler infrastructure expansion.

Biocon expects business momentum to strengthen in H2FY27, banking on a series of recent product launches in its primary US market, as the company looks to build on the strong start to FY27.

HCLTech has been named an OpenAI Advanced Partner. The partnership with OpenAI will help enterprises build, deploy and scale AI solutions. As part of the collaboration, the company will expand its AI offerings using GPT-5.6, ChatGPT Work and its AI-powered service transformation platform, AI Force.

Coal India has emerged as the 'preferred' bidder for the Gadadharpur iron ore block in Odisha's Kendujhar district, marking the state-owned miner's entry into the sector as it looks to diversify its operations.

CESC said its subsidiary, Purvah Green Power, has received a Letter of Award (LOA) from the Solar Energy Corporation of India Ltd (SECI) for setting up a 175 megawatt (MW) interstate transmission system (ISTS)-connected wind power project.

Alkem Laboratories has said its manufacturing facility located at Amaliya, Daman, has been classified as Official Action Indicated (OAI) by US FDA. The company received a Form FDA 483 containing seven observations.

BULK DEALS

- **Indegene Limited:** Bpc Genesis Fund I Spv Limited Sell 13862223 Shares @ Rs. 525
- **Creditaccess Grameen Ltd:** Creditaccess India B.V. Sell 3657500 Shares @ Rs. 1482
- **Indegene Limited:** Quant Mutual Fund Buy 9523810 Shares @ Rs. 525
- **Indegene Limited:** Bpc Genesis Fund I-A Spv Limited Sell 7190255 Shares @ Rs. 525
- **Indegene Limited:** Icici Prudential Mutual Fund Buy 6767239 Shares @ Rs. 525
- **Neuland Laboratories Ltd:** Hdfc Mutual Fund Buy 64547 Shares @ Rs. 21585
- **Orient Electric Limited:** Nippon India Mutual Fund Buy 1250000 Shares @ Rs. 178
- **Bafna Pharmaceuticals Ltd:** Cullinan Opprts Fund Vcc-Cullinan Opportunities Incorporated Vcc Sub Fund 1 Buy 666000 Shares @ Rs. 284.55
- **Bafna Pharmaceuticals Ltd:** M7 Global Fund Pcc-Aerion Sell 666000 Shares @ Rs. 284.55
- **Aqylon Nexus Limited:** Pine Oak Global Fund - Class B Buy 2430000 Shares @ Rs. 28
- **Tembo Global Ind Ltd:** Cullinan Opprts Fund Vcc-Cullinan Opportunities Incorporated Vcc Sub Fund 1 Buy 200000 Shares @ Rs. 63.75
- **Shadowfax:** Newquest Asia Fund Iv (Singapore) Pte. Limited. Sell 12500000 Shares @ Rs. 240.46
- **Kpittech:** Massachusetts Institute Of Technology Sell 2750000 Shares @ Rs. 630
- **Shadowfax:** Oxbow Master Fund Limited Buy 6932362 Shares @ Rs. 240.25
- **Clean:** Sundaram Mutual Fund Buy 788457 Shares @ Rs. 770
- **Orientelec:** Nippon India Mutual Fund Buy 1250000 Shares @ Rs. 178
- **Dhaval:** Stellar Growth Fund Vcc-Silver Capital Management Incorporated Vcc Sub-Fund Buy 91200 Shares @ Rs. 110

INSIDER TRADE

Acquisition

- * Prataap Snacks Ltd: Authum Investment & Infrastructure Limited, Promoter, Acquisition 217598 shares on 05-Aug-26
- * Three M Paper Boards Ltd: RUSHABH HITENDRA SHAH, Promoter and Director, Acquisition 4000 shares on 06-Aug-26
- * Steel Exchange India Ltd: Suresh Kumar Bandi, Promoter and Director, Acquisition 4331500 shares on 05-Aug-26

Disposal

- * Kaiser Corporation Ltd: Promoter, Disposal 1631546 shares on 05-Aug-26
- * Dr. Lal Pathlabs Ltd: Hony Brig Dr Arvind Lal, Promoter and Director, Disposal 320000 shares on 03-Aug-26
- * Steel Exchange India Ltd: Late Suguna Bandi, Promoter Group, Disposal 4331500 shares on 05-Aug-26
- * Omax Autos Ltd: Ravinder Kumar Mehta, Promoter, Disposal 20000 shares on 31-Jul-26

NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
NAVINFLUOR	8,619.0	13.3%	FSL	295.0	-13.1%
NEULANDLAB	21,600.0	8.2%	GSPL	268.4	-7.1%
TATATECH	804.6	6.7%	IKS	1,765.0	-6.0%
MAZDOCK	2,531.0	6.3%	BLUESTARCO	1,571.0	-5.6%
HAL	4,934.0	6.2%	SAREGAMA	528.9	-5.1%
PINELABS	156.4	5.8%	CEMPRO	1,245.0	-4.1%
KALYANKJIL	598.0	5.0%	BIKAJI	624.3	-4.0%
BDL	1,299.0	4.8%	POWERGRID	270.8	-3.9%
COCHINSHIP	1,491.4	4.7%	HFCL	204.0	-3.9%
AIIL	595.1	4.3%	JBCHEPHARM	2,408.9	-3.9%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	19,723.68	15,710.08	4,013.60
FII	16,161.35	16,179.21	-17.86

Category	06-Aug-26	05-Aug-26	04-Aug-26	03-Aug-26	31-Jul-26	30-Jul-26
DII	4,013.60	2,883.17	-936.14	1,571.18	277.48	3,623.51
FII	-17.86	-943.42	2,446.47	922.26	2,260.37	-1,864.03

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DERIVATIVE REPORT

- Nifty gained by 0.05% with Nifty future shaded 4.76 lakh shares in open interest and stock
- Stock future added 542.3 Lakh shares in open interest.
- Nifty PCR decreased to 1.04 from 0.90
- Total Nifty Calls added 1.7 lakh shares in open interest.
- Total Nifty Puts added 307.9 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. 17.86 Cr (provisional), while DIIs bought net Rs. 4,013.60 Cr in cash market
- FII bought net Rs. 1090.74 Cr in F&O
- Securities in Ban Period: - BANDHANBANK, LICI

NIFTY TRACKER

	06-Aug-26	05-Aug-26	04-Aug-26	03-Aug-26
Spot	24,636.0	24,624.7	24,614.9	24,774.3
% Change in Spot	0.05%	0.04%	-0.64%	1.60%
Nifty(FUT) Aug.	24739.4	24647.7	24555.6	24649.4
Nifty(FUT) Aug. Vol.	31485	45395	63185	49063
Nifty(FUT) Aug. - OI	11833120	12297220	11783590	11896885
Nifty(FUT) Sept.	24861.4	24770.0	24683.5	24760.0
Nifty(FUT) Sept. Vol.	2220	4810	3985	4428
Nifty(FUT) Sept. - OI	1217385	1228890	1155895	1118975

TRADE STATISTICS FOR 06-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	10,22,745	71,79,961	-
Index Options	4,28,49,677	25,19,772	1.00
Stock Options	65,67,593	8,77,334	0.49
Index Futures	58,611	9,75,190	-
NSE F&O Total Turnover	5,04,98,626	1,15,52,257	0.92
NSE Cash Turnover	-	1,35,612	-
BSE Cash Turnover	-	12,22,648	-
Total Turnover	-	1,29,10,517	-

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FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	06-Aug-26		05-Aug-26		04-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	2,254	-1,391	-823	859	-500	110
Index option	-1,232	26,750	-13,683	33,264	18,345	-1,08,813
Stock Future	242	991	48	3,140	-1,169	-444
Stock option	-174	5,347	22	7,788	267	-43,06,953
Total	**1,090**	**31,697**	**-14,436**	**45,051**	**16,943**	**-44,16,101**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	06-Aug-26	05-Aug-26	04-Aug-26	03-Aug-26	31-Jul-26
Index Futures	-1,373	1,890	143	-1,188	-1,071
Index Options	2,703	6,015	2,003	4,628	3,514
Stock Futures	79,286	-4,44,486	37,362	1,68,195	2,19,108
Stock Options	17,890	24,186	18,693	23,565	25,483
F&O Total	**98,506**	**-4,12,395**	**58,201**	**1,95,200**	**2,47,035**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
HDFCBANK	30,91,27,650	31,58,15,500	739.5	0.05%	2.16%
KALYANKJIL	2,22,61,500	2,77,24,950	604.2	5.72%	24.54%
SAIL	17,90,55,900	18,44,89,100	177.1	0.47%	3.03%
ETERNAL	15,34,66,125	15,83,11,275	317.7	1.83%	3.16%
SHRIRAMFIN	2,64,22,275	3,00,40,725	1,137.8	1.71%	13.69%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
IDEA	5,87,82,46,950	5,90,07,61,575	12.8	-0.86%	0.38%
POWERGRID	4,71,77,000	5,83,73,700	269.3	-4.71%	23.73%
TATASTEEL	17,42,37,250	18,03,12,000	190.6	-1.37%	3.49%
NHPC	11,94,07,950	12,52,52,900	77.4	-1.04%	4.89%
SWIGGY	6,76,71,000	7,23,92,275	287.5	-0.07%	6.98%

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NIFTY OPTION OPEN INTEREST STATISTICS

HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
11-Aug-26	24,600	PE	86.45	31,00,342	85,43,470	35,05,840
11-Aug-26	24,700	PE	130.35	16,19,264	44,19,155	28,09,690
11-Aug-26	24,650	PE	107.05	23,01,248	37,46,470	23,23,165
11-Aug-26	24,000	PE	5.00	6,26,197	93,88,080	20,08,045
11-Aug-26	24,300	PE	20.20	7,66,640	56,20,875	17,46,680
11-Aug-26	24,100	PE	7.50	4,16,758	44,47,235	16,74,855
11-Aug-26	24,400	PE	33.20	9,62,425	52,49,985	10,88,425
11-Aug-26	23,400	PE	1.95	1,51,275	28,29,060	10,62,555
11-Aug-26	24,700	CE	118.80	23,58,979	83,31,570	9,23,065
11-Aug-26	23,500	PE	2.05	3,99,588	65,92,495	8,81,595

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
11-Aug-26	24,600	CE	174.50	21,56,560	55,32,930	-23,86,540
11-Aug-26	24,550	CE	207.40	4,26,718	10,33,760	-15,38,420
11-Aug-26	24,500	CE	242.50	4,98,202	27,69,780	-14,30,390
11-Aug-26	25,450	CE	2.25	2,43,019	8,17,115	-7,98,525
11-Aug-26	22,000	PE	0.80	53,813	12,65,225	-4,62,865
25-Aug-26	25,000	CE	127.60	70,531	50,54,075	-4,11,775
11-Aug-26	24,900	CE	45.50	9,64,582	58,13,470	-3,78,625
25-Aug-26	24,500	CE	388.60	46,988	41,63,315	-3,70,890
11-Aug-26	24,800	CE	76.35	14,78,250	66,68,545	-3,31,890
11-Aug-26	25,600	CE	1.45	2,89,375	57,24,875	-3,14,990

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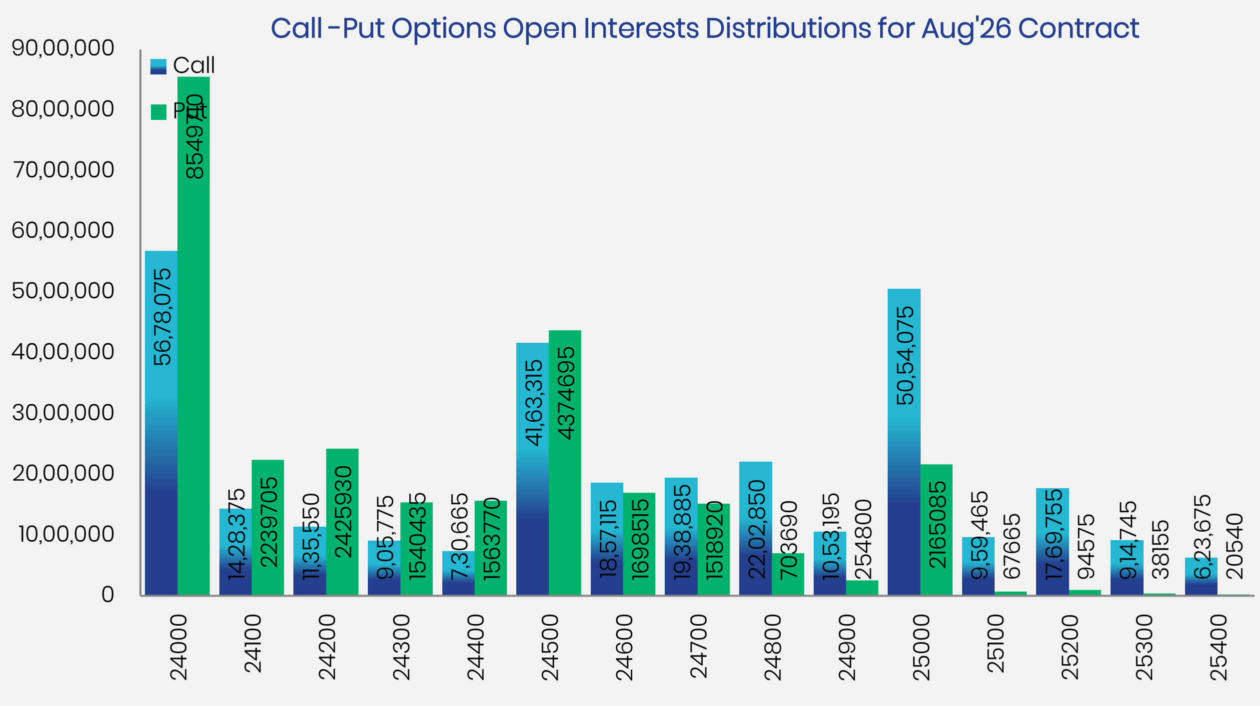
NIFTY OPTION OPEN INTEREST STATISTICS



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	0.12	2,069	39,53,28,225	1,49,38,275
IDEA	25-Aug-26	13	CE	0.36	2,039	26,13,84,075	1,47,23,850
MOTHERSON	25-Aug-26	160	CE	2.69	8,288	1,45,69,350	79,95,000
IDEA	29-Sep-26	18	CE	0.08	187	1,74,39,900	65,04,225
NMDC	25-Aug-26	87	CE	2.13	3,392	76,00,500	55,21,500
IDEA	25-Aug-26	12	PE	0.18	620	19,63,41,825	46,45,875
YESBANK	29-Sep-26	28	CE	0.11	171	1,27,19,900	38,87,500
IDEA	25-Aug-26	13	PE	0.59	712	18,74,07,450	38,59,650
IDEA	29-Sep-26	16	CE	0.13	93	2,75,17,875	37,88,175
SBIN	25-Aug-26	1,090	CE	28.85	21,251	42,42,000	35,77,500

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
JIOFIN	25-Aug-26	260	CE	9.75	6,248	1,27,51,100	-50,94,800
IDEA	25-Aug-26	16	CE	0.04	206	7,71,21,525	-44,31,450
RELIANCE	25-Aug-26	1,300	CE	42.55	71,525	69,48,000	-40,40,000
IDEA	25-Aug-26	14	PE	1.35	96	11,02,14,450	-32,87,850
BEL	25-Aug-26	390	CE	15.45	8,516	42,84,975	-26,93,250
IRFC	25-Aug-26	90	CE	2.21	4,211	2,06,96,375	-24,14,125
BEL	25-Aug-26	410	CE	5.55	12,932	78,67,425	-21,97,350
CANBK	25-Aug-26	130	CE	4.65	6,432	1,60,71,750	-19,98,000
GAIL	25-Aug-26	180	CE	2.66	3,201	1,30,56,900	-19,59,600
SBIN	25-Aug-26	1,050	CE	52.35	12,608	33,18,750	-18,87,750

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Krishna Kumar Agarwal

Digitally signed by Krishna Kumar Agarwal
Date: 2026.08.07 08:43:21 +05'30'

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