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DAILY MORNING REPORT

Thursday, August 13, 2026

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TECHNICAL BUILD UP

OUTLOOK OF THE DAY

- Bearish candle with increase in volume
- Sell crossover in oscillators
- Lower band of Bollinger exist at 23744
- Crucial moving average of 20/50 SMA are at 24305 and 24045
- 200 SMA trend deciding level exist at 24745

Indian Equity Market Performance

Indian equity markets ended Wednesday's session modestly lower, extending losses from the previous session as Brent crude futures remained elevated near $89 a barrel on growing concerns about prolonged disruptions to supply.

Sectoral Front Performance

On the Sectoral front Banking stocks outperformed the broader market, with financials showing relative resilience, while weakness was seen across several other sectors amid cautious sentiment and continued geopolitical concerns.

Technical Analysis

Nifty 50 formed a small-bodied bearish candle with a long lower shadow on the daily chart, resembling a Hammer pattern and indicating buying interest at lower levels. The index continued to hold above all key moving averages, though momentum indicators pointed to a gradual loss of bullish strength. The RSI slipped to 54 and remained in a bearish crossover, while the MACD moved closer to its signal line, suggesting fading upside momentum. A decisive close above 24,500 could revive buying interest and pave the way towards 24,650–24,700. Failure to reclaim this resistance zone, however, may keep the index range-bound and trigger profit booking towards 24,250–24,000. Stronger support is placed at 23,900–23,650. As long as this broader support zone holds, any decline is likely to be viewed as consolidation rather than a trend reversal.

Option Activity

On option front, maximum Put OI is at 24300 followed by 24400 strike, while maximum Call OI is at 24500 followed by 24600 strike. Call writing was seen at 24500 strike, followed by 24600 strike while Put writing was seen at 24300 strike, followed by 24400.

World Indices	LTP	Ch (Pts)	Ch (%)
Dow Jones	53770	-21.6	-0.04
Nasdaq	26588	143.0	0.54
S&P 500	7749	20.3	0.26
FTSE 100	10833	-11.0	-0.10
DAX	26331	-60.4	-0.23
Hang Seng	25394	-46.7	-0.18
Nikkei	68596	1071.9	1.59
Sensex	77966	-187.9	-0.24
Nifty	24436	-35.8	-0.15

Commodity / Forex	LTP	Ch (Pts)	Ch (%)
Gold ($/Oz)	4,472.20	4.70	0.11
Silver ($/Oz)	65.60	0.10	0.15
Brent Crude ($/bl)	87.94	1.04	1.17
Dollar Index	99.92	0.02	0.02
USD/INR	95.42	0.09	0.10
USD/YEN	159.47	0.05	0.03
EUR/USD	1.15	0.00	-0.03

Support/Resistance levels for Indian Equity Indices	S2	S1	CMP	R1	R2
Sensex	76527	77352	77966	78177	78672
Nifty	24000	24250	24436	24500	24650
Nifty Fut	24034	24284	24470	24534	24684

Pivot Level	
Sensex	77909
Nifty	24392

ECONOMY NEWS

India's retail inflation rose marginally to 4.45% in July, from 4.38% in June, as food prices increased, according to data released by MoSPI. (BS)

The country's exports increased by about 15 per cent during April-July this fiscal year despite global uncertainties, Commerce and Industry Minister Piyush Goyal said on Wednesday. (BS)

In a first, India has exported gasoline to Russia, with a shipment carrying around 350,000 barrels of the fuel arriving in Moscow on August 5, according to maritime intelligence firm Kpler. (BS)

Brics economies face common structural constraints in mobilising private capital at scale, Union Finance Minister Nirmala Sitharaman said on Wednesday. Sitharaman said the government believes public capital must act as a catalyst, not a substitute, for private investment. (BS)

India on Wednesday signed the Terms of Reference (ToR) for a preferential trade agreement (PTA) with the South African Customs Union (SACU). Both sides are expected to begin negotiations for the trade deal in a month and aim to conclude the talks within a year. (BS)

The Comptroller and Auditor General (CAG) has detected 1,334 cases of goods and services tax (GST) non-compliance in the works contract and construction sector involving ₹401.42 crore. The Central Board of Indirect Taxes and Customs (CBIC) has accepted observations in 903 of these cases worth ₹268.36 crore and recovered ₹15.88 crore so far. (BS)

The ongoing conflict in West Asia may have fiscal implications during 2026-27 (FY27), the finance ministry told Parliament's Standing Committee on Finance. "As the evolving West Asia conflict begins to exert pressure on economic activity, it may have fiscal implications during 2026-27," the committee's report presented in Parliament quoted the finance ministry's Department of Economic Affairs (DEA) as saying. (BS)

The Department of Financial Services is weighing two options to ease the financial costs involving Unified Payments Interface (UPI): Restoring the merchant discount rate (MDR) for certain high-value transactions or merchants, or introducing a tiered incentive structure to phase out government support over the next few years, the Finance Ministry told the Parliamentary Standing Committee on Finance. (BS)

CORPORATE NEWS

Laurus Labs, Lenskart Solutions, Adani Energy Solutions and Billionbrains Garage Ventures have been added to the MSCI India Index. Astral, Balkrishna Industries and SBI Cards and Payment Services have been removed. The changes will take effect from September 1.

Jio Financial Services and Bank of America Corporation (BofA) have signed a definitive agreement under which BofA will acquire up to 49.9% interest as a joint venture partner in JFSL's wholly owned NBFC lending subsidiary, Jio Credit, through a preferential allotment of equity shares and warrants via Rs 18,268 crore investment.

Bharti Airtel has discontinued all prepaid plans that were offering 1.5 GB data per day with an unlimited calling facility, leaving customers to choose from pricier plans offering higher data usage per day.

Tata Sons chairman N. Chandrasekaran will step down at the end of his current term in February 2027, citing a six-month standoff with a Tata Sons board member who blocked his reappointment as chair of the Tata Group's holding company.

Pilani Investment and Industries Corporation is likely to sell 17 lakh shares, representing a 0.6 percent equity stake, in UltraTech Cement through a block deal. The block deal is estimated at around Rs 1,909 crore, with a floor price of Rs 11,481 per share, CNBC-TV18 reported, quoting sources.

Dixon Technologies proposed a new JV, Advisitar Electronics India Pvt Ltd, with vivo Mobile India for OEM manufacturing of electronic devices, including smartphones. Dixon will hold 51% stake, while vivo Mobile India will hold 49%.

Black Box received a $131-million (₹1,240 crore) data-centre order from a new Tier-1 US hyperscaler, strengthening its order pipeline in the data-centre segment.

GE Power India received two international Notices of Award from Saudi Arabia's Dar Al Balad for Contracting & Operations. The combined order value is ₹550 crore.

Vascon Engineers has received a Letter of Intent (LoI) worth Rs 126.39 crore from the Public Works Department, Wardha-Nagpur, for the development of a 300-bed general hospital in Wardha, Nagpur, Maharashtra.

BULK DEALS

- **Tenneco Clean Air India L:** Tenneco Mauritius Holdings Limited Sell 30270323 Shares @ Rs. 525.5
- **Dr Agarwals Health Care L:** Hyperion Investments Pte. Ltd. Sell 24160000 Shares @ Rs. 501.03
- **Dr Agarwals Health Care L:** Claymore Investments (Mauritius) Pte.Ltd. Sell 15900000 Shares @ Rs. 501.54
- **Dr Agarwals Health Care L:** Icici Prudential Mutual Fund Buy 6211813 Shares @ Rs. 501
- **Dr Agarwals Health Care L:** Polar Capital Funds Plc-Healthcare Opportunities Fund Buy 3626410 Shares @ Rs. 501
- **Dr Agarwals Health Care L:** Invesco Mutual Fund Buy 3565443 Shares @ Rs. 504.64
- **Tenneco Clean Air India L:** Sbi Mutual Fund Buy 3166601 Shares @ Rs. 525
- **Tenneco Clean Air India L:** Hdfc Mutual Fund Buy 2019316 Shares @ Rs. 525
- **Dr Agarwals Health Care L:** Allianz Global Investors Gmbh Acting On Behalf Of Allianz Eee Fonds Buy 1772127 Shares @ Rs. 501
- **Sustainable Energy Infra:** Larsen & Toubro Limited Sell 5600000 Shares @ Rs. 124
- **Panama Petrochem Ltd:** Enigma Small Opportunities Fund Sell 401466 Shares @ Rs. 563.86
- **Unicommerce Esolutions L:** Trustline Deep Alpha Aif - Ii Buy 780800 Shares @ Rs. 91.26
- **Ndl Ventures Limited:** Legends Global Opportunities (Singapore) Pte. Ltd. Sell 436421 Shares @ Rs. 127.02
- **Ganga Forging Limited:** Pine Oak Global Fund Sell 4000000 Shares @ Rs. 2.41
- **Tennind:** Tenneco Mauritius Holdings Limited Sell 20302413 Shares @ Rs. 525.07

INSIDER TRADE

Acquisition

- * Heg Ltd: Sandip Somany, Director, Acquisition 30000 shares on 11-Aug-26
- * Gamco Ltd: RASHI GOENKA, Promoter Group, Acquisition 15066 shares on 07-Aug-26
- * Ncl Industries Ltd-$: Kalidindi Ravi, Promoter and Director, Acquisition 79419 shares on 10-Aug-26
- * Ncl Industries Ltd-$: Promoter Group, Acquisition 11061 shares on 10-Aug-26
- * Dalmia Bharat Ltd: Priyang Dalmia, Promoter Group, Acquisition 359710 shares on 10-Aug-26

Disposal

- * Sterlite Technologies Ltd: Navin Agarwal, Promoter Group, Disposal 5000 shares on 12-Aug-26
- * Dalmia Bharat Ltd: Shri Brahma Creation Trust, Promoter Group, Disposal 359710 shares on 10-Aug-26
- * G N A Axles Ltd: Promoter Group, Disposal 719766 shares on 07-Aug-26

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NIFTY 500

Top 10 Gainer			Top 10 Loser		
Company	Price (Rs.)	Change (%)	Company	Price (Rs.)	Change (%)
APARINDS	18,200.0	8.7%	GODREJCP	910.0	-11.2%
NATIONALUM	418.8	7.9%	PIIND	2,480.0	-9.2%
ZEEL	98.1	7.1%	JUBLPHARMA	882.0	-8.6%
VIJAYA	1,524.9	6.8%	RHIM	385.7	-7.2%
SPLPETRO	727.5	6.2%	GSPL	268.4	-7.1%
AARTIIND	534.0	5.7%	TECHNOE	984.0	-7.0%
FORCEMOT	19,269.0	5.1%	CAPLIPOINT	2,460.0	-6.4%
FINCABLES	1,268.5	5.0%	FORTIS	886.0	-5.3%
BERGEPAINT	558.0	4.3%	AIAENG	4,565.0	-4.5%
BHEL	420.0	4.2%	COHANCE	443.1	-4.5%

FII/FPI & DII TRADING ACTIVITY

Category	Buy Value (₹ Cr.)	Sell Value (₹ Cr.)	Net Value (₹ Cr.)
DII	21,518.55	15,676.89	5,841.66
FII	16,584.64	17,587.14	-1,002.50

Category	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26	06-Aug-26	05-Aug-26
DII	5,841.66	24.77	-1,290.29	235.56	4,013.60	2,883.17
FII	-1,002.50	258.55	1,974.76	480.24	-17.86	-943.42

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DERIVATIVE REPORT

- Nifty declined by 0.15% with Nifty future added 6.28 lakh shares in open interest and stock
- Stock future added 334.9 Lakh shares in open interest.
- Nifty PCR increased to 0.91 from 0.87
- Total Nifty Calls shaded 1335.4 lakh shares in open interest.
- Total Nifty Puts shaded 1065.3 lakh shares in open interest.
- Maximum open interest (Nifty) in Calls for June. series is at 25000 and 24000 put.
- FII's bought net Rs. 1,002.50 Cr (provisional), while DIIs bought net Rs. 5,841.66 Cr in cash market
- FII sold net Rs. 3411.73 Cr in F&O
- Securities in Ban Period: - BANDHANBANK, LICI, MANAPPURAM, SAIL

NIFTY TRACKER

	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26
Spot	24,436.0	24,471.7	24,583.8	24,570.7
% Change in Spot	-0.15%	-0.46%	0.05%	-0.27%
Nifty(FUT) Aug.	24470.5	24540.5	24659.7	24655.0
Nifty(FUT) Aug. Vol.	46992	25675	17424	25115
Nifty(FUT) Aug. - OI	12562810	12123995	12120095	12048595
Nifty(FUT) Sept.	24602.9	24674.1	24790.9	24789.7
Nifty(FUT) Sept. Vol.	6585	3061	2238	2311
Nifty(FUT) Sept. - OI	1528540	1405690	1309685	1259960

TRADE STATISTICS FOR 12-Aug-26

Particulars	Volume (contracts)	Value (₹ Lakhs)	Put Call Ratio
Stock Futures	10,74,023	74,40,913	-
Index Options	4,90,51,142	26,41,978	0.97
Stock Options	80,83,680	8,49,173	0.55
Index Futures	81,928	13,42,898	-
NSE F&O Total Turnover	5,82,90,773	1,22,74,962	0.89
NSE Cash Turnover	-	1,30,811	-
BSE Cash Turnover	-	11,36,910	-
Total Turnover	-	1,35,42,683	-

FII CORNER (F&O)

FII NET BUYING/SELLING & CHANGE IN OPEN INTEREST (Cr. Rupee)						
Particulars	12-Aug-26		11-Aug-26		10-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	-1,384	2,554	-647	86	-354	143
Index option	-2,770	36,894	-24,774	-94,342	3,925	12,592
Stock Future	1,048	-99	-921	-1,699	-597	350
Stock option	-306	4,479	-652	2,407	-431	5,170
Total	**-3,412**	**43,828**	**-26,994**	**-93,548**	**2,543**	**18,255**

MARKET OPEN INTEREST

Addition/Reduction in Market Open Interest					
Contracts	12-Aug-26	11-Aug-26	10-Aug-26	07-Aug-26	06-Aug-26
Index Futures	1,582	-6	363	480	-1,373
Index Options	4,816	165	1,593	230	2,703
Stock Futures	-5,82,231	2,03,163	1,79,502	1,73,768	79,286
Stock Options	14,488	15,769	19,157	22,806	17,890
F&O Total	**-5,61,345**	**2,19,091**	**2,00,616**	**1,97,285**	**98,506**

Increase in OI with Increase in Price (Long Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
YESBANK	1,14,35,15,900	1,15,03,26,800	22.9	0.93%	0.60%
JIOFIN	18,34,10,450	18,75,46,450	256.4	1.36%	2.26%
NMDC	34,99,94,250	35,41,11,750	85.3	0.71%	1.18%
LICI	5,81,63,000	6,19,61,200	415.8	2.10%	6.53%
INDUSTOWER	9,15,46,700	9,44,04,400	385.0	3.73%	3.12%

Increase in OI with Decrease in Price (Short Buildup)					
Symbol	Prev OI	Curr OI	Price	Price Chg(%)	OI Chg(%)
MANAPPURAM	6,61,17,000	7,44,33,000	355.2	-1.91%	12.58%
GODREJCP	1,15,22,500	1,88,31,000	911.5	-10.63%	63.43%
ITC	15,75,45,975	16,22,19,000	277.3	-1.00%	2.97%
TMPV	7,47,64,800	7,89,79,200	343.2	-1.51%	5.64%
ETERNAL	14,84,05,150	15,15,91,600	314.9	-0.74%	2.15%

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NIFTY OPTION OPEN INTEREST STATISTICS

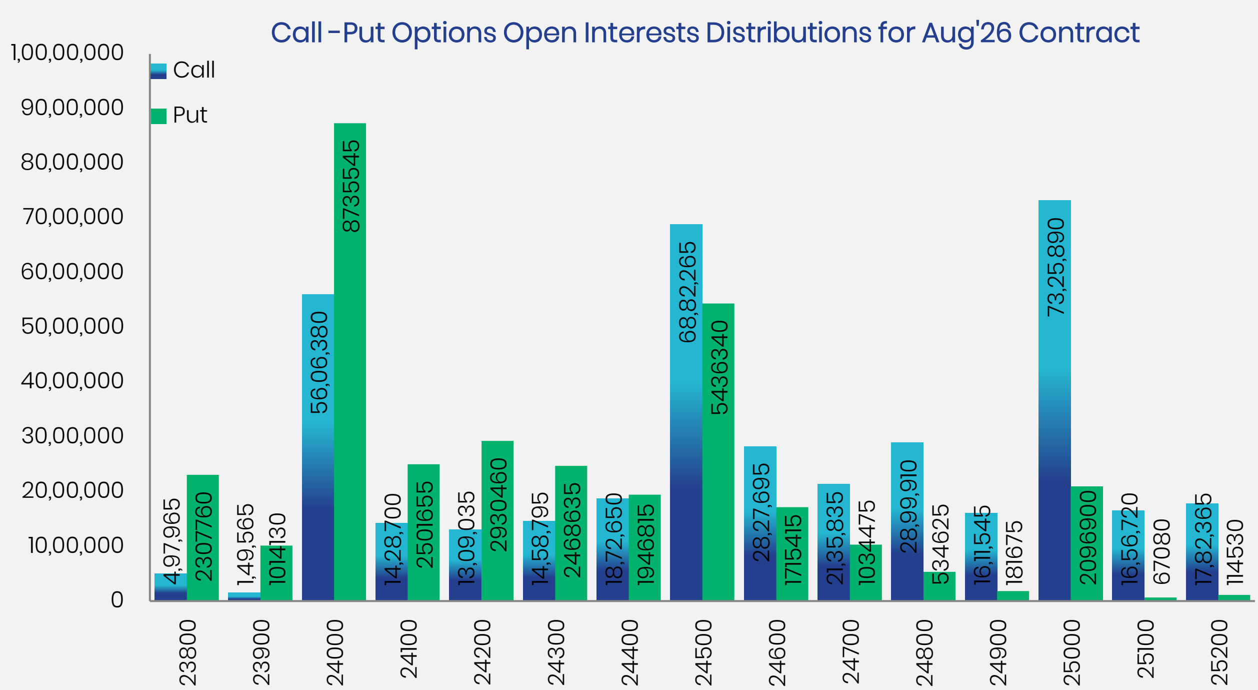
HIGHEST ADDITIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	24,400	CE	145.05	20,50,696	60,40,580	42,06,280
18-Aug-26	24,500	CE	96.20	19,88,153	89,39,710	38,02,435
18-Aug-26	24,300	PE	65.85	23,51,426	56,41,935	29,05,110
18-Aug-26	25,000	CE	6.05	8,24,244	91,37,440	26,29,770
18-Aug-26	24,600	CE	59.60	11,96,117	70,78,565	25,71,790
18-Aug-26	24,850	CE	13.85	4,30,545	31,81,100	21,82,440
18-Aug-26	25,500	CE	1.30	4,11,472	73,52,540	21,38,760
18-Aug-26	24,300	CE	207.80	12,83,886	23,88,555	18,54,775
18-Aug-26	24,000	PE	14.65	12,29,884	76,93,010	18,41,190
18-Aug-26	26,000	CE	0.80	2,89,617	64,60,220	18,20,130

HIGHEST REDUCTIONS

Expiry	Strike	Option Type	Settlement Price	Volume	Open Interest	Change In OI
18-Aug-26	24,500	PE	153.10	12,13,594	30,82,040	-11,87,420
18-Aug-26	25,250	CE	2.05	4,27,809	11,64,410	-9,23,455
18-Aug-26	24,600	PE	216.55	3,30,816	16,64,195	-2,07,805
25-Aug-26	25,000	PE	557.60	12,433	20,96,900	-1,74,200
18-Aug-26	26,200	CE	0.70	37,674	2,59,220	-1,56,845
18-Aug-26	24,700	PE	291.65	80,751	8,33,885	-1,53,920
25-Aug-26	23,600	PE	15.55	37,917	9,86,180	-1,46,055
18-Aug-26	24,750	CE	25.60	4,85,627	20,72,980	-1,32,925
18-Aug-26	24,450	PE	126.30	11,29,531	14,50,475	-1,22,850
25-Aug-26	25,550	CE	3.85	13,243	73,515	-1,07,185

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	0.23	16,941	51,39,05,250	4,43,14,500
IDEA	25-Aug-26	12	PE	0.04	5,737	23,55,10,125	3,36,64,725
IDEA	25-Aug-26	13	PE	0.16	7,265	24,04,41,900	2,23,71,675
IDEA	25-Aug-26	15	CE	0.08	8,175	30,51,26,775	1,55,10,075
IDEA	29-Sep-26	13	PE	0.37	589	1,91,55,300	1,04,35,350
IDEA	29-Sep-26	12	PE	0.14	558	4,05,97,800	1,02,92,400
IDEA	29-Sep-26	15	CE	0.32	1,081	7,54,06,125	97,92,075
IDEA	25-Aug-26	14	PE	0.62	1,744	11,90,05,875	86,48,475
IDEA	29-Sep-26	18	CE	0.09	265	2,88,04,425	73,61,925
NMDC	25-Aug-26	95	CE	0.36	5,741	1,07,05,500	68,51,250

HIGHEST REDUCTIONS

Symbol	Expiry	Strike	Option Type	Settl. Price	Volume	Open Int.	Change in OI
IDEA	25-Aug-26	13	CE	0.73	8,929	32,07,79,800	-1,72,25,475
PNB	25-Aug-26	115	CE	4.81	5,215	94,00,000	-67,76,000
IDEA	25-Aug-26	15	PE	1.46	430	8,83,43,100	-49,31,775
NATIONALUM	25-Aug-26	390	CE	30.90	5,818	11,15,625	-36,41,250
BHEL	25-Aug-26	410	CE	16.60	6,836	47,64,375	-29,63,625
NATIONALUM	25-Aug-26	400	CE	22.95	11,396	33,20,625	-26,19,375
CANBK	25-Aug-26	130	CE	3.94	3,956	1,41,27,750	-26,19,000
YESBANK	25-Aug-26	22	PE	0.13	711	4,40,37,600	-23,63,600
IDFCFIRSTB	25-Aug-26	85	CE	2.14	1,807	1,51,18,250	-23,09,475
SBIN	25-Aug-26	1,100	CE	12.10	36,563	1,13,50,500	-19,89,750

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Krishna Kumar Agarwal

Digitally signed by Krishna Kumar Agarwal
Date: 2026.08.13 08:39:03 +05'30'

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